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
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

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
The development years…

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

Questions about the history?
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.

“New Matching Algorithm”

Introduced in Spring of 2012

Incoming Record

001 record control number (OCLC)
019 merged OCLC number
919 SkyRiver number
010 LC Card number
020 ISBN
022 ISSN
024 other standard number
INN-Reach 100 character match key

Potential match exists. Go to validation step

No Match-
Load as new record
Validation Step

Potential Match

OCLC or other number
Large Print
Reproduction
GMD
Title Check
Imprint Checks
110 match key checks

All checks not successfully passed

Load as new record

All checks passed. Valid match exists. Go to record ownership.

Central Catalog Record Ownership

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

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
Encoding Level Table

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

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
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

Questions about contributing and matching?
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

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
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

Questions about the timeline or current system?
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

Minimum Catalog Standard

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

<table>
<thead>
<tr>
<th>MANDATORY</th>
<th>TITLE</th>
<th>• Include subtitle if available (including cataloger supplied titles)</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMPORT</td>
<td></td>
<td>• Place (City) : Publisher, Date</td>
</tr>
<tr>
<td>REQUIRED IF AVAILABLE:</td>
<td>AUTHOR, first or primary</td>
<td>• Personal author Last Name, First</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Corporate author Full Name</td>
</tr>
<tr>
<td>EDITION STATEMENT</td>
<td></td>
<td>• Record the series statement as it appears on the source</td>
</tr>
<tr>
<td>SERIES TITLE ; v</td>
<td></td>
<td>• ISSN (input without hyphen into the &quot;ISBN/ISSN&quot; field)</td>
</tr>
<tr>
<td>STANDARD NUMBERS</td>
<td></td>
<td>• ISBN (input with a hyphen into the &quot;ISBN/ISSN&quot; field)</td>
</tr>
<tr>
<td>OPTIONAL:</td>
<td>ADDED AUTHOR</td>
<td></td>
</tr>
<tr>
<td></td>
<td>LCCN</td>
<td></td>
</tr>
<tr>
<td></td>
<td>OCLC NUMBER</td>
<td></td>
</tr>
</tbody>
</table>
Do Not Contribute

Suppress ($\text{BCODE3} = z$) 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**.

Questions about Minimum Cataloging Standards?
Statues (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

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
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

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
Questions about how PCIRC works?

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
**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

**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
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

Questions about eResource Cataloging?
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)

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
Other Questions?

Anita Cook  
Coordinator, OhioLINK Catalogs  
anita@ohiolink.edu

Emily Flynn  
Metadata and eResource Librarian  
emily@ohiolink.edu

Theda Schwing  
Continuing Resources & Database Management Librarian  
theda@ohiolink.edu

Presentation Survey

If you watched the recorded webinar or read the presentation slides, please take a minute to fill out a brief survey. This will help OhioLINK make improvements for future presentations.

https://www.surveymonkey.com/s/Z2NYVQG