CARLI

TECH SERVICES Q&A
OCLC DATA SYNC AND GENERAL Q&A
NOVEMBER 11, 2011

Agenda

1. What is Data Synchronization?
2. How is it triggered?
3. Basics of the setup in Alma, CARLI, and OCLC
4. New Timing for Processing
5. New Reports
6. How is it working for you?

7. General Technical Services Q&A

https://www.carli.illinois.edu/products-services/i-share/physical-res-man/oclc-data-sync

View > Holdings > State Locations
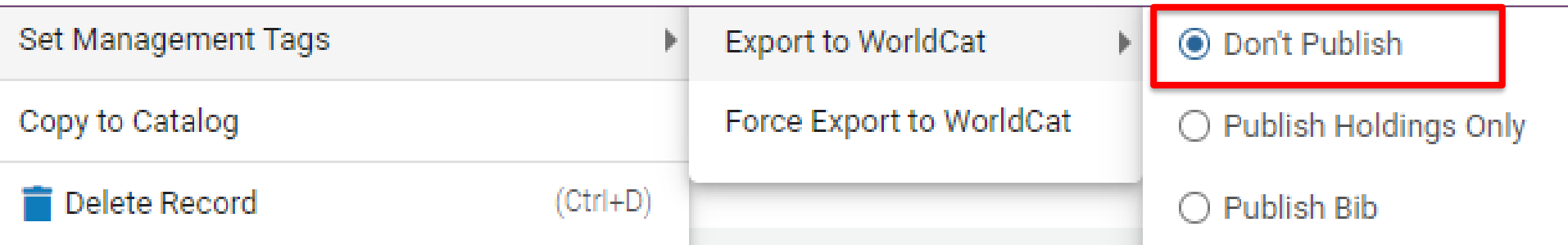
Deletes: LDR/05="d" is set on records to publish when you:

- Delete a bib

- Delete all holdings attached to a bib (even if bib remains)

- Newly set the Don't publish flag

    Record Actions > Set Management Tags > Export to WorldCat >

    set flag "Don't Publish"

Adds:

- Add a bib (with holdings) and set "Publish bib" flag

  Record Actions > Set Management Tags > Export to WorldCat > set flag
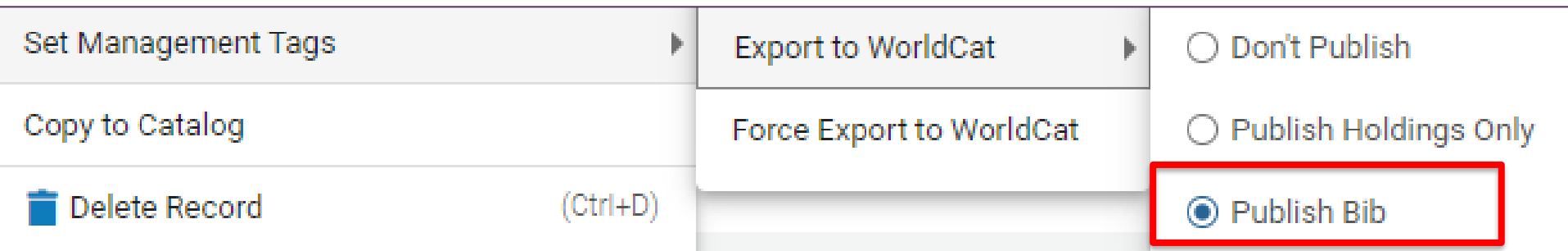
- Change a bib since the last export
- Manually select
  - "Publish bib" on an existing record
  - "Force export to WorldCat"

2 Alma publishing profiles:

- 1 for physical items
- 1 for electronic items

Publish bibliographic record (DataSync) to OCLC

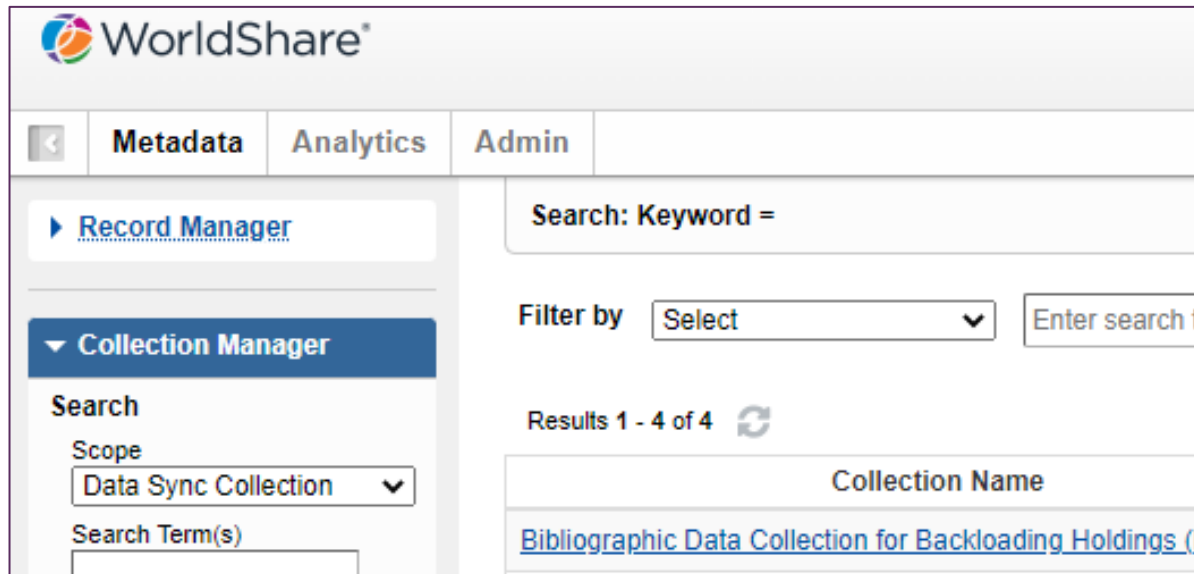Publish electronic holdings to OCLC

Default electronic set:

