

# CORC at Cornell

## Internal Implementation Plan

### Fall-Winter 2001-2002

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**Submitted by: KSC**

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## 1.0 Scope

This document proposes an implementation plan for using CORC in production workflows at Cornell. It is a follow-up to the CORC at Cornell team's final report and recommendations on the research phase of the project. The team's report may be found at <http://www.library.cornell.edu/staffweb/CORCFinalReport.html>. The initial Cornell CORC team was Karen Calhoun, Martha Hsu, Yumin Jiang, Jill Powell, Don Schnedeker, Pam Stansbury, and Bill Walters.

## 2.0 General Description

CORC--the Cooperative Online Research Catalog--provides Web-accessible shared databases and automated tools to help libraries manage and provide intellectual access to the massive amount of material available on the Web. It is an OCLC product. Detailed information about CORC may be found

at <http://www.oclc.org/corc/>. OCLC has announced that CORC is the first phase of its next-generation cataloging service (i.e., OCLC is gradually moving to a Web-based interface for its cataloging system). While the product is far from perfect, OCLC has made a resource-intensive and highly public commitment to the CORC platform, and they have continually enhanced the product.

OCLC made CORC available as a production system in the summer of 2000. Any library that has cataloging authorizations for the OCLC system may use it. Usage is transaction-based and mirrors the pricing for the OCLC cataloging system (except there are no connect-time fees). (verify info re connect time)

Production use of CORC at Cornell would add searching and export transactions to the total of current OCLC WorldCat transactions. It is difficult to estimate how many, but one could expect the increase to be modest, given the proportion of the materials budget currently expended on e-resources.

If CORC is implemented at Cornell this fiscal year, Cornell CORC transactions will be covered under the fixed-fee subscription price that CUL has negotiated with NYLINK this fiscal year (double check). To permit tracking of CORC usage, Cornell has six CORC-specific OCLC authorization numbers and passwords. Using this data, Cornell's CORC implementation coordinator could provide CUL Accounting with financial projections for fiscal year 2002/03.

A particularly valuable aspect of CORC is the availability of many thousands of e-resource descriptions that can be displayed, edited, and exported in both Dublin Core and MARC. This feature, which supports participation by selectors and reference staff in the e-resource description process, has the potential to streamline and quicken e-resource workflows, speed user access to e-resources, and lower processing costs.

CORC's combination of functions and tools make it unique in the library market at this time. While the Dublin Core Metadata Initiative has spawned numerous Web-accessible tools for generating and harvesting DC metadata, CORC offers the only currently-available system (1) that stores a very large and growing number of e-resource descriptions for cooperative use by libraries and (2) in which DC and MARC interoperate.

The objective of this implementation plan is to outline the necessary steps for putting CORC into production use at Cornell for the purpose of:

- Selecting and describing new Internet resources of interest to the CUL community
- Implementing a new workflow in which a selector or reference librarian can generate a preliminary record in Dublin Core, and pass it to acquisitions and cataloging, together with administrative metadata about the resource.

## **2.1 Hardware and Telecommunications**

OCLC-recommended hardware is a 300 MHz Pentium II processor and 64MB RAM, set to display at a resolution of 1024 x 768. The computer must be connected to the Internet.

These requirements are compatible with the requirements for running Voyager clients. (verify display resolution)

## 2.2 Software

CORC is accessible via Netscape 4.7 or higher or Internet Explorer 5.x or higher. No additional software, such as OCLC Passport or CatME, needs to be downloaded or installed on the user's workstation. To view or print CORC documentation, the workstation will need to have Adobe Acrobat installed.

CORC users have reported that Internet Explorer works better with CORC than Netscape Navigator. Users running Netscape Navigator may experience problems with text boxes containing 512 or more characters.

A user ID and password is required to logon to CORC, and any valid OCLC cataloging authorization will work. However, to allow separate tracking of CORC usage, Cornell has obtained six OCLC authorizations and passwords to be used with CORC only. They are ready to be deployed.

