

UTILIZING OUR OCLC DATA SYNC COLLECTIONS WITH ALMA PUBLISHING

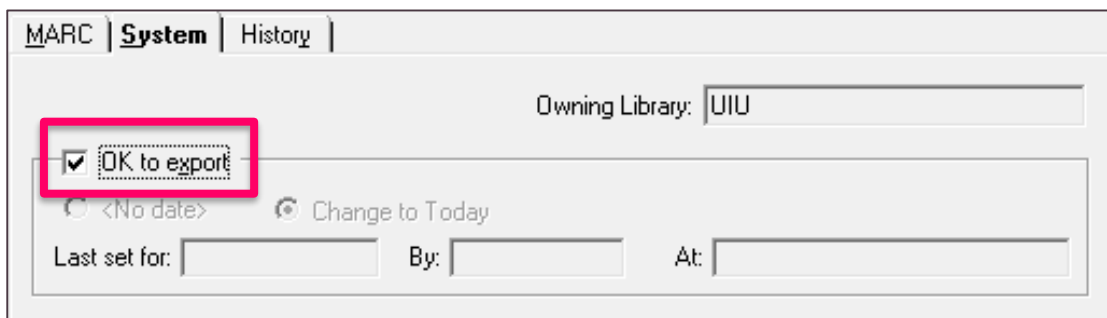


April 27, 2020

Nicole Swanson, CARLI

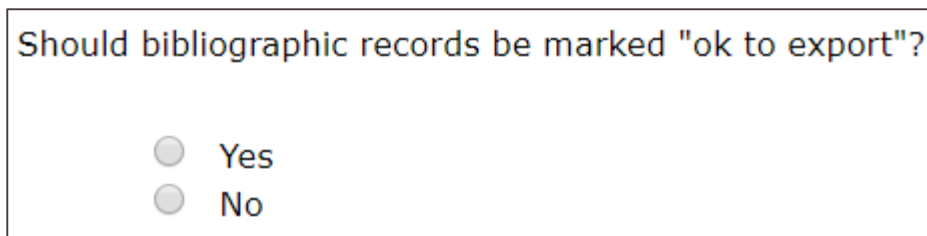
1. Bibliographic Data Sync Collections

<https://www.carli.illinois.edu/products-services/i-share/cat/oclcbackload>



The screenshot shows the Voyager Cataloging interface. At the top, there are tabs for 'MARC', 'System', and 'History'. Below the tabs, there is a field for 'Owning Library' with the value 'UIU'. A checkbox labeled 'OK to export' is checked and highlighted with a red box. Below this, there are radio buttons for '<No date>' and 'Change to Today'. At the bottom, there are input fields for 'Last set for:', 'By:', and 'At:'.

Voyager Cataloging – Bib record’s System Tab – OK to Export



The screenshot shows a 'Work Request Online Form for Voyager Bulk Import'. The question is 'Should bibliographic records be marked "ok to export"?'. There are two radio buttons: 'Yes' and 'No', both of which are unselected.


Work Request Online Form for Voyager Bulk Import

2. LHR Data Sync Collections

3. Special Project Data Sync Collections

Bib Data Sync Collections Modified During the Technical Freeze

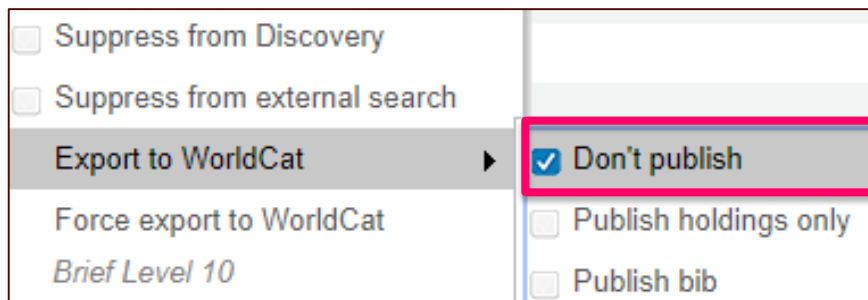
- Some things will stay the same:
 - sets your library's holdings (OCLC symbol) based on OCLC number matching
 - does not contribute bib data
- Some things will change:
 - Alma configured as the new ILS
 - “Use Record Status for Processing” set to “Yes”!
 - if LDR/05= d (deleted), then your library's holdings (OCLC symbol) removed



```
=LDR 01181dam a2200361I 4500  
=001 99740983405893  
=005 20200421130239.0  
=008 770823s1965\\fr\\f\\c\\000\\0\\fre\\  
=010 \\$a68134643
```


