



OCLC CatExpress

All DASites who will have schools subscribing to the OCLC CatExpress service will need to do the following to prepare for automated daily loading of OCLC CatExpress records.

As schools subscribe to the OCLC CatExpress service with INFOhio Central, INFOhio Technical Services will notify each DASite of their buildings that have subscribed. Sites that participated in the CatExpress Pilot will already have some of the files built, but should review and update them.

If you have a question about any of the steps please post a note in Forum for INFOhio Technical Services to answer.

DASite set-up for processing OCLC CatExpress records

- 1) Implement Version 1.2 of the T_OCLC Conversion Table for OCLC CatExpress records.
 - a) DASites have an updated NOACSC version of the T_OCLC.TBL file in the INFOHIO_ROOT:[EXAMPLES] directory. Copy this table to your LIS_TAB directory.
 - b) Customize the dictionary section that translates Location/Collection codes for your schools.

DASites that previously participated in the CatExpress Pilot will need to replace the dictionary sections of the NOACSC table with the dictionary sections from your old T_OCLC.TBL file. Make any additions needed for new schools who may subscribe to CatExpress.

DASites who are new to CatExpress will need to remove our dictionary sections and create new dictionary translations specific to the schools at your site who subscribe to CatExpress.

Edit the new T_OCLC.TBL file and search for the word "begin". That should take you to this area of the table:

```
\* BEGIN DICTIONARY CUSTOMIZATION FOR LOCATION/COLLECTION CODES - TLS
\* CUSTOMIZATION WITH YOUR CODES IS NECESSARY HERE. REMOVE MY FOWLING
\* LINES AND INSERT THE LINES CUSTOM TO _YOUR_ DAS!

\* Findlay HS
   "<BFNHS<CVC"           "<bFNHS<cVC"
   "<BFNHS<CCP"           "<bFNHS<cCP"
   "<BFNHS<CBK"           "<bFNHS<cBK"
   "<BFNHS<CFM"           "<bFNHS<cFM"
   etc.
   etc.
```

You want to select lines for removal beginning with the line:

```
\* Findlay HS
```

up to but not including the line that says:

```
\* END LOCATION/COLLECTION DICTIONARY CUSTOMIZATION - TLS
```

After removing these lines from the new table, you need to insert lines for each of your schools subscribing to CatExpress. You want to include a translation for each valid MultiLIS library location/collection that they have. You'll notice that both the left and right side above are the same except that the subfield codes 'b' and 'c' _MUST_ be in uppercase on the left side and in lowercase on the right side.

Your schools are suppose to be using their MultiLIS codes when cataloging the 852 \$b location code and 852 \$c collection codes at OCLC. Therefore, you should establish all their valid location table codes in this dictionary section.

- c) Customize the dictionary section which translates collection codes into Document Types (TXTMED*) for your schools. While editing the T_OCLC.TBL file search a second time for the word "begin". That should take you to this area of the table:

```
\* BEGIN TXTMED CUSTOMIZATION - TLS
\* CUSTOMIZATION WITH YOUR CODES IS NECESSARY HERE. REMOVE MY FOWLING
\* LINES AND INSERT THE LINES CUSTOM TO _YOUR_ DAS!
"<c920"          "Collective biography"
"<c921"          "Biography"
"<c92"           "Biography"
"<cA"           "Atlas"
"<cARH"         "Art History"
etc.
etc.
```

You want to select lines for removal beginning with the line:

```
"<c920"          "Collective biography"
```

up to but _not_ including the line that says:

```
\* END OF TXTMED CUSTOMIZATION SECTION - TLS
```

After removing these lines from the table, you want to insert new lines that will translate the 852 subfield 'c' collection code into the correct text for your Document Types. You want to make sure that you have a match for the collection codes you identified in the earlier dictionary section. Most likely you can cut and paste the Dictionary section for TXTMED processing from one of your other tables (ex: T_BROD.TBL, T_FOLL.TBL or Pilot sites from your old T_OCLC.TBL). Do verify that all collections found in the Location/Collection Dictionary section are translated as you desire in this TXTMED section.