## 2.3 Databases

CORC is a Web-based set of metadata tools and databases. The databases accessible via CORC include:

- the CORC Resource Catalog (metadata for e-resources)
- WorldCat (accessible from CORC)
- the CORC Pathfinder Database (a database of shared subject guides)
- the CORC Authority File
- WebDewey in CORC (an optional subscription service) <sup>1</sup>

## 2.4 Documentation and Training

Online help is available, as is full written documentation. Documentation is accessible at no charge via the CORC home page (as PDF files). The current list of documentation files includes:

- Getting Started with CORC
- Find CORC Resource Records
- Create, Import, and Export CORC Resource Records
- Edit CORC Resource Records
- Use CORC Authority File

- Create and Use CORC Pathfinders
- TB 239: Integration of the OCLC Cataloging Service and CORC
- Dublin Core Elements, Qualifiers, and Schemes for CORC Resource Records
- CORC Institution Administrator's Guide

Teaching and learning guides and tools, also Web-accessible, include the no-charge CORC Practice area, an online demo and tutorial, and exercises. In addition, CORC participants have made various documents available via the CORC home page. Documents include sample workflows (e.g., from the Smithsonian Library).

NYLINK offers CORC training programs-some as near as Syracuse. Given the size of Cornell's operation, a NYLINK trainer would probably be willing to come to Cornell to do CORC training here. The last time Cornell arranged such an event, NYLINK did an all-day, on-site session here at no charge.

## 2.5 Support

When CORC online help and/or documentation is insufficient, inquiries may be directed to NYLINK or OCLC User and Network Support. Both 800-number telephone and e-mail inquiries are supported. Turnaround time for inquiries has been fast. For some problems, the Cornell CORC administrator may be contacted (this is a person-currently Karen Calhoun-who is authorized to do a few simple things like set session preferences or unlock Cornell-edited records).

## 2.6 Product Linkages

The important linkages to consider are CORC to Voyager, CORC to ENCompass, and CORC to a special Cornell database that is currently in development (see below for more).

CORC resource records may be exported as Dublin Core or MARC. The formats supported are HTML and RDF (for DC records) and OCLC-MARC (for MARC records). Authority records may be exported from CORC in OCLC-MARC only (there is no DC equivalent for authority records).

The Voyager clients can support only MARC at this time, whether records are imported one at a time or in batch mode. OCLC-MARC is supported in Voyager. ENCompass, however, can theoretically import DC records; import into the staff client is a documented feature of the ENCompass system, although the Cornell team has not been able to make this feature work, so far. The Cornell ENCompass team is currently exploring this issue with Endeavor and lobbying for support for import of DC resource records to ENCompass from CORC.

The initial Cornell CORC team recommended the development of a Cornell database to store internal evaluative and managerial information related to networked resources. Adam Chandler, CTS Information Technology Librarian, applied for and received a small ALCTS grant to work on this project. Development work is currently underway. If successfully implemented, the database would

eliminate the need for the never-popular Networked Resource Selection Form that selectors must use, and it would speed and enhance staff and user support for networked resources at Cornell. It is highly desirable for CORC-exported records to provide the descriptive metadata for this database, because such functionality would obviate the need for Cornell staff to key it in; it could simply be captured from the CORC record.

### 3.0 Implementation Checklist

This section proposes a prioritized list of tasks and assignments for putting CORC into production at Cornell. The task list is based on the recommendations in the "CORC at Cornell" report that is cited in the first paragraph of this document. These recommendations were favorably received at the CUL Academic Assembly of February 2000.

#### 3.1 Milestone Plan and Tasks

|           | Milestones and Tasks  | Who                                | Start Date | End Date |
|-----------|---|------------------------------------|------------|----------|
| <b>1.</b> | <b>Gain approval for CUL CORC implementation plan</b>                             |                                    |            |          |
| 1a.       | Present plan to LMT; pending approval, get list of other groups to be consulted   | CORC coordinator                   |            |          |
| 1b.       | Prepare communication plan for other CUL groups                                   | CORC coordinator                   |            |          |
| 1c.       | Consult other CUL groups; get input   | CORC coordinator                   |            |          |
| 1d.       | Revise implementation plan  | CORC coordinator                   |            |          |
| 1e.       | Approve implementation plan   | LMT                                |            |          |
| 1f.       | Appoint CORC implementation team  | Deputy University Librarian?       |            |          |
| <b>2.</b> | <b>Bring up CORC for CUL-wide searching</b>                                       |                                    |            |          |
| 2a.       | Prepare CUL-internal training plan based on materials available on CORC home page | CORC implementation team, with LHR |            |          |

