



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

1. WHAT IS DATA SYNCHRONIZATION?



 OCLC
WorldCat®

 ExLibris
Alma

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



View > Holdings > State Locations

Tolkien treasures

Author: [Catherine Mcllwaine](#); [Bodleian Libraries](#)

Publisher: Oxford : Bodleian Library, 2018.

Edition/Format: Print book : English [View](#)

Summary: This lavishly illustrated book features his exquisite illustrations for...

Rating: ☆☆☆☆☆ (not yet rated)

Subjects: [Tolkien, J. R. R. -- \(John Ronald Reuel\)](#); [Bodleian Libraries -- Exhibitions](#); [Authors, English -- 20th century](#)

[View all subjects](#)

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Find a copy in the library

Enter your location:

Submit a complete postal address for best results.

Displaying libraries 7-12 out of 168 for all 2 editions (61822)

Library
7. Indiana University Bloomington, IN 47405 United States
Wheaton College Buswell Memorial Library Wheaton, IL 60187 United States

View Tools Window Help

Label... F10

Holdings

User Information...

Message of the Day...

News... Ctrl+F5

Default... Ctrl+Shift+D

All... Ctrl+Shift+A

State... Ctrl+Shift+T

Regional... Ctrl+Shift+G

View Holdings

State Locations - No holdings in ILL - 169 other holdings

Mcllwaine, Catherine, author. Tolkien treasures / Catherine Mcllwaine. Oxford : Bodleian Library, 2018. 144 pages : illustrations (some color), color maps ; 19 cm
OCLC:1007309550

State Locations

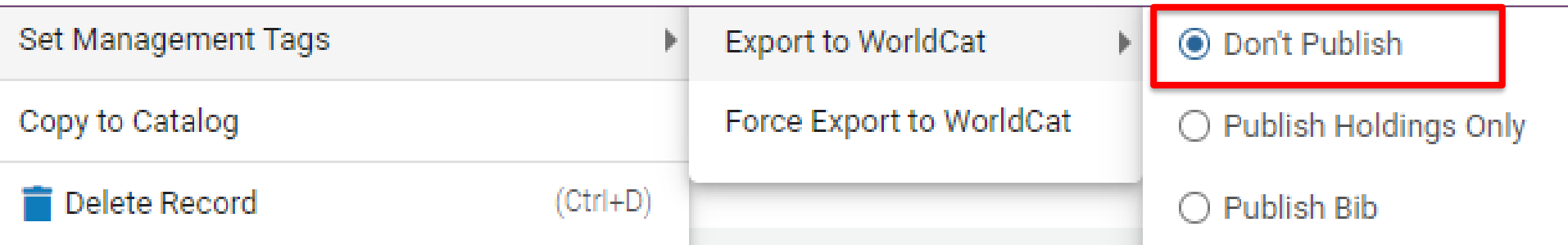
IL	CGP	GK8	GL3	IAD	IAI	IAQ	IAY	icw
	IDQ	JOY	ON8	OV7	SOI	UIU		

2. HOW IS IT TRIGGERED?

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"




Set Management Tags ▶ Export to WorldCat ▶ Don't Publish

Copy to Catalog Publish Holdings Only

 Delete Record (Ctrl+D) Publish Bib

Force Export to WorldCat



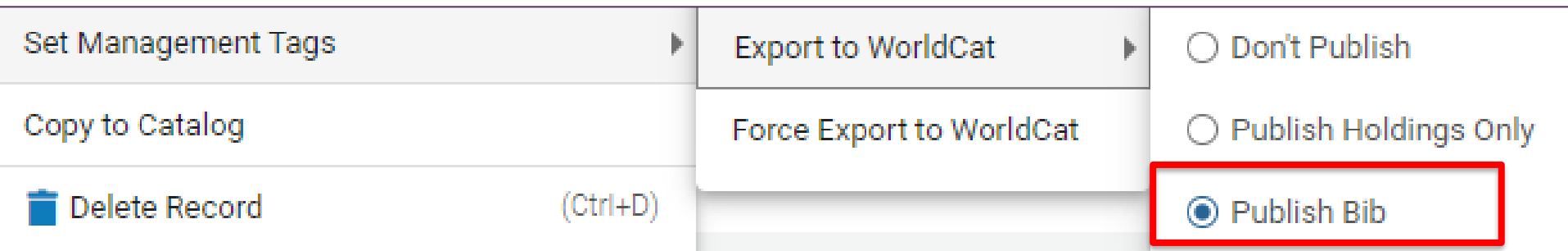
```
=LDR 01181dam a2200361I 4500
=001 99740983405893
=005 20200421130239.0
=008 770823s1965\\fr\\f\\c\\000\\0\\fre\\
=010 \\$a68134643
```