- d) OPTIONAL 520 processing. If you have previously been loading the contents of the 520 tag (summary, abstract, annotation) into a MultiLIS Keyword field (ZONDESC*) so that the contents of 520 are searchable via an OPAC Keyword search, and you wish to continue doing so, you'll need to comment/uncomment the optional section of code which does this, depending on what you want to do. While editing the table, search for the words "OPTIONAL 520". Which should take you to this section:

```
\*OPTIONAL 520 - This section is optional if you wish to use it - TLS
\* Load the contents of the 520 tag into the MultiLIS field ZONDESC* so
\*that those content notes are searchable thru a Descriptor search.
\*REMOVE THE '\*' ON THE FOLLOWING LINES TO MAKE THIS RULE ACTIVE.
\*"520" {
\* "520":
\* "520" ".*"          ""          "&" /tocc=curr
\* "ZONDESC*":
\* "520" "<a([>]+)"    " : ; / . , - * "    "\1" /tocc=curr
```

```

\* "ZONDESC*":
\* "520" "<b([>]+)" " ;/.,-* " "\1" /tocc=curr
\*}
\*END OF OPTIONAL 520 SECTION - THIS LINE MUST REMAIN COMMENTED OUT

```

To make the rule active, remove the "*" at the beginning of the command lines. Comment lines _must_ remain commented out!

- e) OPTIONAL 600 processing. If you have previously been creating a MultiLIS Descriptor entry (ZONDESC*) for any 600 tag (subject - personal name) in the bib record so that searching by PS= in the OPAC is functional, and you wish to continue doing so, you'll need to comment/uncomment the optional section of code which does this depending on what you want. While editing the table, search for the words "OPTIONAL 600". Which should take you to this section:

```

\*OPTIONAL 600 - This section is optional if you wish to use it - TLS
\*96-01-14
\*Person-as-subject keywords: will create a tag "ZONDESC" for each
\*tag 600 (Subject-person), subfield a h c q d, found in a given bib.
\*record as well as keeping the original 600 in the bib record.
\*Adds the necessary entry for the PS= searching in the OPAC on records
\*processed by this conversion.
\*REMOVE THE '*' ON THE FOLLOWING LINES TO MAKE THIS RULE ACTIVE.
\*"600" {
\* "ZONDESC*":
\*"600" "<[ahcq d]([>]+)" " " "P=\1" /toc=curr/mocc=first
\*"600" "<[ahcq d]([>]+)" " " " \1" /tocc=curr/mocc=notfirst
\* "600":
\*"600" ".*" " " "&" /tocc=curr
\* }
\*END OF OPTIONAL 600 SECTION - THIS LINE MUST REMAIN COMMENTED OUT

```

To make the rule active, remove the "*" at the beginning of the command lines. comment lines _must_ remain commented out!

- f) Check that the protection on the T_OCLC.TBL file is set correctly.

Directory MULTILIS:[TAB]

T_OCLC.TBL;1 (RWED,RWED,RWE,RE)

- 2) Each DASite will need to create a file called OCLC_MAIL.DAT in the INFOHIO_ROOT:[SITE_SPECIFIC] directory.

This simple file should contain the branch name followed by a colon and the username(s) who should receive notification when CatExpress records requested by the building are loaded.

NOTE: *This file is different from the UC_OCLC_MAIL.DAT file used when Union Catalog OCLC Request records are filled!*

Here is a sample OCLC_MAIL.DAT file:

```

FNDO:FN_HARDESTY, FN_MA_MILLER
FNGL:FN_HARDESTY, FN_B_FOX
FNHS:FN_HARDESTY, FN_HILL
LMAL:LM_COLE, LM_WOODWARD
LMEC:LM_COLE, LM_WOODWARD
LMED:LM_COLE, LM_WOODWARD

```

```

LMEM: LM_COLE , LM_WOODWARD
LMFR: LM_COLE , LM_WOODWARD
LMHM: LM_COLE , LM_WOODWARD
LMHS: LM_MCNEAL
LMIV: LM_COLE , LM_WOODWARD
LMJF: LM_COLE , LM_WOODWARD
LMLW: LM_COLE , LM_WOODWARD
LMNO: LM_COLE , LM_WOODWARD
LMRO: LM_COLE , LM_WOODWARD
LMSO: LM_COLE , LM_WOODWARD
LMWA: LM_COLE , LM_WOODWARD
LMWE: LM_COLE , LM_WOODWARD
LMWH: LM_COLE , LM_WOODWARD
LMWW: LM_COLE , LM_WOODWARD

```

Note that each bank may have more than one entry.