|     |  |   |  |  |
|-----|--|---|--|--|
| 2b. | Identify participants  | LHR   |  |  |
| 2c. | Schedule training; reserve rooms (prob. need computers and Internet access)  | LHR   |  |  |
| 2d. | Publicize training opportunity   | LHR and CORC implementation team  |  |  |
| 2e. | Prepare instructions for netadmins re: library staff workstations and troubleshooting/support protocol (what version of IE or Netscape, which CORC autho to use, system requirements for MHz and RAM, how to report problems, etc.); train netadmins | CORC implementation team  |  |  |
| 2f. | Conduct training; distribute CORC documentation  | CORC implementation team, trainees, netadmins                               |  |  |
| 2g. | Distribute CORC authos instructions for workstation config.; explain troubleshooting/ support protocol   | CORC implementation team, at training session(s)                            |  |  |
| 2h. | Implement support and troubleshooting protocol CORC implementation team  | CORC implementation team  |  |  |
| 3.  | <b>Develop e-resource tracking database and Web-based Networked Resource Selection Form</b>  |   |  |  |
| 3a. | Develop CORC front end for Cornell networked resource tracking database  | CTS Information Technology Librarian  |  |  |
| 3b. | Finalize administrative metadata content for tracking database   | CTS IT Librarian, CTS Acq Librarian, CTS E-Resource coordinator, [selector] |  |  |

|           |   |  |  |  |
|-----------|---|--|--|--|
| 3c.       | Build Web form  | CTS IT Librarian                           |  |  |
| 3d.       | Build tracking database   | CTS IT Librarian                           |  |  |
| 3e.       | Demo form and db; discuss with ERC and selectors; get input   | CTS IT Librarian, ERC, CDEXEC              |  |  |
| 3f.       | Finalize db and Web form  | CTS IT Librarian                           |  |  |
| <b>4.</b> | <b>Prepare guidelines for the creation/editing of DC preliminary records at CUL</b>                       |  |  |  |
| 4a.       | Examine DC Usage Guide and DC-Libraries draft Application Profile, etc.                                   | ENCompass metadata group                   |  |  |
| 4b.       | Draft DC application profile for CUL use in ENCompass, CUL Gateway and CORC                               | ENCompass metadata group                   |  |  |
| 4c.       | Review draft DC profile   | CUL Metadata Forum, CDEXEC, IRPC           |  |  |
| 4d.       | Finalize and announce CUL DC profile  | ENCompass metadata group                   |  |  |
| <b>5.</b> | <b>Introduce new workflow using CORC to precatalog e-resources, using DC and Web-based selection form</b> |  |  |  |
| 5a.       | Draft, review and document new workflow   | CORC implementation team, CTS IT Librarian |  |  |
| 5b.       | Prepare CUL training plan, based on bringing in NYLINK  | CORC implementation team                   |  |  |
| 5c.       | Identify participants (selectors, ref libns, catalogers, netadmins)                                       | LHR, CORC team                             |  |  |
| 5d.       | Schedule training; reserve rooms (w computers and Internet access)  | CORC team, NYLINK, LHR                     |  |  |

|     |   |  |  |  |
|-----|---|--|--|--|
| 5e. | Publicize training opportunity  | LHR, CORC team   |  |  |
| 5f. | Prepare documentation for using Web-based Networked Resource Selection Form and tracking database   | CTS E-Resource Coordinator, with Acq Libn, CTS IT Libn, selectors                              |  |  |
| 5g. | Distribute CORC authos; conduct training distribute documentation on: <ol style="list-style-type: none"> <li>1. CORC editing, record creation, and export;</li> <li>2. use of CUL DC profile;</li> <li>3. CUL workflow; and</li> <li>4. use of new Web form and tracking database.</li> </ol> | NYLINK trainer; ENCompass metadata group; CORC implementation team; CTS E-Resource Coordinator |  |  |
| 5h. | Announce and roll out new Web form and tracking database  | CTS Information Technology Librarian   |  |  |

### 3.2 Deliverables

This project may be expected to produce the following deliverables:

- Implementation of CORC at CUL, first for searching, then for record edit/creation/export
- CUL guidelines for the use Dublin Core in CORC, ENCompass and Gateway records
- New Web-Based Networked Resource Selection Form
- E-Resource Tracking Database (needs a name)
- New e-resource selection and processing workflow

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<sup>1</sup> Cornell has subscribed to WebDewey this year to support a CUL internal grant-funded project that uses CORC. The subscription fee \$500/year has been paid from the grant funds.

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