OCLC Syndeo – CBS and CCweb

Martin van Muijen
OCLC Syndeo

Connecting regional OCLC infrastructures with global OCLC infrastructure
OCLC Syndeo

Connecting **regional OCLC infrastructures** with global OCLC infrastructure

**Close integration of CBS**
Continue strong regional presence while enabling all global benefits

**Full transition to the platform**
- Enable regional tasks in WC
- Provide full cloud solution

[Diagram showing integration of CBS with OCLC platform and services like WorldShare, Library and Archives Canada, etc.]
<table>
<thead>
<tr>
<th>institution</th>
<th>main function</th>
<th>related services</th>
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* Hosted by OCLC
OCLC Syndeo

Global OCLC infrastructure

Regional OCLC infrastructures

CBS – Regional Metadata infrastructures

CCweb – CBS Cataloguing web client
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CCweb - Syndeo: regional bibliographic infrastructure with full WorldCat integration
CCweb – CBS Cataloguing Web client

CCweb - Syndeo: regional bibliographic infrastructure with full WorldCat integration
CCweb: CBS Cataloging web client

- Sophisticated web-based title editor combined with UI of CBS publishing platform
- Loosely coupled integration with WMS on browser level with separate logins
- Format agnostic: allows cataloging in UNIMARC, MARC21, Pica3
- Supports all types of bib records and authority records
- Saves records in CBS (master) and in WorldCat
CCweb: integration with WorldCat

- Search in WorldCat for records not found in CBS database
- Saves records first in CBS (master) and then in WorldCat
- Automatic real time synchronization with WorldCat
- Insert of new records in WorldCat without further matching
CCweb – main features

1. Look and feel aligned with Record Manager editor
2. Full support of online cataloguing of single records:
   insert, update, delete of all types of bib records and authority records
3. Integrated handling of bib records, local fields and local holding records
4. Support of record linking functions for linking authority records and bib records
5. Support for coded data input
6. Support for transliteration and bidirectional text editing (left-right and right-left typing)
7. Support for CJK input method(s)
8. Support for transfer of local holding records
9. Support for duplicates analysis
10. Support for all existing CBS catalogue formats: templates for Unimarc, Marc21, Pica3 and text-based
CBS – WorldCat workflow: searching

1. Cataloguer searches in CBS
   - hit: cataloguing action in CBS
   - no hit: user clicks search WorldCat button

2. Search is repeated in WorldCat – results are presented in CCweb:
   a) Multiple hits  ➔ shortlist
   b) Selected or single hits  ➔ WorldCat record is presented in own cataloguing format
   c) No hits  ➔ cataloguing action in CBS
CBS – WorldCat workflow: cataloguing

1. Cataloguer creates / updates bib record, adds local fields and local holdings data
2. CBS validates and inserts full record in CBS database
3. CBS converts record to M21 and sends M21 record immediately to WorldCat
4. WorldCat validates and, if OK inserts record in WorldCat
5. WorldCat return record to CBS
6. CBS adds OCN to bib record in CBS database (if not already there)
7. CBS displays full record in CCweb with OCN

Record with OCN is update; Record without OCN is new record
OCN handling

Shared cataloguing base principle:

Record update is record **improvement**: correction of errors and addition of new fields
never update a bib record into another manifestation!

Cataloguers must now respect this principle in two databases: the CBS union catalogue and WorldCat

For WorldCat records CCweb will present two options: **edit** and **derive**

**edit:** selected bib record is displayed in CCweb edit template **with** (protected) OCN;
CBS sends a record update to WorldCat

**derive:** selected bib record is displayed in CCweb edit template **without** OCN;
CBS sends a new record to WorldCat
Language of cataloguing

WorldCat: parallel records per Language of Cataloguing

Cataloguers must respect this WorldCat feature:

- same language: edit
- other language: derive
1. The book of virtues: a treasury of great moral stories
   Bennett, William J. (William John) (1943-) / 1993
2. The Western canon: the books and school of the ages
   Bloom, Harold / 1st ed. / 1994
3. Prose works
   Selections
   Emerson, Ralph Waldo (1803-1882) Porte, Joel / 1983
4. Mary through the centuries: her place in the history of culture
5. Literature and western man
6. Masters of the drama
7. Goethe; a collection of critical essays
   Lange, Victor (1906-) / 1963
8. The invention of nature: Alexander von Humboldt's new world
   Wulf, Andrea. / First American edition. / 2015
9. Genius: a mosaic of one hundred exemplary creative minds
   Bloom, Harold / 2002
10. Hermann and Dorothea
    Goethe, Johann Wolfgang von (1749-1832) / 199X
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41. Aax Dependability explicit metadata: extended report on properties, policies and exemplary application to case studies
   Gamble, Carl / Newcastle University / 2011

42. Aax Dependability explicit metadata: experimental results and research issues
   Gamble, Carl / Newcastle University / 2011

43. *Aax PDF Explained
   Whittington, John / O'Reilly Media / 2011

44. *Aax Building Hypertext Authoring and Publishing Systems with HTML5 and Node
   Amundsen, Mike / O'Reilly Media / 2011

45. *Aax Advancing education with information communication technologies: facilitating new trends
   Tomel, Lawrence A. / IGI Global (701 E. Chocolate Avenue, Hershey, Pennsylvania, 17033, USA) / 2011

46. *Aax Systems science and collaborative information systems: theories, practices and new research
   Currás, Emilia / IGI Global (701 E. Chocolate Avenue, Hershey, Pennsylvania, 17033, USA) / 2011

   Brundage, Barbara / O'Reilly Media / 2011

48. *Aax Preserving Digital Materials
   Harvey, Ross / 2nd ed / De Gruyter Saur / 2011

49. *Aax REST API Design Rulebook
   Masse, Mark / O'Reilly Media / 2011

50. *Aax Java RMI
   Grosso, William / O'Reilly Media / 2011
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4030 Newcastle upon Tyne : Newcastle University
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4061 ill
4062 30 cm
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4204 Includes bibliographical references
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Error handling

Two error types:

- Validation: errors in the syntax, semantics or contents of a new / updated record
- Timestamp: updated record has not the right timestamp or version number

First: CBS validates and inserts new / updated bib record

Then: WorldCat validates and inserts new / updated bib record

Records with errors can be retrieved in CCweb

errors are displayed in CCweb in cataloguing format

One general error message in CCweb + WorldCat message stored in CBS record
Current status

1. CCweb for Unimarc has been released – available as demo site – tested by Abes – not yet in production

2. CCweb for Pica3 with (ISBD) punctuation – tested by OCLC Leiden

3. CCweb or MARC21 – development kick-off in September

4. CCweb text-based – not planned yet
Not (yet) included

1. Bulk edit scripts
2. User and library administration
3. ILL back-office administration

WinIBW still needed (for the time being)
Thanks

Martin van Muijen