Local Holdings Records Data Sync Collection Migration

OCLC has migrated all I-Share institutions' Local Holding Record (LHR) projects to data sync collections in OCLC's WorldShare Metadata Collection Manager platform.

Between now and October 14th, there are steps your institution and CARLI need to take to ensure these collections are enabled and function as expected.

Institutions should:

1. **Identify two people as the main contacts** for your LHR data sync collection who should receive Collection Manager Reports. (Often, these contacts will include your I-Share Technical Services contact or Cataloging contact.)

2. **Review the configuration** of your migrated LHR data sync collection in Collection Manager using the recommended institution and collection-level settings identified below.

Do not click the "Submit Collection" button while you are reviewing your collection. Once a collection is submitted, most of the settings will no longer be available to edit. Please only save your changes as you review by clicking *Save Progress* or *Save*.

3. Review the returned processing report for the October 21, 2016 files to confirm that the data sync collection did indeed add your local holdings records.

CARLI will:

1. Complete a final review of your collection's settings.

2. Submit the collection to OCLC for their review.

3. Send your LHR files to OCLC October 21, 2016 to test the new collection configuration.

4. Confirm with you that the LHRs were added as expected when the LHR processing reports are sent.
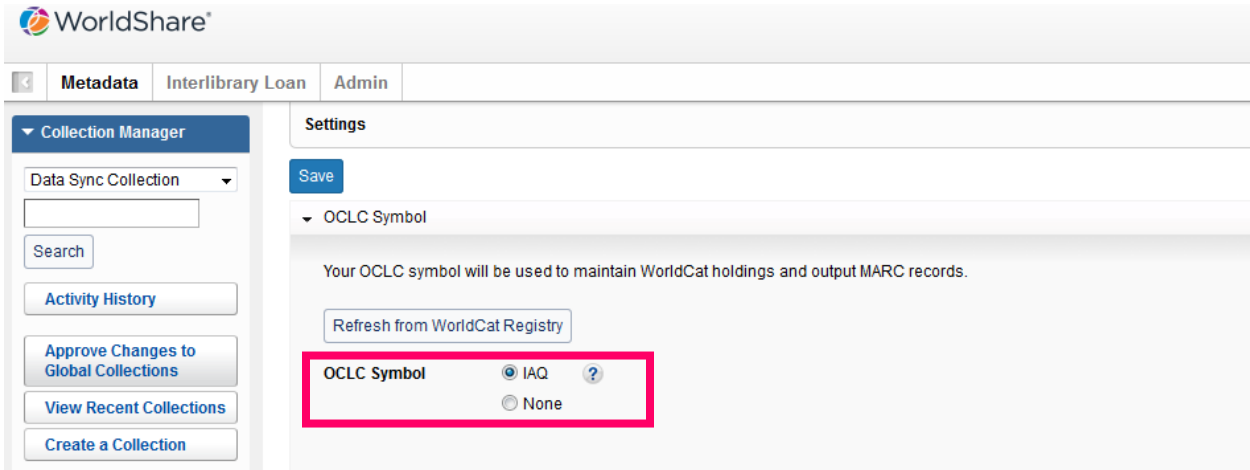
I. Check two Institution-Level Settings on the WorldShare Metadata - Collection Manager – Settings tab:
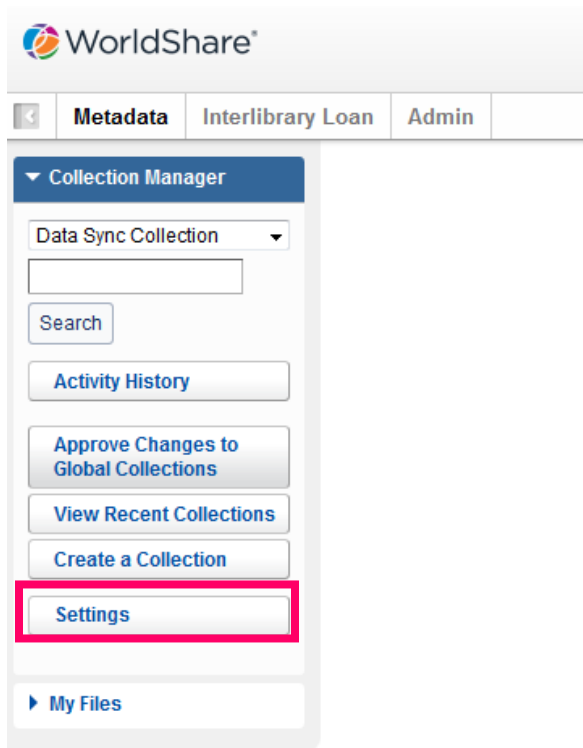
1. Select the **OCLC Symbol** blind.
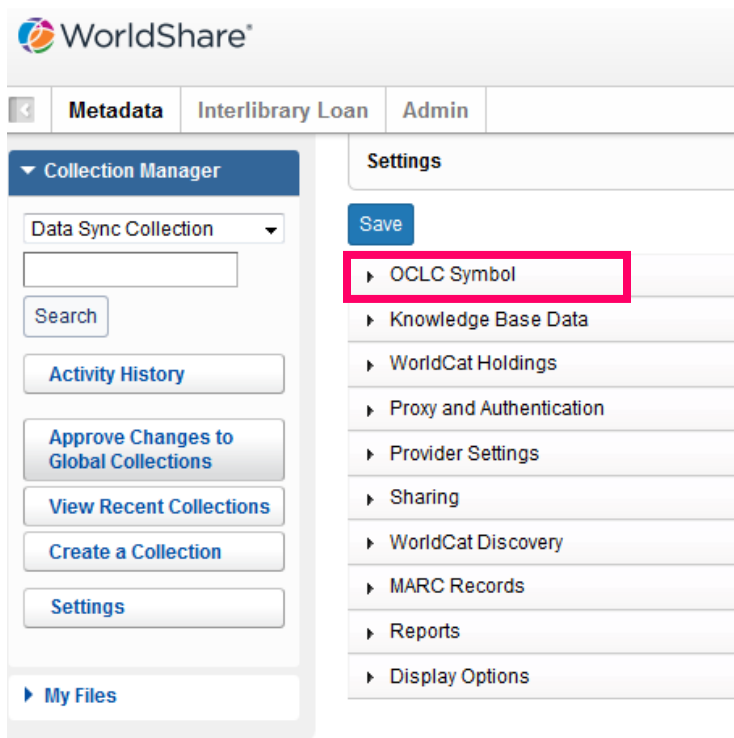
Then, verify your institution's OCLC symbol is selected. If it is not, add your OCLC symbol, then click **Save.**