2. HOW IS IT TRIGGERED? (CONTINUED)

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”

3. SETUP IN ALMA

2 Alma publishing profiles:

- 1 for physical items
- 1 for electronic items

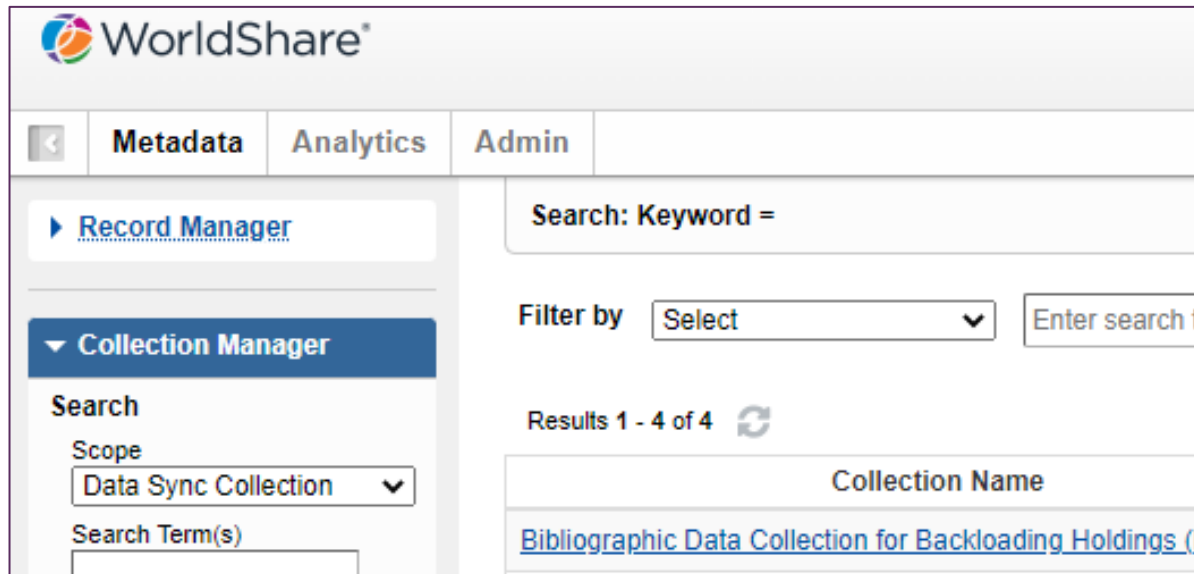
Publish bibliographic record (DataSync) to OCLC
Publish electronic holdings to OCLC

Default electronic set:

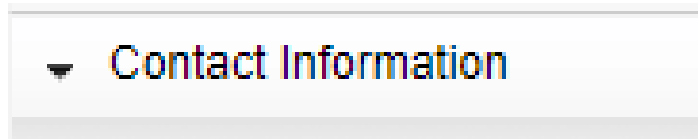
Electronic portfolios ▾	Zone: <input checked="" type="radio"/> Institution <input type="radio"/> Network <input type="radio"/> Community		
OCLC Control Number (035a) ▾	Contains Keywords ▾	*	
AND OR	Is Local (Electronic Portfolio) ▾	Equals ▾	Yes
AND OR	Availability (Electronic Portfolio) ▾	Equals ▾	Available

Bibliographic Data Sync Collection

- Only matches on OCLC number



- Recommendation of 2 Contacts from your library



3. SETUP IN OCLC WORLDSHARE (CONTINUED)

Past Institution Settings for Data Sync may not be impacting new processing at this time.

