

## 2019-09-11 VAOH Session

### Presentation summary

Mark Calkins presented an overview of the WorldCat Knowledge Base which is a database that enable libraries to manage their subscribed and open access e-resource through WorldShare Collection Manager. Mark also discussed how the knowledge base data is used to do such tasks as set WorldCat holdings, full-text linking, and automate e-resource management. Additional information was provided on the OCLC KBART format which contains title list and coverage data information. Mark explained its correlation with KBART fields and best practices when using this format with the WorldCat knowledge base.

URLs mentioned during the presentation:

- For additional information about Autoload WorldCat Knowledge Base providers: [oclc.org/autoload](https://oclc.org/oclc/autoload)
- For additional information about using KBART files: [oclc.org/oclc-kbart-data](https://oclc.org/oclc/kbart-data)

### Member questions

#### **What is LHR?**

Answer: Local holdings records (LHR) are attached to a bibliographic record. These types of records allow libraries to provide additional information regarding your item-specific holding. An example of this can be a serial where you can indicate what issues and coverage you have for the title which can be different from the entire run of that serial. Your library may have volume 5 to 100 even though the serial contains much more.

#### **How does the format in the bibliographic record (i.e., "Journal," "E-book," "Audio") corresponds with the choice of Format in the knowledge base (KB) record? Is it not a 1:1 relationship?**

Answer: There are some correlations between the bibliographic record and KB record. The type and bib level for a MARC record is described differently and in a more granular way. KBART data is simple and have fewer values to describe resources.

#### **How can a mismatch link be removed from a KB record? Generally, the title matches but not the author or date. This tends to happen when there is no ISBN for older books.**

Answer: You always want to include as much information as is available for the resource. For older books it helps to have title, author, publisher, and date of publication. These fields are important for the matching process. There are times though when titles are so similar that erroneous links are generated. If this is the case, you will have to create a separate collection to separate the link from the WorldCat record.

#### **How is the choice of MARC record determined for titles in KB collections?**

Answer: Generally, the fullest and most correct record is chosen for the resource.

**Our institution created the collection: National Academies Press open access monographs Collection ID: global.112903.ScipNAP. When we want to add newly cataloged titles with their url, etc. info to this collection, is there any way to upload this information in batch, rather than adding titles one-by-one? We have tried to do this but cannot get it to work.**

Answer: A record load is very different from a collection load. Usually you would need a batchload service to create new records. Whereas the knowledge base record will show there is a link, set a holding, and so forth as described in the presentation. It seems for this collection you may want to do both.

Also, suggested by an attendee, you could create a KBART file, where you add the OCN in the appropriate field, and then upload to your Collection. Mark confirmed this is possible using the autofill feature but if doing this make sure to also include the title URL in your KBART upload.

**Is there any way to have holdings set on records without having an OCLC record number in KB?**

Answer: There is not.

**Within a KB collection, does OCLC run dedup if different records were added but actually represent the same manifestation?**

Answer: No, due to the design of the KB database. An example of this is serials where it may seem like duplicate records, but they are not. If there is a true duplicate where everything really does match, then we try and remove one of the records.

**Does manually removing an incorrectly matched OCN from a KB title prevent it from re-matching in the future?**

Answer: If there is an underlying data issue behind that (e.g., such as an incorrect ISBN on the KB record or WorldCat bibliographic record) those will return. We have to do extensive investigative work to see where the incorrect data element is coming from.

**If you activate a collection in the KB, does that automatically add your library's holdings (so that it displays in Connexion as "Held by XXX")?**

Answer: If your settings have been marked in WorldShare Collection Manager to maintain WorldCat holdings then it will.

**Is there an easy way to search Discovery for physical items with an institution's holdings, but no LHR? I would like to clean up my library's holdings, but the searches I try always result in about 99% eBooks, even when I specify and/or exclude a format type in the search. I have tried excluding eBooks in the search, but they still show up in the search results.**

Answer: The WorldCat Discovery search criteria that should return library holdings but exclude LHRs and digital content: li:<OCLC Symbol> NOT I4:<OCLC Symbol> NOT x4:digital (Do not include brackets around OCLC symbol). Also, one of the attendees mentioned during the end of August, Discovery was having some search issues--including not matching format limits--which have since been resolved.

**Do you know whether there is any plan to create some sort of notification when a new file is being added to the KB? I've had a situation where I saw a certain number of titles in the collection, but then**

**a little while later, there were more titles in the collection. It turned out that the collection was being updated on the back end.**

Answer: There currently isn't a notification system besides what is in our activity history. We can talk to our product team to see if this something that can be considered in the future. Thank you for the recommendation.

