

MOUG Annual Meeting 2013, San Jose, CA  
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## The Transition to WMS: A Cataloger's View from the Middle of Things

[Transition from Matt's presentation]

Before the University Libraries at UNCG began making the transition to WorldShare Management Systems, I had only been through one data migration—and that was years ago from the safe distance of a student assistant's role in the Music Library. Still, even from that perspective the data migration impressed me as something of an epic event. And now, as one of the cataloging librarians currently involved in my library's pioneering move to WMS, experience has confirmed my earlier impression of the epic quality of the data migration experience. So my report to you begins, like an epic, in the middle of things...with the initial preparatory action complete and all forces aligned for the migration itself, which is just underway this month.

# Dining on Data



One reason I call this transition a pioneering move is that UNCG along with UNCC—the other member of our two-institution cohort—is the largest institution yet to join WMS. And, to my knowledge, UNCG's is by far the largest body of musical bibliographic data yet to make its way to WMS...which leads me from time to time to think of our data as this big strawberry on which the intrepid WMS turtle is about to dine. (Thanks to Sonia for this image.)

Just as we at UNCG are in the middle of things with this migration, WMS is also in the middle of things regarding some aspects of its development. Much of the functionality that I and my colleagues need to create full access to our library's musical holdings is in place, but some of this functionality is being developed as we proceed with the migration. Over the last year, and quite feverishly in the last few months, we have been working out solutions to a number of problems. As you will see some of these solutions are more elegant than others.

So, let me describe our experience thus far—and do be prepared for me to leave you with more questions than answers...as we really are in the middle of things.

# Implementation Teams

- UNCG team includes
  - Information Technology Librarian, Chair
  - Heads of Cataloging, Acquisitions, Access Services
  - Representatives from Reference and Special Collections/University Archives
  - Electronic Resources Cataloging Technical Assistant
- OCLC team includes
  - Implementation Manager
  - Data Migration Liaison
  - Additional OCLC staff

To begin, just a bit about the structure of the transition. As you see on the screen, this process is being managed by implementation teams from our library and from OCLC. The teams have been in regular contact and are guided by a Scope Statement based on OCLC's review of the Data Migration Questionnaire our library submitted, as well as OCLC's evaluation of our translation tables.

## Timeline 2013 (1)

### *January*

- Data migration questionnaire
- Translation tables
- User authentication

### *February*

- Delivery of copy of all non-serial bibliographic records
- Mapping of local bibliographic data
- Release review
- Circulation items

### *March*

- OCLC “massaging” our data

And here is part one of the timeline for the data migration, which will involve a total of 6 batchload projects before we go live in June. The first of these projects got underway on February 14, when our Information Technology Librarian extracted some 1.1 million non-serial bibliographic records, as well as nearly 117,000 database and website records and about 3,000 “Child Bound-With Records”—all for delivery to OCLC for the enhanced reclamation batchload project to set holdings and create local holdings for each item.

And this gets into the issue of local notes, which, as I’m sure you are aware has been much under discussion with WMS. We have sent OCLC our non-serial bibliographic records, and they will “massage” these by making local holdings records in WMS terms is our *instance*. Searches from other libraries will not yield our local notes, but those made in [uncg.worldcat.org](http://uncg.worldcat.org)—our instance—will include our local information. More on this in a bit.

## Timeline 2013 (2)

### *April*

- Delivery of serials bibliographic records
- Library ensures OCLC numbers from enhanced batchload are overlaid to records in legacy ILS
- Final patron file

### *May*

- Marketing, testing, preparation for Go Live
- Deliver gap file for processing by OCLC
- Load patron data
- Load circulation transaction files

### *June*

- Live, Live testing
- Shut down SirsiDynix Symphony

### *July-December*

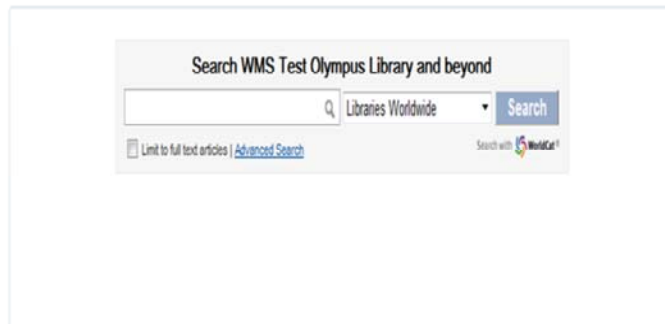
- Status checks/learning the system

I can say less that is very specific about what happens after March. For example, I am not yet sure how our serials bibliographic records are going to be handled. For this and other information, stay tuned until next year when we've made it past the middle of things and have been up and running in WMS for a while.

