

Making the most out of OCLC's Reclamation Batchload



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Basics on Reclamation



- **What is a Reclamation Batchload?**
 - You can submit the bib records from your catalog, and the Reclamation Batch does the following:
 1. Matches the submitted records to OCLC, sets the holdings and updates the timestamp for your holdings
 2. Runs a scan/delete, which removes holdings with an earlier time stamp (in other words, records not in your catalog)
 - Every library can order one free Reclamation project.

Background



- **Flood of 2009**
 - Following the flood, we weeded our bound periodicals heavily and somewhat in haste.
- **Goals**
 - To have an accurate catalog in both ALEPH and OCLC
 - To improve the ILL process by fixing erroneous holdings

Preparation



- Cataloging Integrity Project
 - Using the General Retrieval Forms to fix discrepancies
- Inventory
- Weeding
- Decide upon collections to include and exclude

Ordering the Reclamation

- First step: Filling out on OCLC's Batchload checklist:

<http://oclc.org/content/dam/support/batchload/documentation/using/checklistfororderingBib.pdf>

- Make sure to request that local holdings records (LHR) are removed.
- For the type of batchload, use One time, Reclamation, and “Set or cancel based on value of Rec Stat”
- “What is the location and format of your unique local system bibliographic number?” This will be 001.
- Should we add your records when they do not match existing WorldCat records?

Ordering the Reclamation



- Working with ODIN (they sent the files on our behalf)
 - The collection is broken down into files of no more than 100,000 records
 - The date/time on which the files are submitted is the Date Stamp that OCLC will use.

Working with the results – Problem Records



- Problem records

- Unresolved records

- ✦ Validation error: The 040 field for some records has invalid codes in one of the \$d subfields. This is invalid.

<i>Leader</i>	LDR	—	—	^^^^^ccm^a22^^^^^I^^45^^
<i>Control No.</i>	001	—	—	002367563
<i>Date and Time</i>	005	—	—	20111215135000.0
<i>Fixed Data</i>	008	—	—	740816q00009999nyu^^^^^^^^^^^^^^n^0 engmu
<i>System No.</i>	035	—	—	9 0000978001
<i>System No.</i>	035	—	a	ocm00978001
<i>Catal. Source</i>	040	—	c	WSU
			d	m.c.
			d	SER
			d	NDV
<i>Local Holdings</i>	049	—	a	NDVA
<i>Local Call No.</i>	090	—	a	M1001

Working with the results – Problem Records



- Problem records
 - Duplicate Records
 - Rejected records
 - ✦ Often those with no OCLC number that either
 - ✦ can't be matched with an existing record, or
 - ✦ do not have enough of a full record to submit as a new record
 - ✦ Those with no 001 field (more on that soon)

Working with the results – Problem Records



- Problem records

- Fixing

- ✦ Which errors need to be fixed?
- ✦ Manually fixing the errors
- ✦ Re-adding holdings in OCLC by using Connexion's batch loading capabilities
- ✦ Verification of fixing

Working with the results – Matched Records



- Files that cover the matched records
 - Cross-reference files

This report provides a cross-reference between your library's unique record control numbers and the OCLC number of the matching records in OCLC WorldCat. If you have any questions about this report or your batchload project, please contact the OCLC Database Specialist assigned to your project.

OCLC XREF REPORT

OCLC Control #	Submitted 001 Field
104872898	(OCoLC) 104872898
10799170	(OCoLC) 10799170
10925102	(OCoLC) 10925102
10998802	(OCoLC) 10998802
11317170	(OCoLC) 11317170
11317173	(OCoLC) 11317173
12090414	(OCoLC) 12090414
122960940	(OCoLC) 122960940
123175001	(OCoLC) 123175001
123754042	(OCoLC) 123754042
123755061	(OCoLC) 123755061
123755919	(OCoLC) 123755919
123756920	(OCoLC) 123756920
123757186	(OCoLC) 123757186
123758102	(OCoLC) 123758102
123758537	(OCoLC) 123758537
123760147	(OCoLC) 123760147
123760564	(OCoLC) 123760564
123761578	(OCoLC) 123761578
123762066	(OCoLC) 123762066
123907530	(OCoLC) 123907530
123915107	(OCoLC) 123915107
123968252	(OCoLC) 123968252
124031949	(OCoLC) 124031949
124035705	(OCoLC) 124035705
124074902	(OCoLC) 124074902

Working with the results – Matched Records



- Files that cover the matched records
 - Files of MARC Records returned from OCLC
 - ✦ Our plan is to overlay certain parts of the records:
 - 035 (most critical)
 - 020 & 022, 100, 245, 260, and 300 fields
 - All fields in the 6xx and 7xx ranges

Challenges along the way



○ Before the Reclamation project began:

- ✦ We sought to overlay as many records as possible with the updated ones.
- ✦ Some problems came up due to inconsistencies with loading records in the past – for smaller record sets, we at VCSU had individually loaded the records.
- ✦ After fixing the inconsistencies, the overlay worked, and all records in this set had real OCLC numbers in the 035 field.

Challenges along the way



- **Missing records**

- Spotted due to the count of records in the returned files, and due to a “range” of system numbers in our records having no holdings.
- Too many “BadRecs” in one of the files. The entire file was not accepted as a result; unfortunately, this was not reported to us.
- Caused by a lack of 001 field.
- After inquiring, OCLC discovered this and reran the “mystery file”.

Challenges along the way



- **Films on Demand records**
 - Vendor provided
 - Initially, when we downloaded records from them, they would have vendor numbers in 001 and 035 fields. (The vendor eventually worked on fixing their records; newer ones do not have this problem)

Challenges along the way



○ After Reclamation:

- ✦ In preparation for overlaying records, the 001 fields need to match. Some of the FOD records still had the vendor numbers instead, rather than the (ALEPH) system numbers.
- ✦ Ginny was able to help us fix these; most could be matched by a batch process, while some needed to be manually fixed.

Challenges along the way



- No report on the Scan/Delete results
 - This would have been a helpful report for us to use; unfortunately, OCLC doesn't provide such a report with the Reclamation.

Recommendations and Lessons



- Don't rush into deciding on a Reclamation Batchload lightly ; your library only gets one free opportunity.
- Do everything you can to make sure your records are good to begin with.
 - Check for discrepancies in the 001 and 035 fields.

Recommendations and Lessons



- Become familiar with both MS Excel and MarcEdit in advance.
- If you have vendor supplied records, you will need to check if you have permission to upload the records.

Recommendations and Lessons



- Check on the matching report files immediately to make sure that no records were left off.
 - Compare the number of submitted records and the number in the reports.
 - Go through the files, and look for large ranges of system numbers that are not included.

Recommendations and Lessons



- Make sure that you have solid processes in place for adding and deleting records to make sure that changes to your local catalog are reflected in OCLC holdings.