

# WISCAT HOLDINGS UPDATE METHODS

Wisconsin libraries have several options for participating in the WISCAT resource sharing system.

- A) They can maintain their holdings in the WISCAT physical union catalog. Union catalog holdings may be maintained either through batch loading or interactive online updating.
- B) They may participate in resource sharing by allowing a virtual Z39.50 connection into their local catalog.

Libraries may use any or all of the following methods to participate in resource sharing activities through WISCAT.

| Method                                   | Process  | Local Cost                                 | Local Labor   | WISCAT Staff Labor   | Holdings Appear in WISCAT   | Comments   |
|--|--|--|---|--|---|--|
| <b><i>Batch Holdings Replacement</i></b> | Library submits an exported file of their entire collection from local catalog to be matched against WISCAT. | No cost to send or add holdings to WISCAT. | Library staff must export file from local catalog, FTP the file to WISCAT, and notify WISCAT staff when a file has been sent. | Holdings are built from item record call numbers, inserting library ID.<br><br>File is matched against WISCAT. Library's existing holdings are dumped and replaced with new data. Non-matching records may be reviewed, batch-edited and rerun again as updates. | Holdings replacement is recommended at least annually or semiannually, at the discretion of the local library or consortium.<br><br>Initial data replacement is normally done within two weeks of submission. | Holdings for individual issues of serials are generally removed from the file before loading.<br><br>Selected non-matching bib records are added to WISCAT, depending on completeness & quality of cataloging and whether or not the holdings are also available via Z39.50. |

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|---|--|--|---|---|---|---|
| <b>Batch Holdings Update</b> <ul style="list-style-type: none"> <li>Files from vendors</li> <li>Adds or deletes exported from local catalog</li> <li>Exported OCLC records</li> </ul> | Library sends files of MARC records for newly acquired or recently deleted titles. Files are generally sent as email attachments or on diskette. | No cost to send or add or delete holdings from WISCAT.   | Library sends copies of files or original diskettes. May also export MARC records for withdrawals and send as separate files. | Holdings are built from item record call numbers, inserting library ID. File is matched against WISCAT, adding holdings to library's existing holdings. Non-matching bib records are added. | Monthly<br><br>Libraries may submit at any frequency they desire. Most libraries choose to do this weekly or monthly. | Libraries may submit files of MARC records to delete, but must instruct the WISCAT staff to DELETE them instead of ADD.   |
| <b>Online Holdings Maintenance</b>  | Library staff locates individual records in WISCAT, enters call number, or modifies or deletes the holding, saving it directly to the catalog.   | \$200/year for online license  | Matching individual records is labor-intensive but less burdensome if downloading records for local use at the same time.     | Training/technical support is provided to local libraries.  | Immediately   | Holdings update options available only on records found in the union catalog.<br><br>Library might choose to send adds via batch update & do deletes online, making batch holdings replacement unnecessary. |
| <b>Z39.50 Access to local catalog</b>   | If library has a Z39.50 compatible server, the WISCAT Z Gateway can be configured to access & search that server & to create ILL requests.       | Local vendor cost for Z39.50 server software can be significant; No additional cost to add as a Z39.59 host in WISCAT. | No additional local labor; occasional troubleshooting or consultation may be required as local configurations change.         | Initial setup can be labor-intensive. Then requires routine monitoring as local hardware, software, IPs or firewalls can change.  | Immediately<br><br>Allows users to see "current shelf status" if that output is supported by the local host.          | Many libraries add holdings to the union catalog in addition to providing Z39.50 access. Users may find the search capabilities in the union catalog are superior to Z39.50 searching functionality.        |