LDR/05="d" is set in Alma when you:

- Delete a bib
- Delete all holdings attached to a bib (even if the bib remains)
- Newly set the Don't publish flag
(MD Editor > Tools > Set Management Tags > Export to WorldCat)




- Suppress (a bib) from discovery (Primo VE) + Don't publish set
- Suppress (a bib) from external search (Z39.50) + Don't publish set
- Change the publish setting from "Publish bib" to "Publish holdings only" (the setting for LHRs)

Deleting all holdings and items attached to this bib automatically processed the record as a delete, replacing LDR/05=c with LDR/05=d in the file to send to OCLC.



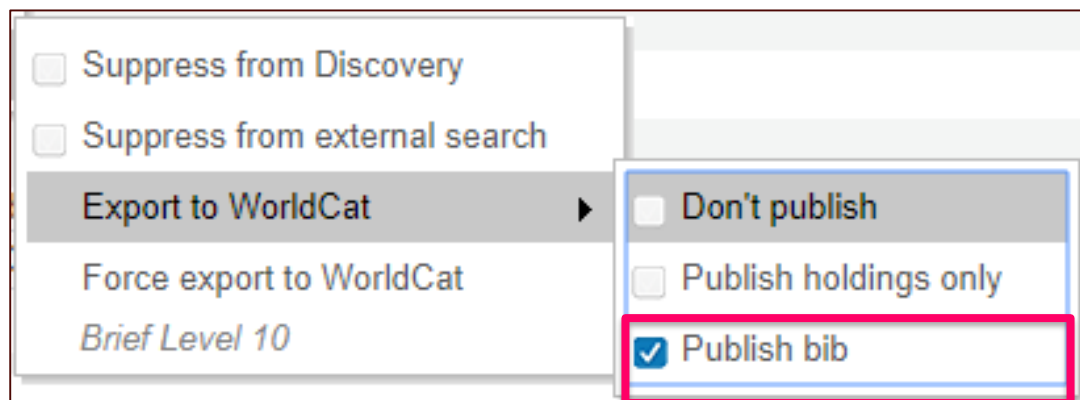
| | |
|------------|------------------------------|
| LDR | 01181cam a2200361I 4500 |
| 001 | 99740983405893 |
| 005 | 20200421130239.0 |
| 008 | 770823s1965 fr f c 000 0 fre |
| 010 | __ a 68134643 |
| 015 | __ a F67-6295 |
| 019 | __ a 7404495 |
| 035 | __ a (OCoLC)ocm03213292 |



```
=LDR 01181dam a2200361I 4500
=001 99740983405893
=005 20200421130239.0
=008 770823s1965\\fr\\f\\c\\000\\0\\fre\\
=010 \\$a68134643
=015 \\$aF67-6295
=019 \\$a7404495
=035 \\$a(OCoLC)ocm03213292
```

Bib Data Sync publishing is triggered when you:

- Add a bib (with holdings) and set “Publish bib” flag
(MD Editor > Tools > Set Management Tags > Export to WorldCat)



- Change a bib since the last export
- Manually select
 - “Publish bib” on an existing record
 - “Force export to WorldCat”

LHR publishing is triggered when you:

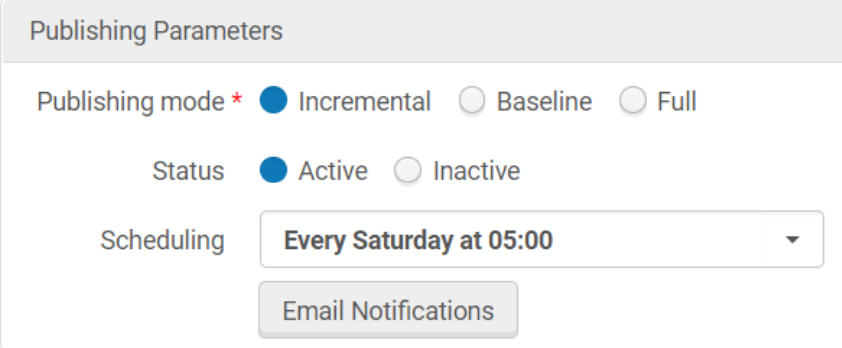
- Add a bib (with holdings) and set “Publish holdings only”
(MD Editor > Tools > Set Management Tags > Export to WorldCat)

| | |
|--------------------------------------------------------|-----------------------------------------------------------|
| <input type="checkbox"/> Suppress from Discovery | |
| <input type="checkbox"/> Suppress from external search | |
| Export to WorldCat ▶ | <input type="checkbox"/> Don't publish |
| Force export to WorldCat | <input checked="" type="checkbox"/> Publish holdings only |
| <i>Brief Level 10</i> | <input type="checkbox"/> Publish bib |