You'll see that in May we are to deliver a "gap file" to OCLC, which will include all the records modified after February 14th the extraction and delivery. And the status checks and "learning the system" this summer are big deals, as all who will be teaching the system starting in the fall semester will need extensive education themselves to be prepared.

But I want to take you now to the data review process in which we have been engaged this month, to let you see what's up and how it's working.

# Review of Data Display Prior to Load Production



Here is our test search box.

In WMS what you see of WorldCat Local comprises 3 sources: the master bibliographic record, the local bibliographic data, and the local holdings record. Of course any editing of the master record must be done in OCLC to the master record itself. And, as you are probably well aware, only parts of the master record display in WorldCat Local. (More on this and much else, I'm sure, in tomorrow's WCL session.) The inclusion of local bibliographic data is a fairly recent solution to this limited WCL display from the master record.

Regarding this local bibliographic data, WMS has only programmed certain fields to be included. One of our library's central concerns as we entered the process was that our local data remain intact through the migration and display effectively for our patrons. So our request for Local Bibliographic Data was more complex than that of the other institutions that have migrated to WMS before us. In response to our request, OCLC loaded a sample file in order for us to have an opportunity to review the data before the production load was completed. We delivered to OCLC 200-300 sample records that were representative of our requirements. Then, after these sample records were batchloaded, we had 10 days to review the WorldCat Local display by means of the WMS test search you see on the screen to determine whether this met our needs.

## Local Data Cross Reference Report

### Local Bib data fields in records

130 Uniform title  
246 Varying form of title  
362 Dates of Publication and/or  
Sequential Designation  
502 Dissertation  
505 Formatted contents note  
506 Restrictions on access  
510 Citation/Reference  
515 Numbering peculiarities note  
522 Geographic coverage  
524 Preferred Citation of Described  
530 Additional Physical form

### Local Bib data fields selected

240 Uniform title  
730 Added entry uniform title  
698 Local subject added entry—  
Meeting name  
500 General note  
596 Local note  
592 Local note  
500 General note  
500 General note  
500 General note  
592 Local note  
500 General note

Data such as local subject headings and notes now display to users in WCL. However, we have needed to do extensive testing to see which fields display in WCL and which do not. So, on the one hand there is added functionality available here, but on the other this added functionality applies only to some fields. As a consequence of this our Head of Cataloging had some extensive cross-referencing to do, mapping local bibliographic data fields in our records to selected fields currently available in WorldCat Local, and adding additional fields to the local bibliographic data translation table.

## Local Data Cross Reference Report

<b>Local Bib data fields in records</b>	<b>Local Bib data fields selected</b>
534 Original version	500 General note
539 Data Elements of Reproduction	500 General note
540 Terms Governing Use	592 Local note
541 Immediate Source of Acquisition	591 Local note
542 Information Relating to Copyright Status	592 Local note
544 Location of other archival materials	592 Local note
545 Biographical or historical	595 Local note
550 Issuing Body	500 General note
555 Index/Finding Aids	500 General note
561 Ownership/ Custodial History	592 Local note

And I thought you would like to see the extent of this mapping. Our hope is that in time the display of information from the master record will be comprehensive, and that there will be a way to return transferred data to its original field, as we don't want it showing up twice in the display.



## Local Data Cross Reference Report

### Local Bib data fields in records

563 Binding information  
580 Linking entry complexity  
581 Publications about described materials  
740 Uncontrolled related title  
752 Added entry hierarchical place name  
780 Preceding entry  
785 Succeeding entry  
830 Series added title

### Local Bib data fields selected

593 Local note  
598 Local note  
500 General note  
793 Added entry uniform title  
797 Added entry corporate name  
791 Added entry corporate name  
792 Added entry meeting name  
730 Added entry uniform title

And here is the last of mapping. You'll note here our concern with fields extensively used in archival records, of which we have a great many. Now let's look at a couple of examples.

