

## *Backloading Data Sync Collection Migration*

OCLC has migrated all I-Share institutions' backloading projects to data sync collections in OCLC's WorldShare Metadata Collection Manager platform. Backloading through this service will be available starting September 30<sup>th</sup>, 2016. The process of backloading holdings is described further in our [documentation](#).

**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 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 backloading data sync collection in Collection Manager using the recommended institution and collection-level settings identified below.

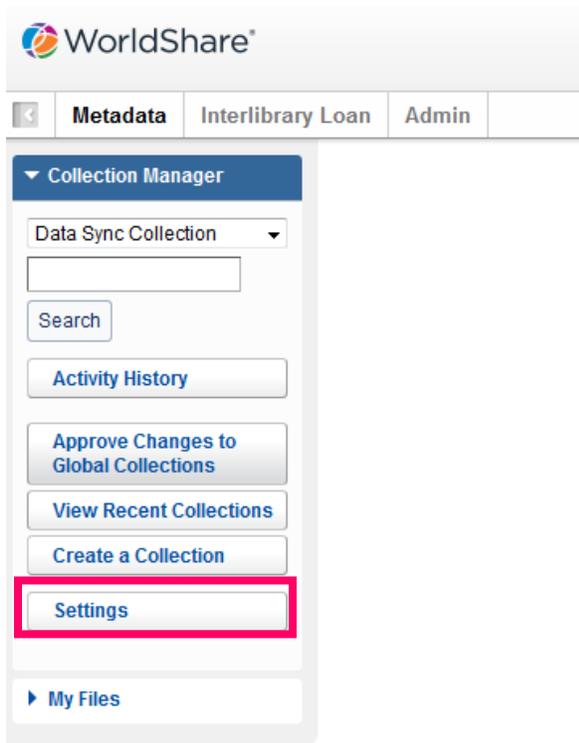
*Do not click the "Submit Collection" button* while you are reviewing your collection. Once a collection is submitted, most of the settings will no longer be available to edit. Please only save your changes as you review by clicking *Save Progress* or *Save*.

3. **Select "OK to export", then Save to DB on at least five bibliographic records** in the Voyager Cataloging Client anytime between **September 3-15<sup>th</sup>** to use as a test set. This step is described further at the end of this document.

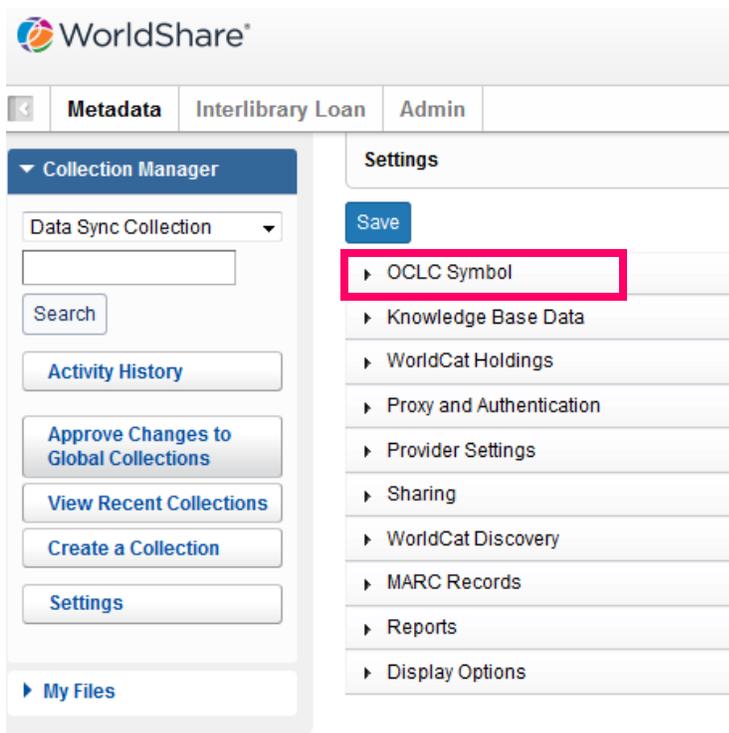
### *CARLI will:*

1. Complete a final review of your collection's settings.
2. Submit the collection to OCLC for their review.
3. After September 15<sup>th</sup>, send your records with "OK to export" selected to OCLC to test the collection configuration.
4. Use the returned processing report to confirm that the data sync collection did indeed add your holdings to WorldCat.

