



OhioLINK

Ohio's Academic Library Consortium

Introduction to the OhioLINK Central Catalog

Presenters: **Anita Cook, Emily Flynn, and Theda Schwing**
WebEx Presentation
March 24, 2014

www.ohiolink.edu

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Webinar Etiquette

- We will be muting everyone
- If you have a question, use the Chat Feature on WebEx
- We will pause occasionally to answer questions



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About the Presenters

Systems and Technical Services Unit of OhioLINK

- Anita Cook, Unit Head
- Emily Flynn, Metadata & eResource Librarian
- Theda Schwing, Continuing Resources & Database Management Librarian



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In the beginning...

- OhioLINK was imagined in the 1980s
- 400 page RFP was created
- Knew the system imagined would have to be developed
- Chose Innovative Interfaces, Inc. as a development partner



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The development years...

- What was originally imagined?
 - A system of institutional integrated library systems
 - Connected to a central hub

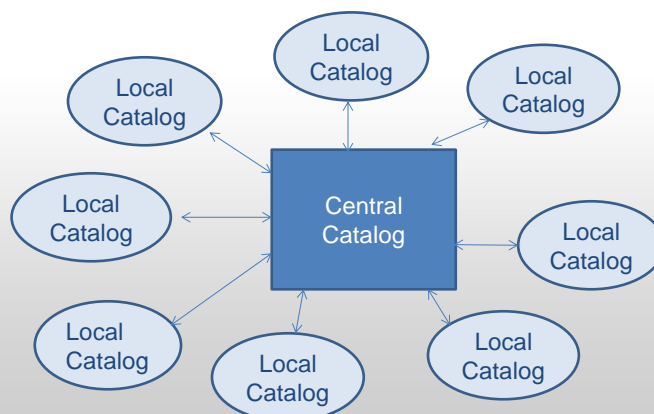


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Hub and spoke system



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How it was envisioned to work...

Bibliographic and item records would be created on the local catalog

- These records would then be loaded to the Central Catalog in real time

All transactions that occurred on the local catalog would update the Central Catalog in real time

- Changes in the bib or item record, status changes, etc.

Patrons would be able to seamlessly move from the local catalog to the Central Catalog



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Questions about the history?



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Original Matching Algorithm (1992-2011)

- If the two records had the same 001 (OCLC number), then it was a match.
- If there were two different 001's, then there was no match and a new record was created.



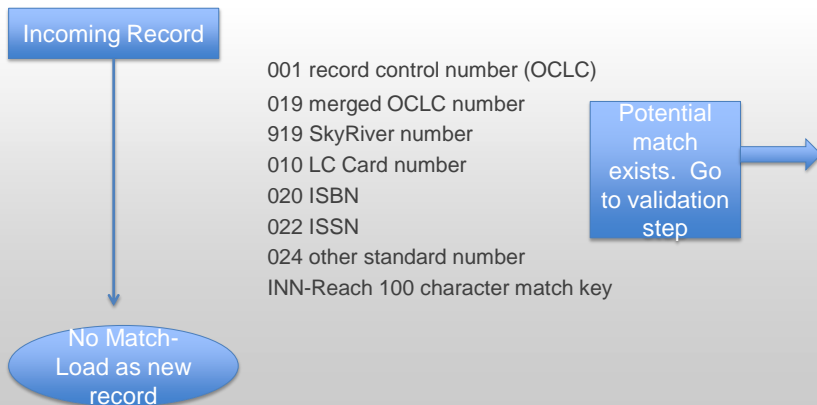
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“New Matching Algorithm”