The screenshot shows the 'Institution Settings' page in OCLC WorldShare. The left sidebar contains 'Institution Settings' and 'My Files'. The main content area is titled 'Receive Email Reports' and includes the following settings:

- Receive Email Reports:** Yes, No
- Authorization Code*:** [Redacted] ?
- 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)*:** [Redacted]
- Report Format:** HTML, Excel
- Receive as:** Email Attachment

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:

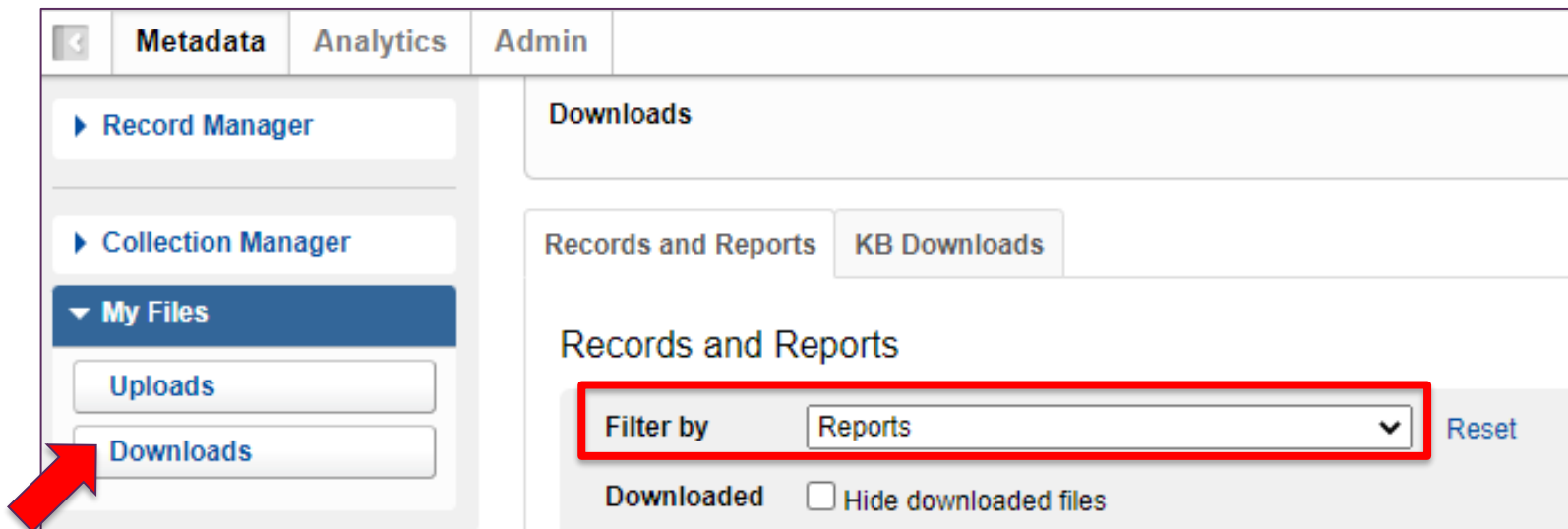
- Reports are available daily once processing concludes!

[OCLC Documentation for the New Reports](#)

- Report details
- Example reports

Access Data Sync Reports

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



The screenshot displays the WorldShare interface. On the left, a navigation sidebar contains the following items: Record Manager, Collection Manager, My Files (expanded), Uploads, and Downloads. A red arrow points to the 'Downloads' link in the sidebar. The main content area is titled 'Downloads' and contains two tabs: 'Records and Reports' (selected) and 'KB Downloads'. Below the tabs, there is a section titled 'Records and Reports' with a 'Filter by' dropdown menu set to 'Reports'. A red box highlights the 'Filter by' dropdown and the 'Reset' button. Below the dropdown, there is a 'Downloaded' checkbox and an unchecked checkbox labeled 'Hide downloaded files'.

Demo reports

- BibCrossRefReport.txt
- BibSummaryReport.txt
 - BibProcessingReport – a closer look at what was set, or if there were any problems
 - 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
- HoldingSummaryReport.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