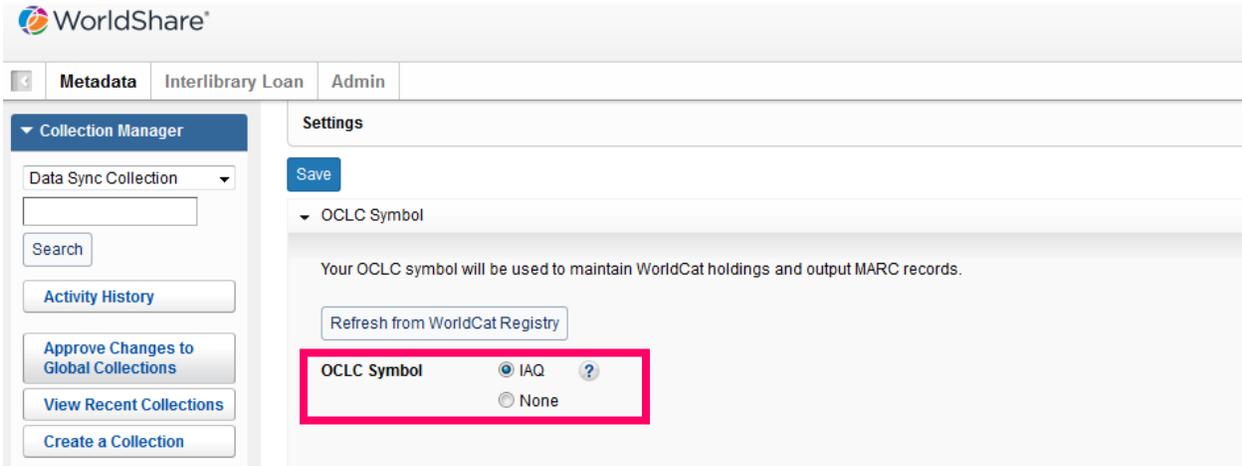
1. Check two Institution-Level Settings on the WorldShare Metadata - Collection Manager – Settings tab:



1. Select the **OCLC Symbol** blind.

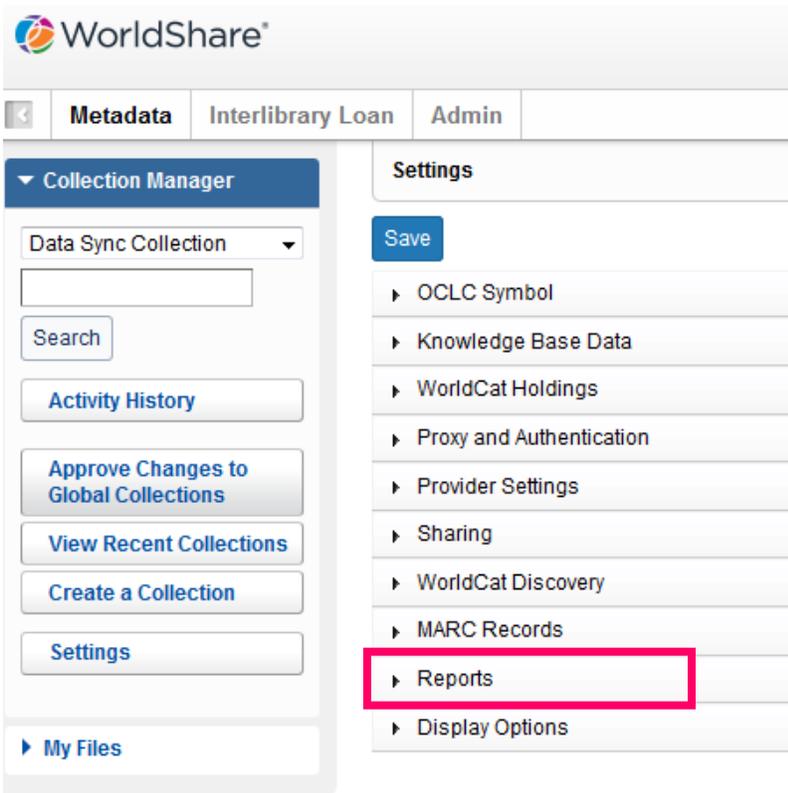


Then, verify your institution's OCLC symbol is selected. If it is not, add your OCLC symbol, then click **Save**.