Introduced in Spring of 2012

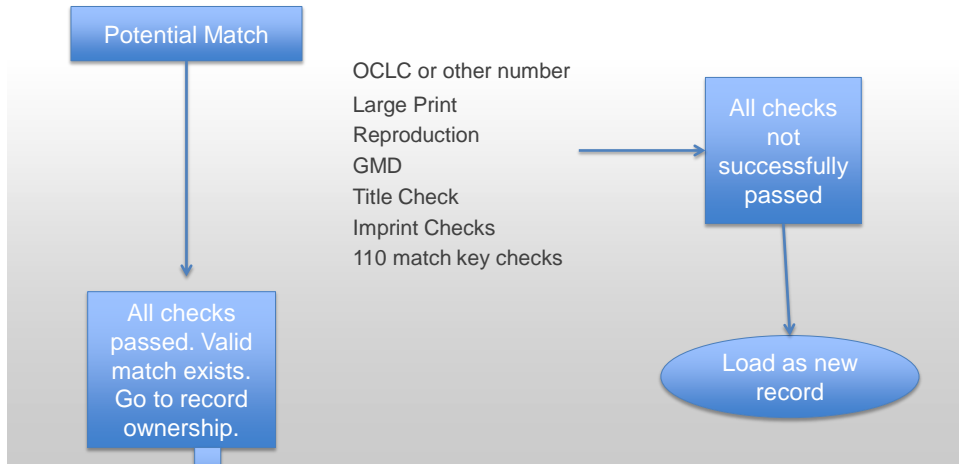


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Validation Step



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Central Catalog Record Ownership

- Master bibliographic record is selected
 - Based on
 - Existence of a standard set of fields
 - Load Priority Table
 - Encoding Level



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MARC Fields that should exist in the Master record

- 001 — record control number
- 019 — former OCLC number
- 008 — fixed fields
- 6xx — subjects
- 4xx — series
- 8xx — series
- 505 — contents note
- 520 — summary note
- 655 — genre
- 007 — media fixed fields
- 880 — vernacular language fields



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Load Priority Table

- Priority 1:** Libraries that maintain authority control on both LC and MeSH headings
- Priority 2:** Other OhioLINK libraries that use OCLC for cataloging
- Priority 3:** Center for Research Libraries records
- Priority 4:** OhioLINK libraries that do not use OCLC for cataloging



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Encoding Level Table

Encoding Group	Encoding Level
10	blank — Full level (by authorized national bibliographic agencies and libraries)
9	I — Full level input by an OCLC library 4 — Core level
8	1 — Full level, material not examined
7	L — Non-LC & non-NLM loaded from tape
6	K — Less than full input by an OCLC library J — Record deleted by LC from MARC file 2 — Less than full level M — Less than full level, tape loaded
5	8 — CIP prepublication data
4	5 — Partial level 7 — Minimal level
3	E — System-identified error in LC MARC record W — Warning possible error in LC MARC record 3 — Abbreviated level
2	U — Unknown Z — Not applicable



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If all things match...

- Then the bib record that arrived first becomes or stays the Master Record
- Holdings of the other institutions matching on that bib record are attached to that bib
- Only the owner of the Master Record can make changes to the bib record in the Central Catalog



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Sample bib record...

How do you tell from a record in the Central Catalog, who is the owner of the Master Record?

<http://olc1.ohiolink.edu/search~S0?/o725827710>



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Questions about contributing and matching?



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Central Catalog Timeline

- First version of the Central Catalog
 - Implemented in November 1992
 - Six libraries had contributed records to it
 - 2,360,432 bib records
- PCIRC (state-wide resource sharing) went live
 - January 1994
 - 16 libraries



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Central Catalog Timeline

- First of the community colleges added in July 1994 (Columbus State)
- First of independent colleges joined in December 1995 (Ohio Northern University)
- Center for Research Libraries contributed their records in November 1997



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Current Statistics

- Central Catalog represents:
 - 91 member institutions
 - 62 local Innovative systems
 - 2 multi-library shared systems (OPAL and CONSORT)
 - Latest member to add their records in February 2014
 - Lake Erie College (48,473)
 - 13,887,316 bib records (as of 3/10/2014)
 - 47 million item records



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Questions about the timeline or current system?



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DMS

Database Management and Standards Committee (DMS)

- Sets standards for the Central Catalog
- Oversees the quality control
- Makes recommendations for enhancements
- Conducts training
- Consists of catalogers from institutional membership
- Theda Schwing is the OhioLINK liaison



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Minimum Catalog Standard

For contribution to the Central Catalog, a record must have a minimum set of fields:

MANDATORY:	TITLE	• Include subtitle if available (including cataloger supplied titles)
	IMPRINT	• Place (City) : Publisher, Date
REQUIRED IF AVAILABLE:	AUTHOR, first or primary	• Personal author Last Name, First • Corporate author Full Name
	EDITION STATEMENT	
	SERIES TITLE; v	• Record the series statement as it appears on the source
	STANDARD NUMBERS	• ISBN (input without hyphens into the "ISBN/ISSN" field) • ISSN (input with a hyphen into the "ISBN/ISSN" field)
OPTIONAL:	ADDED AUTHOR	
	LCCN	
	OCLC NUMBER	



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Do Not Contribute

Suppress (**BCODE3 = z**) the following types of records from the Central Catalog.