The ownership and protection should be set as follows:

```

$ DIR/SEC INFOHIO_ROOT: [SITE_SPECIFIC]UC_OCLC_MAIL.DAT
      OCLC_MAIL.DAT;1      [OECN_INFOHIO]      (RWED ,RWED ,RWED , )

```

As stated above, this file should contain the usernames of specific MultiLIS users in each building at your DAS. It will be used each day to distribute the load reports for CatExpress records that a library exported from OCLC the previous day. The OCLC_MAIL.DAT file should contain the username(s) of the individuals who will be reviewing and acting upon the information in the load reports as needed.

Schools are to supply email addresses on the subscription form and this information will be shared with you. However, you probably still need to check with the library to see if they have additional users who should receive the email. Simply by editing the file, it is always possible for you to add/delete people from the list.

NOTE: It is not necessary to include the DASite Staff in the OCLC_MAIL.DAT file. Notifications to DAS staff will be sent to the INFOHIO\$OCLC_DASMAIL logical as defined in the INFOHIO_LOGICALS.COM file. See step 3 below.

- 3) Update/define INFOhio logicals for the OCLC CatExpress process.
 Edit INFOHIO_ROOT:[SITE_SPECIFIC]INFOHIO_LOGICALS.COM
 - a) The logical INFOHIO\$OCLC_DASMAIL defines the specific INFOhio DASite staff (or distribution list at your site) who should receive copies of the CatExpress load messages. Example, at NOACSC we use INFOHIO_LIAISONS to send email to Susan, Charles, Jean and Terri.. Example:


```

$ DEFINE/SYSTEM INFOHIO$OCLC_DASMAIL "INFOHIO_LIAISONS"

```

or

```

$ DEFINE/SYSTEM INFOHIO$OCLC_DASMAIL "SUSAN,TERRI,JEAN,CHARLES"

```

Define this logical specific to your site using a mail distribution list or individual names as you wish.
 - b) The loading of CatExpress records occurs in batch. The logical INFOHIO\$OCLC_QUEUE defines the specific batch queue to be used. At NOACSC we use DREGS\$BATCH. Define this logical specific to your site.

NOTE: This logical is also used by the UC_OCLC process which distributes filled Union Catalog OCLC Request records.

For example, we use:

```
$ DEFINE/SYSTEM INFOHIO$OCLC_QUEUE DREGS$BATCH
```

- c) The ownership and protection on this file should be set as follows:

```
$ dir/sec infohio_root:[site_specific]infohio_logicals.com
INFOHIO_LOGICALS.COM;7      [OECN_INFOHIO]      (RWED,RWED,RWED,)
```

- d) Execute the INFOHIO_LOGICALS.COM file.

- 4) Check ownership and protection of the command files used to load the CatExpress records. They should be set as follows:

```
$ dir infohio_root:[system]oc*.com/sec
OCLC_LOAD.COM;8      [OECN_INFOHIO]      (RWED,RWED,RWED,)
OCLC_LOAD_FILE.COM;9  [OECN_INFOHIO]      (RWED,RWED,RWED,)
```

- 5) Check ownership and protection of the INFOHIO_ROOT:[OCLC] directory where the OCLC distribution files will be placed. If the directory does not exist you will need to create it. The security should be set as follows:

```
$ dir infohio_root:[000000]oclc.dir/sec
OCLC.DIR.1          [OECN_INFOHIO]      (RWED,RWED,RWE,)
```

- 6) NOACSC will retrieve all CatExpress records exported for a given day from OCLC at 7:10 am the following morning. A building's records will then be distributed to their appropriate DAS. Each DASite should use DEC Scheduler to schedule a batch job for the OCLC_LOAD.COM procedure.

The job should be scheduled to run sometime after 7:30 am when the files have been distributed to all sites. You also need to plan this to run after your usual backup time so that the centrals are up and running.