Example OCLC Symbol set for Parkland Community College

2. Select the **Reports** blind.



Then, enter or verify the following settings:

<b>Receive Email Reports</b>	<b>Yes</b>
<b>Authorization code</b>	your <b>9-digit cataloging authorization number</b>
<b>Report Types</b>	select <b>Data Sync Reports</b> , then <b>Bibliographic Record Processing</b>
<b>Email Addresses</b>	<ul style="list-style-type: none"> <li>enter <b>two</b> email contacts for your institution separated by a semi-colon</li> <li>add CARLI contacts <b>long20@uillinois.edu</b> and <b>fellows@uillinois.edu</b> for setup confirmation and testing</li> </ul>
<b>Report format</b>	Please select <b>Excel</b> during this collection setup period.
<b>Received as</b>	Please select <b>Email attachment</b> during this collection setup period.

Click **Save** when you are finished.

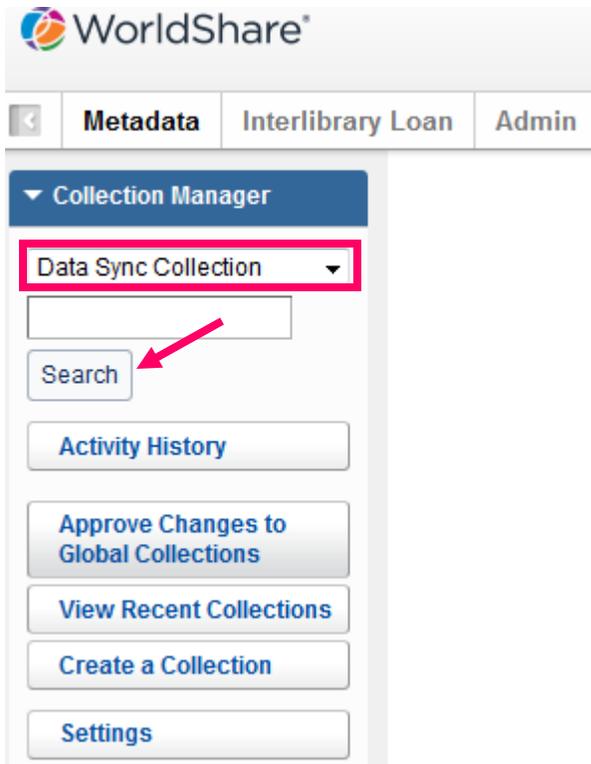
The screenshot shows a web form for configuring a Data Sync Collection. The form includes the following sections:

- Receive Email Reports:** Radio buttons for Yes (selected) and No.
- Authorization Code:** A text input field with a question mark icon.
- Report Types:** A list of report categories with expandable options:
  - Records Reports
  - WorldCat Holdings Reports
  - Cataloging Partner Reports
  - Data Sync Reports (expanded):
    - Data Sync Records
    - Data Sync Monthly Records
    - Bibliographic Record Processing (selected)
    - Bibliographic Record Processing Exceptions
    - LHR Processing
    - LHR Processing Exceptions
- Email Address(es):** A text input field containing: email1@institution.edu; email2@institution.edu; long20@uillinois.edu; fellows@uillinois.edu
- Report Format:** Radio buttons for HTML and Excel (selected).
- Receive as:** Radio buttons for Email Attachment (selected) and Hyperlink.