Example OCLC Symbol set for Parkland Community College

2. Select the **Reports** blind.

Then, enter or verify the following settings:

Receive Email Reports	Yes
Authorization code	your **9-digit cataloging authorization number**
Report Types	- Select **Data Sync Reports**, then select both **LHR Processing** and **LHR Processing Exceptions** - Verify **Bibliographic Record Processing** is already selected for your backloading collection
Email Addresses	- Verify there are **two** email contacts for your institution separated by a semi-colon - Verify that CARLI **contacts long20@uillinois.edu** and **fellows@uillinois.edu** added for the backloading project are already listed - Add CARLI contact **jmasciad@uillinois.edu** for LHR setup confirmation and testing
Report format	Please select **Excel** during this collection setup period.
Received as	Please select **Email attachment** during this collection setup period.

Click **Save** when you are finished.

▾ Reports

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

Receive Email Reports
 ◉ Yes
 ○ No

Authorization Code * [████████____] ?

Report Types *
 ▶ Records Reports
 ▶ WorldCat Holdings Reports
 ▶ Cataloging Partner Reports
 ▾ Data Sync Reports
  ☐ Data Sync Records
  ☐ Data Sync Monthly Records
  ☑ Bibliographic Record Processing
  ☐ Bibliographic Record Processing Exceptions
 ☑ LHR Processing
  ☑ LHR Processing Exceptions

Email Address(es) * [llinois; fellows@uillinois.edu; jmasciad@uillinois.edu] ?

