Virtual AskQC Office Hours | June 2024

Metadata automation tools: Collection Manager

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Agenda

- Intro to WorldCat knowledge base
- Metadata automation tools available in Collection Manager
- How to customize record output
Metadata automation tools

WorldShare® Collection Manager

- WorldCat knowledge base collections
- WorldCat cataloging partner collections
- WorldCat query collections
- WorldCat updates
- WorldCat data sync collections

#OCLCcataloging oc.lc/get-cm
WorldCat knowledge base collections

- Simplify and automate your electronic workflows
- Improve the quality of your catalog
- Make your e-resources easier to find, share and use
- Automatically maintain WorldCat holdings
How knowledge base collections work

Register your collections...

WorldCat®
knowledge base
How knowledge base collections works

OCLC automatically detects...

✓ new titles
✓ updates
✓ deletes

OCLC automatically...

✓ maintains WorldCat holdings
✓ delivers MARC records
WorldCat knowledge base collections
Automate your holdings management

Future partners:

#OCLCcataloging

oc.lc/autoload
What’s inside our KB?

79+ million records through over 28,000+ content collections from 676 providers

- Subscription packages
- Title by title purchases
- Open Access content
- Demand Driven Acquisitions
- Consortial versions
- Cooperatively created and managed
- Locally defined

For a complete list, visit oc.lc/kbcollections
Automated creation of WorldCat records

Titles added to WorldCat knowledge base

KB titles matched to WorldCat bibliographic records

New records created if no match

WorldCat holdings managed

WorldCat MARC records output

Titles discoverable in WorldCat and WorldCat Discovery
Why customize records?

- Add specific field to my MARC records
- Include WorldCat knowledge base links
- Include specific subject headings or URI sets
- I want to know why I received an update record
- Delete MARC fields
Customize WorldCat Records

- Record Manager
- My Labels

Collection Manager

Search
- Data Type: Collection
- Scope: My Selected Collections
- Search Term(s)

Search
- Search
- Clear
- Close All Tabs

Search Collections with ″, My Selected Collections

Institution Settings
- OCLC Symbol
- Knowledge Base Data
- WorldCat Holdings
- Proxy and Authentication
- Provider Settings
- WorldCat Discovery
- MARC Records

Enable MARC Records Delivery
- Yes
- No

Customize Records
- WorldCat Updates
- Record Delivery
- Cataloging Partner Options

#OCLCcataloging
Customize Records

Customize the information included in your institution's MARC records. You can also control MARC options for an individual collection at the collection level.

Required field

All Collections

Holding Library Code (049 Sa)

Delete Fields

Tag Ind 1 Ind 2 Any

Delete Subfields

Tag Ind 1 Ind 2 Subfield

Add Fields

Tag 590 Ind 1 Ind 2

Subfield

oc.lc/cm-record-settings
Data that can be mapped to my records

- Cataloging Partner Data
- Collection Custom Text
- Collection Level Data
- Copy Call Number
- Date Delivered
- Enter Free Form Text
- KB Title Level Data
- Local System Number
- OCLC Number
- Reason for Updated Record
- Transaction Type

oc.lc/cm-record-settings
Reason for Record Output

- Add a customize field to your MARC record output that details the reason an update was delivered

[Diagram showing how to add a field with tag 999 and subfield a, labeled "Reason for Record Output"]

#OCLCcataloging oc.lc/cm-record-settings
Enter freeform text

- Add freeform text in a MARC field

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[oc.lc/cm-record-settings]
Delete specific fields

- Specify MARC fields and subfields your library does not want included in record delivery

```
Delete Fields
Tag 505  Ind 1 Any  Ind 2 Any

Delete Subfields
Tag 245  Ind 1 1  Ind 2 2  Subfield t
```

[hyperlink: oc.lc/cm-record-settings]
Metadata automation tools

WorldShare® Collection Manager

- WorldCat knowledge base collections
- WorldCat cataloging partner collections
- WorldCat query collections
- WorldCat updates
- WorldCat data sync collections

#OCLCcataloging

oc.lc/get-cm
WorldCat Updates
Automatically receive updates as records change

Library Community

OCLC

Your Catalog

#OCLCcataloging

oc.lc/cm-updates
Configure WorldCat Updates

• Records for merges and kb record URL changes always included
• Include records with updates to $1 field in these specified fields
• Include specific field changes
• Libraries are able include or exclude records based on specified criteria

oc.lc/cm-updates
Configure WorldCat Updates

Include/Exclude

Updates Will Include
Receive updates when $1 is modified
- Yes
- No

Field Changes in WorldCat Record
- Tag 1
- Tag 5
- Tag 6
- Tag 7
- Ind 1
- Ind 2
- Any

Encoding Levels Changes
- Blank
- 1
- 4
- 5
- 7
- 8
- Ind 1
- Ind 2
- M

Other Changes
- Date/Publication Status (DISI) changes
- 040 changes to include 040 $0 rda

oc.lc/cm-updates
Configure WorldCat Updates

<table>
<thead>
<tr>
<th>Include</th>
<th>Exclude</th>
</tr>
</thead>
</table>

**Updates Will Exclude**

**Exclude Material Types**
- Book
- Map
- Sound Recording

**Exclude Electronic Resources**
- Online
- Direct electronic
- Electronic

**Exclude Publication Year**
- 1983

**Exclude Records Upgraded by my Library**
- TAWMS

[oc.lc/cm-updates]
WorldCat Query Collections

Subject-specific serials, Books or journals?

New titles added by your library?

Your holdings? By format? By date?

All records for a specific subject today, and new titles?

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oc.lc/cm-query
WorldCat Query Collections

- li:SYMBOL – All holdings
- l4: SYMBOL – All holdings that have LHRs
- li:SYMBOL AND mt:bks – All books with holdings
- li:SYMBOL AND mt:bks NOT x4:digital – All eBooks
- li:SYMBOL AND mt:ser – All serials
- li:SYMBOL AND mt:ser NOT x4:digital – All eSerials
- All indexes can be found in OCLC documentation:

[oc.lc/indexes]
WorldCat Query Collections

• Click Create a Collection
• Select Query Collection from Collection Type menu

[Diagram of Collection Manager]

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WorldCat Query Collections

- Collection Name
- Selection Criteria
- Collection Type
  - One-time
  - Ongoing

oc.lc/cm-query
Coming soon: Record Delivery Templates

- Allow more settings at the collection level, not just institution level
- Make it easier to apply the same set of settings across multiple collections