Electronic portfolios ▼	Zone: ● ♠ Institution ○ ⛓ Network ○ 👥 Community		
OCLC Control Number (035a)	Contains Keywords	*
AND OR	Is Local (Electronic Portfolio)	Equals	Yes
AND OR	Availability (Electronic Portfolio)	Equals	Available

Bibliographic Data Sync Collection

- Only matches on OCLC number

- Recommendation of 2 Contacts from your library
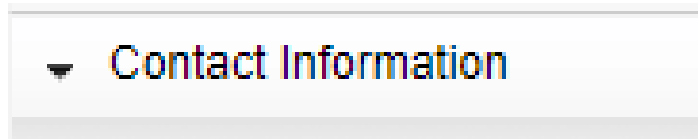
Past Institution Settings for Data Sync may not be impacting new processing at this time.

Alma publishing:

- 5:00 a.m. each day for physical inventory

- 6:00 a.m. Saturday for electronic inventory

CARLI processing:

- 7:00 a.m. each day

- Records then sent to OCLC
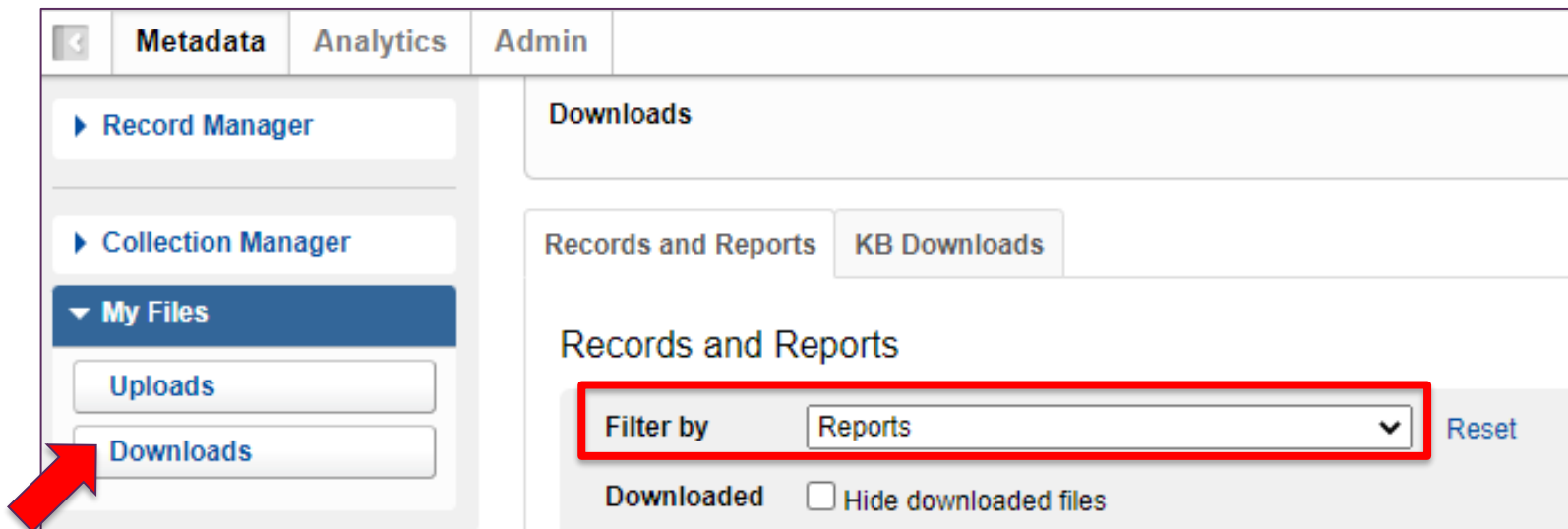
OCLC Data Sync Collection processing:

- Reports are available daily once processing concludes!

[OCLC Documentation for the New Reports](#)

- Report details
- Example reports

Access Data Sync Reports

WorldShare > Metadata > My files > Downloads, Filter by Reports

Demo reports

- BibCrossRefReport.txt

- BibSumaryReport.txt

  - BibProcessingReport – a closer look at what was set, or if there were any problems

    o Notify CARLI if you see "create" or "unresolved"

- BibUnresolvedCrossRefReport.txt- remediation?

- BibExceptionReport.txt – excluded to do server or data errors

  - Notify CARLI if you see validation errors

- HoldingSumaryReport.txt

  - HoldingProcessingReport.txt – to take a closer look

How is it working for you?

Questions?

Thank you!

Next Tech Services Q&A: January 27 @ 10:30

You can always contact CARLI at support@carli.Illinois.edu