- **Approval records** added to local systems should not be contributed to the Central database until accepted at the local system.
- Records for new items on the **GPO shipping list** should not be contributed to Central until an OCLC number is available. The only exception to this policy is for the State Library, since it is a full depository.
- **Circulation on-the-fly** records should never be contributed to the Central database.
- **Non-MARC brief order/bib records.** INN-Reach software automatically assigns Encoding Level blank to non-MARC records, which gives them the highest priority to become [master record](#).



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Questions about Minimum Cataloging Standards?



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Statuses (Item Records)

The number 1 thing to remember about statuses is that what is transferred from the local system to the Central Catalog is the **SYMBOL** and not the **MEANING**.

https://www.ohiolink.edu/content/appendix_a6



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Location Codes

- Local library locations
 - Display on the Central Catalog
 - Do NOT determine central loan rules
- Two types of OhioLINK Branch locations
 - 5 character institutional code (os4ug)
 - Pickup Anywhere code (y0212)
 - Can only turn PCIRC off or on by institutional code



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Loan Rules

Loan rules for PCIRC are determined by three fields:

1. **5 character code**
 - Must be loaded in every local system including SearchOhio codes
2. **Patron type**
 - Central ptypes must be in local tables
 - Local ptypes are mapped to central ptypes on Central Catalog
3. **Item type**
 - Central itypes must be in local tables
 - Local itypes are mapped to central itypes on Central Catalog



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Borrowing and Lending

When you are the **LENDER** of a book to another institution... (**INSTITUTION LOAN RULE**)

- The patron's ptype is mapped to a central ptype
- This ptype is then matched with your local itype to determine the loan rule

When **YOUR** patron borrows a book from another institution... (**PATRON LOAN RULE**)

- The lending library's itype is converted into a central itype
- Your local ptype is used with the new itype to determine the loan rule



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Questions about how PCIRC works?



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OhioLINK eResources

- Beyond the books that individual libraries purchase, OhioLINK also purchases consortial eResources
 - eBooks, eJournals, electronic book chapters, etc.
- These items have records that are loaded to the Central Catalog
- Batches of records are also distributed to libraries to load in their local catalogs



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eResources Cataloging Process

Current Process

- MARC records are received from publisher or OCLC
- Volunteers at member libraries complete cataloging and contribute records
- OhioLINK staff post batches of records to ftp site and notify lists



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eResources Cataloging Process

Future Process

- MARC records are received from publisher or OCLC
- OhioLINK staff complete cataloging and contribute records
- OhioLINK staff post batches of records to ftp site and notify lists



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eResources Cataloging Details

- The “local” catalog for OhioLINK will be the Serials catalog (previously no local OhioLINK catalog)
- For local loading of eResources records, keep an eye on the DMS and Lead Implementors listservs
- OhioLINK is expecting to transition from the old cataloging process to the new process in April



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Questions about eResource Cataloging?



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Thanks To:

Before we close, a big thank you to all the volunteers who have been volunteer catalogers for OhioLINK!

- Earline Antosch (OSU)
- Sherab Chen (OSU)
- Marty Jenkins (WSU)
- Tom Hinders (Oberlin)
- Kathy Hughes (SLO)
- Janet Moyer (UD)
- Roman Panchyshyn (Kent)
- Carrie Preston (OU)
- Yuezeng Shen (Cleveland State)
- Jeff Trimble (YSU)
- James Whitcomb (OSU)
- Kevin Whitfield (YSU)



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Further Information

Can be found on OhioLINK's website:

Intercampus Services Committee (PCIRC):

https://www.ohiolink.edu/content/circulation_and_ill_staff_information

Database Management and Standards Committee (Cataloging):

https://www.ohiolink.edu/content/technical_services_staff_information



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Other Questions?

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