## Examples from the Test: Field 533

099 \$a GREENHOUSE \$a BOX \$a 24-6  
049 \$a NGUS  
100 1 \$a Berlioz, Hector, \$d 1803-1869.  
240 10 \$a Roméo et Juliette. \$p Strophes  
245 10 \$a [Cello part, Erstes Entzücken = \$b Premiers transports = Love's first sweet kiss / \$c Hector Berlioz].  
246 30 \$a Erstes Entzücken  
246 31 \$a Premiers transports  
246 31 \$a Love's first sweet kiss  
260 \$c [197-?]  
300 \$a [1] p. of music ; \$c 35 cm.  
500 \$a Violoncello part from the arrangement of the strophes for alto, violoncello, and harp or piano; accompaniment originally for orchestra.  
500 \$a Title supplied by cataloger.  
533 \$a Photocopy. \$b [s.l. : \$c s.n., \$d 19--] \$e 35 cm. \$n Reproduction has been trimmed to include cello part only from p. 6(74)-10 (78) in v. 4 of Hector Berlioz's Songs with piano accompaniment : complete in six volumes. New York : E.F. Kalmus, 197-. Kalmus ; Publisher's no. 1234. Individual lines of the photocopied cello part have been enlarged and taped to stiff paper. Copy also includes enlarged photocopies of p. 2(70)-(73) with additional trimmed lines of piano and vocal music from the score. Cello part includes performance notes in the hand of Bernard Greenhouse.  
500 \$a Publication information supplied by cataloger based on OCLC record no. 4015131; source in publisher number also assumed.  
590 \$a 758453  
650 0 \$a Songs (Medium voice) with instrumental ensemble \$v Parts.  
650 0 \$a Symphonies \$v Excerpts, Arranged \$v Parts.  
700 1 \$a Greenhouse, Bernard, \$d 1916-2011.  
740 0 \$a Songs with piano accompaniment.

Here is an example of a record with crucial data contained in field 533. When we noted that this did not display in the first test run, we sounded the alarm. The OCLC implementation team made the adjustment....

# 533 Now Displays

OCLC Number: 824619429

Notes: Violoncello part from the arrangement of the strophes for alto, violoncello, and harp or piano; accompaniment originally for orchestra.  
Title supplied by cataloger.  
Publication information supplied by cataloger based on OCLC record no. 4015131; source in publisher number also assumed.

**WMS Test Olympus Library notes:**

Photocopy. [s.l. : s.n., 19--] 35 cm. Reproduction has been trimmed to include cello part only from p. 6(74)-10(78) in v. 4 of Hector Berlioz's Songs with piano accompaniment : complete in six volumes. New York : E.F. Kalmus, 197-. Kalmus ; Publisher's no. 1234. Individual lines of the photocopied cello part have been enlarged and taped to stiff paper. Copy also includes enlarged photocopies of p. 2(70)-(73)5 with additional trimmed lines of piano and vocal music from the score. Cello part includes performance notes in the hand of Bernard Greenhouse.

758453

Description: [1] p. of music ; 35 cm.

Other Titles: Songs with piano accompaniment.  
Roméo et Juliette.  
Erstes Entzücken  
Premiers transports  
Love's first sweet kiss

And here you can see that the 533 is on display in a second test review of this record.

## Examples from the Test: Field 830

Details	
Genre/Form:	Periodicals
Additional Physical Format:	Godey's magazine (OCoLC)9890157
Material Type:	Periodical
Document Type:	Journal / Magazine / Newspaper
OCLC Number:	8275858
Notes:	Title from caption.  <b>WMS Test Olympus Library notes:</b> Microfilm. Ann Arbor, Mich. : University Microfilms. 3 microfilm reels ; 35 mm. (American periodical series, 1800-1850 ; 878-880). Vol. 125 (Oct. 1892)-v. 137 (Aug. 1898) = no. 745-818.
Description:	13 v. : ill. (some col.) ; 25 cm.
Series Title:	<u>American periodical series, 1800-1850, 878-880.</u>
Other Titles:	Godey's American periodical series, 1800-1850.
Local System Bib Number:	ocm08275858

In the initial test we observed a small detail here—no display of the subfield in field 830. Now, you see it on display here—but only because I did not capture a screen shot during the first review. So you are looking at the problem corrected. In the first test the numbers 877-880—which are crucial for access—were not displaying. That problem has now been solved, as have many others...the arrow points to the subfield information that was not displaying when we made the first test.

(Tell the 541 story, Rosann, Coleman ?).

## Examples from the Test: Uniform Titles

100 1 \$a Haydn, Joseph, \$d 1732-1809.  
240 10 \$a Concertos, \$m oboe, orchestra, \$n H. VIIg, \$r C major  
245 00 \$a Oboe concerto in C major. \$h [sound recording]  
262 \$b Dover \$c 97283-6. \$d [1967]  
300 \$a on sides 1 and 2 of 1 disc. \$b 12 in. \$c 33 1/3 rpm. stereo.  
500 \$a Attributed to Haydn.  
500 \$a Program notes by Denis Stevens on container.  
501 \$a With: Purcell, H. Fantasias, 3-7 viols. No. 1-3.  
511 \$a Péter Pongrácz, oboe; Hungarian Radio and Television Symphony Orchestra; János Sándor, conductor.  
650 0 \$a Concertos (Oboe)  
700 12 \$a Purcell, Henry, \$d 1659-1695. \$t Fantasias, \$n Z. 732-734.  
700 11 \$a Pongrácz, Péter.  
700 11 \$a Sándor, János, \$d 1933-  
710 21 \$a Magyar Rádió és Televízió Szimfonikus Zenekara.  
740 00 \$a Dover 97283-6

As a music cataloger, I find that the most significant issue is with the serious limitation of the uniform title display. This information is of course crucial for access, and it needs to display in its entirety. This is obviously the case in records that contain multiple uniform titles, as well.