Here is an example of our job in DEC Scheduler:

Job Name	Entry	User_name	State	Next Run Time
OCLC_LOAD	29	TERRI	Scheduled	8-OCT-1999 07:34
VMS_Command : @INFOHIO_ROOT:[SYSTEM]OCLC_LOAD *				
Group : INFOHIO		Type : (none)		
Comment : Daily load of any downloaded files from OCLC				
Last Start Time :		7-OCT-1999 07:34		
Last Finish Time :		7-OCT-1999 07:34		
Schedule Interval :		D07:34:00.00		
Mail to :		TERRI,MICHAEL,JEAN (Always)		
Days :		ALL		
Output File :		OCLC_LOAD.LOG		
Cluster_CPU :		Default		
				Notify user upon completion

Records loaded from CatExpress will result in some reports being sent to you. The first is a "journal" report which is created prior to the loading of the records. It will provide detailed reasons why _item_ records will not be loaded. This report is produced as a result of getting the records _ready_ for loading into the MultiLIS database. Its contents are described below.

A second report is the usual "sortie" which will report the bib record numbers for the items that did not load but will not tell you why the items did not load. Other problems may also be reported on the sortie report that are not reported on the journal file. The sortie report is produced as a result of actually loading the records to the database while the journal report is produced as a result of getting the records ready to load.

You should examine the sortie to identify all load problems that need addressed. The journal report will be helpful in creating/modifying the item record. It may also be of assistance, in identifying cataloging omissions made by the user while in CatExpress.

Following is an Explanation of the "Journal" report that resulted when the CatExpress MARC record file was converted using the T_OCLC.TBL

CATEXPRESS JOURNAL REPORT

Following is a sample of what the Journal report could look like.

Following this sample is an explanation of each problem the journal report identifies and the suggested action to be taken by you.

SAMPLE---

```
newtape conversion parameters
application           : n852 data
rule table:
  PEACH:[NOACSC.SHUTT.OCLC]t_n852.tbl
output catalogue load file : n852.c
output journal file       : n852.j
record loading mode       : I
bibliographic record number is always left blank
Input records are in MultiLIS MARC format
** processing input file xb_marc_dry.c:

I-- record 1: Record accepted
      Title: $aFirst among the Hurons /$c[by] Max Gros-Louis. I
D=> record 2: Item not loaded - Dict. translation missing for $b loc./$c coll.
      $BLMWA$CPROF$h362.2 DRU v.1$jv.1$p06511423x
      Title: $aDrug prevention for early childhood.
E-> record 3: Item not loaded - missing $b location
      $hFIC DIN$p32620065113422$aL7GQ$cFIC
      Title: $aDinosaur ducks.
E-> record 4: Item not loaded - missing $c collection
      $hFIC PAR$p32620065007472$aL7GQ$bLMWA
      Title: $aJunie B. Jones is not a crook /$cby Barbara Park
W== record 5: Item without $h call number info
      852 $bLMWA$cFIC$p06511750x$2399
      Title: $aJunie B. Jones is a party animal /$cby Barbara P
E-> record 6: Item not loaded - missing $p barcode
      $hFIC MAR v.2$aL7GQ$bLMWA$cFIC$jv.2
      Title: $aBaby-sitters little sister school scrapbook /$cA
E-> record 7: Item not loaded - missing $b location/$c collection/$p barcode
      $aL7GQ
      Title: $aDreams /$cby Nancy Coleman, Joan Wilson, and Ell
I-- record 8: Record accepted - No items
      Title: $aOCLC ILL Direct Request Service planning guide.

R:> record 9: Rejected - marked for deletion
      *rejected record*
```

```

I01-
00615dam 2200217Ia 450
001 ocm34952324
003 OCoLC
005 19980918131645.0
008 960619s1996 nyu j 000 1 eng d
010 $a 95096106
020 $a0380783185 (pbk.) :$c$$3.99
020 $c$$3.99
040 $aEOW$cEOW$dLMP
049 $aL7CG
092 $aFIC$bMCA
1001 $aMcArthur, Nancy.
24514$aThe mystery of the plant that ate dirty socks /$cNancy McArthur.
260 $aNew York, N.Y. :$bAvon Books,$cc1996.
300 $a154 p. ;$c20 cm.
500 $a"An Avon Camelot book."
852 $aL7CG$bLMFR$cFIC$iMCA$p32620035097994

```

```

E-> record 10: Item not loaded - missing $p barcode
      $hBRO$aL7CG$bLMFR$c32620035098125
      Title: $aArthur's teacher trouble /$cMarc Brown.

```

number of input records: 10

EXPLANATION OF JOURNAL MESSAGES AND SUGGESTED ACTIONS

E-> This is an error. Although the bib record was loaded, the item couldn't be loaded because some of the required pieces of information were missing (the 852 \$b, \$c and \$p must all be present for the item to be accepted).