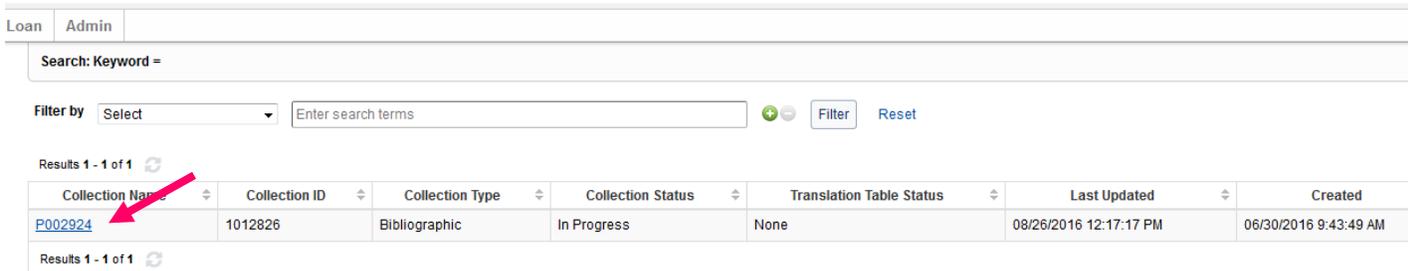
Example Data Sync Collection - Reports Blind

*II. Verify and adjust the settings as needed in your Backloading Data Sync Collection.*

To search for your Data Sync Collection, from the Collection Manager blind, select **Data Sync Collection**. Next, click the **Search** box.



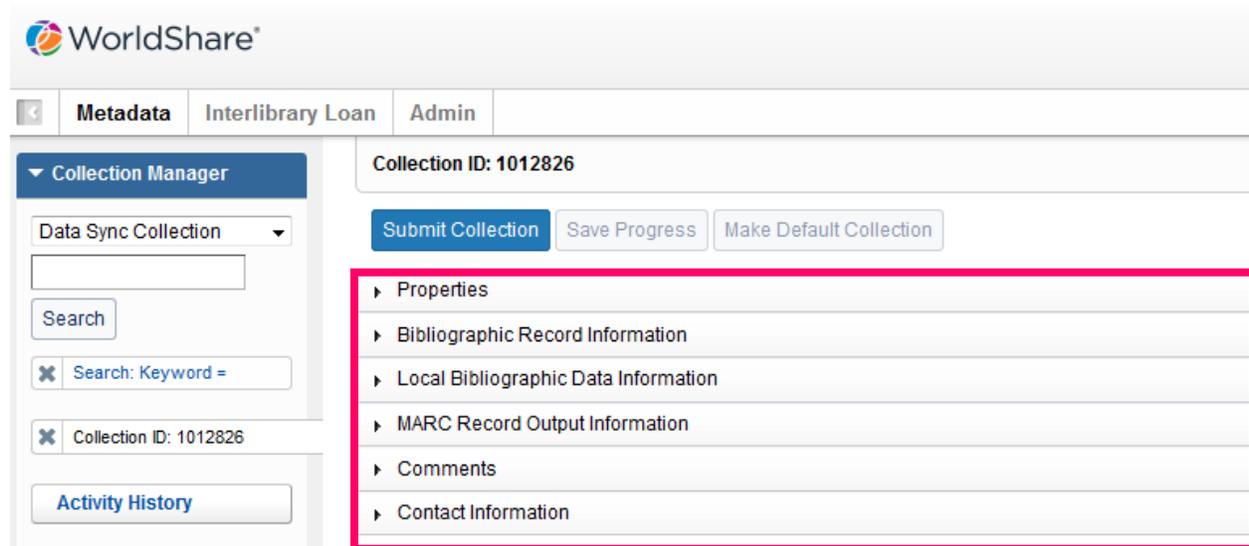
Then, select the highlighted Collection Name.



*Example Data Sync Collection Search Results*

Six collection-level blinds will become available for your review:

- Properties
- Bibliographic Record Information
- Local Bibliographic Data Information
- MARC Record Output Information
- Comments
- Contact Information



Example of Six Data Sync Collection Blinds

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

<b>Collection Name</b>	Add <b>parentheses</b> around the prepopulated <b>project ID</b> , then, add a more descriptive title to the beginning of the line: <b>Bibliographic Data Collection for Backloading Holdings</b> .
<b>Collection ID</b>	This number is systematically populated. It is the new reference ID for your data sync collection.
<b>Institution and Symbol</b>	System populated
<b>Group</b>	<b>No</b>
<b>WMS Library</b>	<b>No</b>
<b>Collection type</b>	<b>Bibliographic</b>

<b>Original Data Format</b>	<b>MARC</b>
<b>Use Record Status for Processing</b>	<b>adjust this to No</b>
<b>Default Data Sync Collection</b>	If this is your first data sync collection, it will automatically be set as the default.
	<The next four settings are system populated.>
<b>Description</b>	Prepopulated note, add “; data sent by CARLI”. This description will assist OCLC data analysts working on the project.