**Is there a way to get a file of all the records in a collection without waiting for an add or change to any of the records-If the setting is to receive a full set each time?**

Answer: In WorldShare Collection Manager you can change a setting in the collection to do a daily run and get the records within 24 hours. This would be the best way to do this.

**If I change a collection to daily will I get a file in the next day or so?**

Answer: Yes.

**We've been using the monthly archive of GPO's New Electronic Titles to obtain the OCLC numbers for entering as batch search keys, then we set holdings and export the bibs. I assume that we can do this using Collection Manager. How does the Collection Manager routine work, at least basically? And how would we transition from the monthly GPO file to the titles added since then? For example, the collection U. S. Government Documents at the moment has 161,224 titles.**

Answer: Yes, this may be achieved by using the WorldCat knowledge base within WorldShare Collection Manager. Autoload feeds are available for libraries who participate in the Federal Depository Library Program (FDLP) where U.S. Government Document collections will be regularly maintained for them. When titles are enabled in this process the library may setup MARC record delivery/output within those collections. You may find more information about how to sign-up for the GPO autoload feed here: [https://help.oclc.org/Metadata\\_Services/WorldShare\\_Collection\\_Manager/Choose\\_your\\_Collection\\_Manager\\_workflow/Use\\_Collection\\_Manager\\_for\\_content\\_from\\_a\\_specific\\_provider/Providers\\_and\\_contacts\\_for\\_automatic\\_collection\\_loading/GPO](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Use_Collection_Manager_for_content_from_a_specific_provider/Providers_and_contacts_for_automatic_collection_loading/GPO)

**How does merging of bibs affect the KB?**

Answer: There is a process that accounts for merging. The retained OCLC number will eventually be updated in the KB when merges occur.

**If we get MARC records from a vendor, but know the records are in OCLC with good OCLC numbers, is there a way to get OCLC records if the vendor doesn't work with Collection Manager?**

Answer: There are several choices to obtain this. You probably want a batch process. You could put together a file from the vendor (if your licensing allows it) and submit them through data sync and get back OCLC records as a result. You can also put together a batch search in Connexion with the unique identifiers (e.g. ISBNs) and export the records to your catalog or just update your holdings if that's all you need to do. Finally, you can talk to your vendor and let them know it would be great for them to work with us on the knowledge base.

**How long after merging does the KB get updated?**

Answer: Merged OCNs are applied to the WorldCat knowledge base every 24-48 hours.

**When you answer questions that you have to look up (e.g. merging question) where is your answer?**

Answer: Those answers will appear in the summary and member questions transcript, which can be found at [oclc.org/askqc](https://oclc.org/askqc). The recording and presentation slides will also be found there.

**The National Academies Press (NAP), is a global collection set, is anyone else adding to it?**

Answer: Any library may add/update/delete titles to any cooperatively submitted collections via the Cooperative Management feature within WorldShare Collection Manager. All cooperative updates go through an approval process before they are loaded into the KB. In cases where the member institutions who are looking to holistically update a global collection they previously contributed, the member library may send a KBART file with their desired collection updates to [support@oclc.org](mailto:support@oclc.org) which can be refreshed by knowledge base team on their behalf. When supplying a KBART file for this process, please include all titles for the collection within the file.

**If you have a vendor with its own KB, does this duplicate work done with that vendor's work?**

Answer: This depends on the vendor services they desire to use. If they want to use multiple services from separate KB vendors then it would be recommended to synchronize the KBs. You may find more information about the 3rd Party mapping process below which enables libraries to import and map their KB holdings from other KB vendors to the WorldCat knowledge base.

[https://help.oclc.org/Metadata\\_Services/WorldShare\\_Collection\\_Manager/Choose\\_your\\_Collection\\_Manager\\_workflow/Knowledge\\_base\\_collections/Choose\\_a\\_method\\_to\\_add\\_or\\_create\\_a\\_knowledge\\_base\\_collection/Map\\_titles\\_from\\_a\\_holdings\\_file](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Knowledge_base_collections/Choose_a_method_to_add_or_create_a_knowledge_base_collection/Map_titles_from_a_holdings_file)

**Where is Autofill function located in the KB?**

Answer: Is an action within the KBART file. It's the 26<sup>th</sup> field in the KBART file. You would change it from "Select" or "Raw" (which would mean read and write) to "Autofill."