Report Format
 ○ HTML
 ◉ Excel

Receive as
 ◉ Email Attachment
 ○ Hyperlink

Example Data Sync Collection - Reports Blind

II. Verify and adjust the settings as needed in your Local Holdings Records Collection.

To search for your Data Sync Collection, from the Collection Manager blind, select **Data Sync Collection.** Next, click the **Search** box.
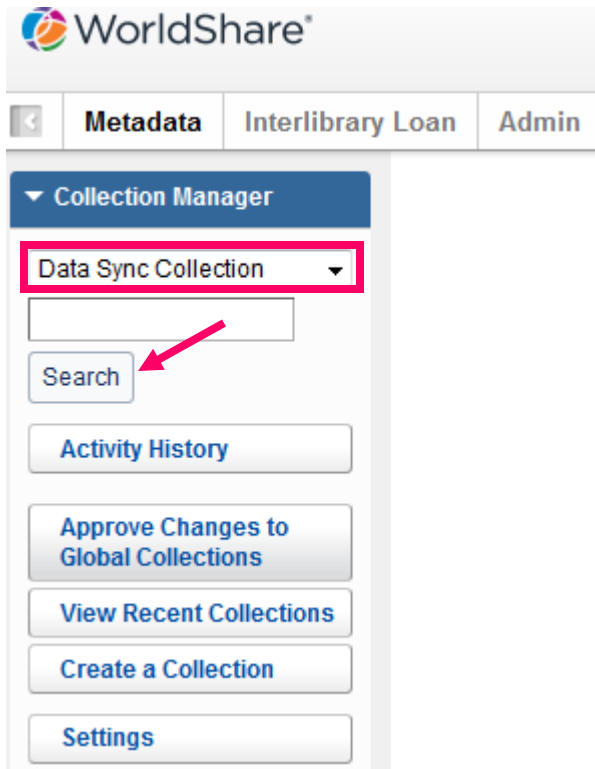
Then, select the Local Holdings Records Collection Name. This will initially display your former LHR project ID.

Collection Name		Collection ID		Collection Type		Collection Status		Translation Table Status
(P002341) Bibliographic Data Collection for Backloading Holdings		1012625		Bibliographic		In Progress		None
P011746 files sent from CARLI		1017001		Local Holdings Records		In Progress		None

Example Data Sync Collection Search Results

Four collection-level blinds will become available for your review:
- Properties
- Local Holdings Records Information
- Comments
- Contact Information

Example of Four Data Sync Collection Blinds

1. Select **the Properties** blind and verify or add the following settings:

Collection Name	Add **parentheses** around the prepopulated **project ID** and remove files sent from CARLI (this is added already below), then, add a more descriptive title to the beginning of the line: **Local Holdings Records Collection**.
Collection ID	This number is systematically populated. It is the new reference ID for your data sync collection.
Institution and **Symbol**	System populated
Group	**No**
WMS Library	**No**
Collection type	**Local Holdings Records**
Original Data Format	**MARC**
Use Record Status for Processing	**Yes**
Remove WorldCat	**No**

Holdings When Final LHR Deleted	
Default Data Sync Collection	No, unless this is your first data sync collection. In which case, it will automatically be set as the default.
	<The next five settings are system populated.>
Description	Prepopulated note, ensure it includes "**files sent from CARLI".** This description will assist OCLC data analysts working on the project.

Click **Save Progress.**

Example Data Sync Collection – Properties blind

2a. Select the **Local Holdings Records Information** blind – **MFHD** tab and verify or add the following:

Initial Estimate for Record Count	Add **200**
Provider	<blank>
System Name	**Voyager Library (vendor Ex Libris, a ProQuest company)**
Version	**9.1.1**
OCLC Number Location	**035$a**
Local System Holdings Record Number Location(s)	**001**
Local System Bibliographic Record Number Location(s)	**004**

Example Data Sync Collection – Local Holdings Records Information blind – MFHD tab

2b. Then, select the **Processing** tab on the **Local Holdings Records Information** blind and verify the following:

Use Acquisition Status Value	No
Excluded Information for Fixed Fields	No values added
Excluded Information for Variable Fields	No values added

Click **Save Progress.**

Example Data Sync Collection – Local Holdings Records Information blind – Processing tab

5. On the **Comments** blind, click **Add Comment** and enter following values:

Topic	Content
Comment	**LHR project; files sent from CARLI.**

Click **Save Progress.**

Example Data Sync Collection – Add Comment window

Example Data Sync Collection – Comments blind display

6. The **Contact Information** blind should include the following:

Two contacts for your institution	
Two CARLI contacts	• Jennifer Masciadrelli, Senior Project Management Coordinator, jmasciad@uillinois.edu • Gordon Fellows, CARLI Senior Research Programmer, fellows@uillinois.edu

Add or remove contacts using the green or red buttons under the Action column.

Click **Save Progress.**

Example Data Sync Collection – Contact Information blind

Thank you for reviewing and adjusting your settings!

Once settings are confirmed, CARLI staff will submit your LHR project and upload your next set of LHR files to test the new collection.

When you receive the LHR Processing and LHR Processing Exceptions reports from October 21, 2016, please review and confirm with CARLI at support@carli.illinois.edu that the LHRs were added as expected.