Click **Save Progress**.

**Collection Manager**

Data Sync Collection

Search

Search: Keyword =

Collection ID: 1012826

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

My Files

Collection ID: 1012826

Submit Collection Save Progress Make Default Collection

Properties

**Collection Name \*** Bibliographic Data Collection for Backloading Holdings (P002924)

**Collection ID** 1012826

**Institution** Parkland College

**Symbol** IAQ

**Group**  Yes  No

**WMS Library**  Yes  No

**Collection Type** Bibliographic

**Original Data Format**  MARC  Non-MARC

**Use Record Status for Processing**  Yes  No

**Default Data Sync Collection** Yes

**Created** 06/30/2016 9:43:49 AM by Batchload Transition

**Collection Last Updated** 08/26/2016 12:23:26 PM by Cliff Bishop

**Collection Status** Save In Progress

**Collection Status Last Updated** by Batchload Transition (68/500)

**Description** Pre-populated from previous Batch Load : P002924: data sent by CARLI

Example Data Sync Collection – Properties blind

2a. Select the **Bibliographic Record Information** blind – **System** tab and verify or add the following:

<b>Initial Estimate for Record Count</b>	<b>100</b>
<b>System Name</b>	prepopulated, <b>adjust this to Voyager Library (vendor Ex Libris, a ProQuest company)</b>
<b>Version</b>	<b>9.1.1</b>
<b>OCLC Number Location</b>	<b>035\$a</b>
<b>Local System Number Location(s)</b>	<b>001</b>

The screenshot shows the WorldShare interface for a Data Sync Collection. The main content area is titled 'Bibliographic Record Information' and is currently on the 'System' tab. The 'Initial Estimate for Record Count' is set to 100. The 'System Name' is 'Voyager Library (vendor Endeavor Information Systems)'. The 'Version' is '9.1.1'. The 'OCLC Number Location(s)' is '035 \$a'. The 'Local System Number Location(s)' is '001'. The interface also includes a sidebar with 'Collection Manager' options and a top navigation bar with 'Metadata', 'Interlibrary Loan', and 'Admin' tabs.

Example Data Sync Collection – Bibliographic Record Information blind – System tab

2b. Then, select the **Processing** tab on the **Bibliographic Record Information** blind and verify the following:

<b>Limit Added Records to WorldCat Staging</b>	<b>Yes</b>
<b>Replace Records in WorldCat</b>	<b>No</b>
<b>Use Language of Catalog (040 \$b) Field from Records</b>	<b>Yes</b>
<b>Use Excluded Information for Fixed Fields and Use Excluded Information for Variable Fields</b>	No values added

Click **Save Progress**.

The screenshot displays the 'Bibliographic Record Information' blind in the 'Processing' tab. On the left, a sidebar contains navigation options like 'Search', 'Collection ID: 1012826', 'Activity History', 'Approve Changes to Global Collections', 'View Recent Collections', 'Create a Collection', 'Settings', and 'My Files'. The main content area is titled 'Properties' and 'Bibliographic Record Information'. It includes an 'Initial Estimate for Record Count' set to 100. The 'Processing' tab is active, showing three main settings: 'Limit Added Records to WorldCat Staging' (radio button selected for 'Yes'), 'Replace Records in WorldCat' (radio button selected for 'No'), and 'Use Language of Cataloging (040 \$b) Field from Records' (radio button selected for 'Yes'). A note below the last setting states: 'This form field is relevant for institutions with a collection that has items that were primarily cataloged in a language other than English.' Below these settings is a 'Default Language of Cataloging Code' dropdown menu. At the bottom, there are two sections for 'Excluded Information'. The first is 'Excluded Information for Fixed Fields', which includes a form with fields for 'Tag' (dropdown), 'Type' (dropdown), 'Offset' (text input), 'Length' (text input), 'Condition' (dropdown), 'Value' (text area), and 'Action' (dropdown), along with a 'Reset' button. The second is 'Excluded Information for Variable Fields', which includes a form with fields for 'Tag' (text input), 'Ind 1' (dropdown), 'Ind 2' (dropdown), 'Subfield' (dropdown), 'Condition' (dropdown), 'Value' (text area), and 'Action' (dropdown), also with a 'Reset' button.