Consider the record on the screen: Haydn composed a great many concertos, and we simply have to be able to distinguish between them if we are going to meet the needs of researchers. And while there is no formal relationship between the fantasias of Purcell and this concerto of Haydn's—all of these works have been recorded on this LP, so we have to deal with this effectively.

## Examples from the Test: Uniform Titles

The screenshot shows a library catalog record for "Oboe concerto in C major". The title is at the top. Below it, the author information is listed as "Joseph Haydn; Henry Purcell; Páter Pongrácz; János Sándor; Magyar Rádió és Televízió Szimfonikus Zenekara". The word "Haydn" is circled in red. The edition/format is "Music LP : Concertos : English". To the right, there are sections for "More like this" and "Subjects". The "Subjects" section lists "Concertos (Oboe)", "Concertos (Oboe) -- To 1800", and "Carous, fugues, etc. (Strings) - To 1800". At the bottom, there is a link to "Find a copy in the library" and the text "WMS Test Olympus Library".

**Oboe concerto in C major**

Author: [Joseph Haydn; Henry Purcell; Páter Pongrácz; János Sándor; Magyar Rádió és Televízió Szimfonikus Zenekara](#)

Edition/Format: [Music LP : Concertos : English](#) [View all editions and formats](#)

More like this

Subjects

- [Concertos \(Oboe\)](#)
- [Concertos \(Oboe\) -- To 1800](#)
- [Carous, fugues, etc. \(Strings\) - To 1800](#)

[Similar Items](#)

[Find a copy in the library](#)

WMS Test Olympus Library

Here is the first bit of information as it displays in WorldCat Local; the composers are missing their dates and are not distinguished from the other “authors.” “Concertos” here is generated by the fixed field “Comp”.

## Examples from the Test: Uniform Titles

**Details**

<b>Material Type:</b>	Music
<b>Document Type:</b>	Sound Recording
<b>All Authors / Contributors:</b>	<a href="#">Joseph Haydn</a> ; <a href="#">Henry Purcell</a> ; <a href="#">Péter Pongrácz</a> ; <a href="#">János Sándor</a> ; <a href="#">Magyar Rádió és Televízió Szimfonikus Zenekara</a> .
	<input type="text" value="Find more information about: Joseph Haydn"/> <input type="button" value="Go"/>
<b>OCLC Number:</b>	644965
<b>Notes:</b>	<b>WMS Test Olympus Library notes:</b> Attributed to Haydn. Program notes by Denis Stevens on container. With: Purcell, H. Fantasias, 3-7 viols. No. 1-3.
<b>Performer(s):</b>	Péter Pongrácz, oboe; Hungarian Radio and Television Symphony Orchestra; János Sándor, conductor.
<b>Other Titles:</b>	Concerto, Concertos, Dover 97283-6
<b>Local System Bib Number:</b>	ocm00644965

Further down in the display we see “Concertos” from subfield \$a of MARC 240. But this is really no help at all without the specific information that tells us exactly which of Haydn’s many concertos we are dealing with here. And to compound the problem, there is no display generated by the controlled information in field 700, and thus no uniform title for the Purcell Fantasias. The cataloger has provided a note regarding the fantasias, but that is no substitute for the uniform title.

## Uniform Titles (OCLC: 644965)

What is crucial to display:

100 1 \$a Haydn, Joseph, \$d 1732-1809.

240 10 \$a Concertos, \$m oboe, orchestra, \$n H. Vllg, \$r C major

700 12 \$a Purcell, Henry, \$d 1659-1695. \$t Fantasias, \$n Z. 732-734.

What currently displays:

Joseph Haydn

Henry Purcell

Concertos

So, on the screen you see the problem in short—and it would be hard to exaggerate the significance of this. Examples could be multiplied.

So, let me conclude by saying that the pioneering work we are doing with OCLC's WorldShare Management Systems is very interesting for many reasons, not the least of these being the window this whole process opens on the future. As I've already said today, stay tuned on this. And my hope is that our pioneering effort will map directions that other institutions might follow through some of the knotty thickets along the way, such as that of the uniform title display problem I've just described.