Publishing Profiles

1. Publish bibliographic record (DataSync) to OCLC

- Set to run daily at 05:00
- Option to receive email notifications on the job's success or errors.



The screenshot shows a configuration form titled "Publishing Parameters". It includes the following elements:

- Publishing mode ***: Three radio buttons are present: "Incremental" (selected), "Baseline", and "Full".
- Status**: Two radio buttons are present: "Active" (selected) and "Inactive".
- Scheduling**: A dropdown menu is set to "Every Saturday at 05:00".
- Email Notifications**: A button located below the scheduling dropdown.

2. Publish electronic holdings to OCLC

- Set to run weekly, every Saturday at 06:00
- Temporary logical set pulls local, available electronic portfolios containing OCLC numbers. Adjust as needed after go live.

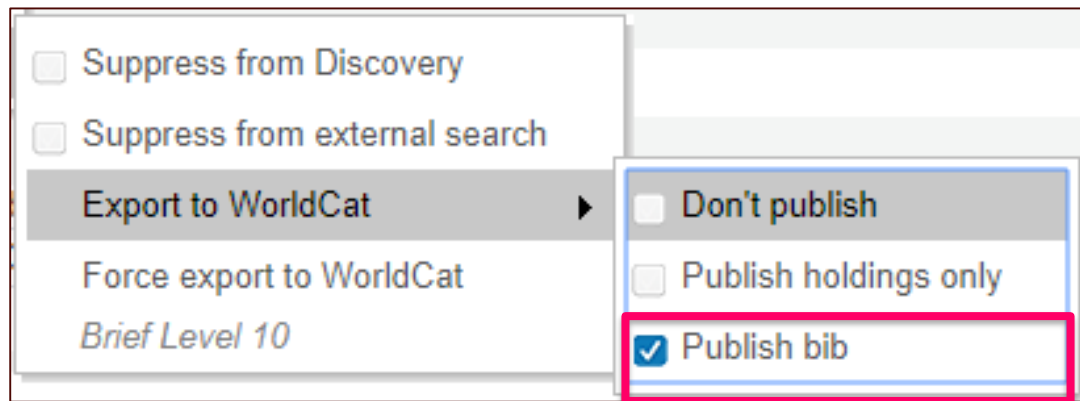
3. For libraries with LHRs: Publish your local holdings records (LHRs) to OCLC

- 1 or 2 s/ftp definitions
 1. OCLC Bib Data Sync
 2. For libraries with LHRs: OCLC LHR Data Sync
- 2 tables for institutions with group data sync collections only:
 - Map Holdings fields into Bib record OCLC table
 - Institution OCLC symbol table

| Library Code | Symbol | Location Code |
|--------------|--------|---------------|
| JTR | IAC | |
| LOOP | IAC | |
| SPCA | IAC | |
| LAW | IBC | |

| targetCode | holdingTag | HoldingSubfield | bibTag | bibSubfield |
|------------|------------|-----------------|--------|-------------|
| 994b | 852 | b | 994 | b |

Ex Libris will run baseline jobs right before go live.



Timeline Recap

| | |
|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
| Prior to the Technical and Configuration Freeze May 1 | CARLI sets up the Alma configuration for publishing profiles, s/ftp definitions, and additional tables for group collections. |
| During the Technical Freeze | OCLC modifies Standard Bib Data Sync Collections for Alma, LHR timeline tbd. |
| Just before June 24 | Ex Libris runs Baseline jobs for Bib and LHR Data Sync publishing profiles. |
| After Go Live | Test your Data Sync collections to be sure they are working as expected. |

What you can do now to prepare:

1. Fill out a form for each Data Sync Collection contact
<https://app.smartsheet.com/b/form/d5303dbedf0241e2b3cc014bf1e1655d>
2. Identify records you would like to use for testing setting holdings and sending deletes.

Thank you!

Please contact us at
support@carli.illinois.edu
with additional questions.