ACTION: From the MultiLIS Cataloging or Circulation menu select ADD ITEMS to manually add your item record.

W== This is a warning. The bib and item were loaded, but there is a condition in the item record that you most likely will want to correct.

ACTION: From the MultiLIS Cataloging or Circulation menu select UPDATE ITEMS to correct the item.

I-- This is an informational message. There are two types of informational messages.

Record accepted - No items

Typical message when only the bib record and no item record was cataloged at OCLC. Since you do not have to catalog the item at OCLC and some prefer to add the item information in MultiLIS, it is assumed you are probably aware that only the bib information is loaded.

ACTION: From the MultiLIS Cataloging or Circulation menu select ADD ITEMS to manually add the item.

Record accepted

Typical message when all required subfields of the 852 tag are present, and there were no problems converting the data.

ACTION: No action required.

D=> This is a Conversion Dictionary translation problem. The dictionary does not translate the 852 \$b (general location code) and \$c (collection code) for your branch. The bib record was loaded, but the item record was not.

ACTION: From the MultiLIS Cataloging or Circulation menu select ADD ITEMS to manually add the item.

So that these item records will be loaded in the future, contact your support person at the DAS and tell them the general location and collection code that did not load but should have. The support person at the DAS can modify the dictionary so the correct translation can occur during future loads.

R:> This indicates a record was marked for deletion at OCLC. Although INFOhio Sites do not need to delete holdings from OCLC this condition could exist if the "delete holdings" box was accidentally selected OR if a record cataloged was later determined to be the incorrect record and it was therefore deleted.

In the first example nothing will happen. It is not possible to Delete MultiLIS records without the MultiLIS record number. It will simply be reported in the journal report that a record was deleted at OCLC. No action is necessary.

In the second example, the original record will be loaded. The fact that it was then deleted at OCLC will NOT result in it being deleted in your MultiLIS database. You will have to delete the record manually from "Create and Update Bibliographic Records," "Delete Records."

ACTION: From the MultiLIS Cataloging menu select CREATE AND UPDATE to access the item record and delete it. It will then be possible to select DELETE BIBLIOGRAPHIC RECORDS and the bib record can be deleted if there are no other holdings attached.

CATEXPRESS ACCOUNTING REPORT

Schools will subscribe to CatExpress for a specific number of records. INFOhio will be keeping track of all the balances as far as the quantity purchased, quantity used and quantity still available. An accounting report will be created for each school district and sent to specific users within the district. The report will look similar to this:

Accounting report...

```
044222 1999/10/11 +001500 !Beginning Balance
L7FKLMP NOACSC LMLW 044222 1999/10/12 -000001 !OCLC distribution
L7FKLMP NOACSC LMLW 044222 1999/10/13 -000018 !OCLC distribution
L7FKLMP NOACSC LMLW 044222 1999/10/14 -000055 !OCLC distribution
L7CGLMP NOACSC LMFR 044222 1999/10/15 -000005 !OCLC distribution
L7C3LMP NOACSC LMHM 044222 1999/10/15 -000021 !OCLC distribution
L7FKLMP NOACSC LMLW 044222 1999/10/15 -000034 !OCLC distribution
L7GMLMP NOACSC LMWA 044222 1999/10/15 -000001 !OCLC distribution
L7G9LMP NOACSC LMWW 044222 1999/10/15 -000001 !OCLC distribution
L7FKLMP NOACSC LMLW 044222 1999/10/16 -000001 !OCLC distribution
L7ACLMP NOACSC LMSO 044222 1999/10/16 -000003 !OCLC distribution
L7JOLMP NOACSC LMWH 044222 1999/10/16 -000006 !OCLC distribution
L7FKLMP NOACSC LMLW 044222 1999/10/19 -000001 !OCLC distribution
L7AYLMP NOACSC LMWE 044222 1999/10/21 -000067 !OCLC distribution
LMPALMP NOACSC LMHS 044222 1999/10/23 -000004 !OCLC distribution
LMPALMP NOACSC LMHS 044222 1999/10/26 -000012 !OCLC distribution
L7AYLMP NOACSC LMWE 044222 1999/10/26 -000051 !OCLC distribution

044222 1999/10/26 1219 <- Balance
```