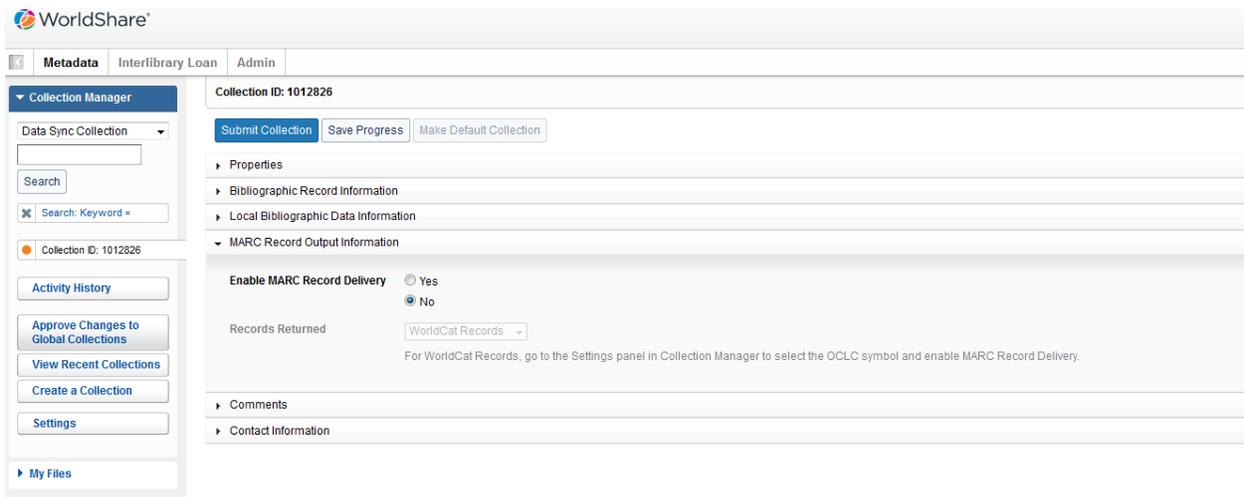
Example Data Sync Collection – Bibliographic Record Information blind – Processing tab

3. **Local Bibliographic Data Information blind** – only populate this if your institution creates LBDs in OCLC (WorldCat Local Users for example).

4. Select the **MARC Record Output Information** blind and adjust the Enable MARC Record Delivery setting:

<b>Enable MARC Record Delivery</b>	<b>adjust this to No</b>
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Click **Save Progress**.



Example Data Sync Collection – MARC Record Output Information blind

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

<b>Topic</b>	<b>Only OCLC # Matching</b>
<b>Comment</b>	<p><b>Please set this collection to use only OCLC number matching.</b></p> <p><b>This project only sets holdings in WorldCat; data sent from CARLI.</b></p> <p>(If your library creates LBDs as part of this project, also note that in this comment.)</p>

Click **Save Progress**.

Add Comment
✕

**Topic \***

**User** Nicole Swanson (128/4000)

**Comment \***

Example Data Sync Collection – Add Comment window

▼ Comments

[Add Comment](#)

Results 1 - 1 of 1

Topic	Comment	Date
<a href="#">Content</a>	Batch load project to set holdings in WorldCat; data sent from CARLI.	08/26/2016 12:04:45 PM

Results 1 - 1 of 1

Example Data Sync Collection – Comments blind display

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

<b>Two contacts for your institution</b>	
<b>Two CARLI contacts</b>	<ul style="list-style-type: none"> <li>• <b>Nicole Swanson, CARLI Library Services Coordinator, long20@uillinois.edu</b></li> <li>• <b>Gordon Fellows, CARLI Senior Research Programmer, fellows@uillinois.edu</b></li> </ul>

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

Click **Save Progress**.

▼ Contact Information

Fill out all of the contact information fields for at least one individual. We recommend that you provide the contact information for two to three individuals. List the contacts in order with the primary contact in the first row.

	Last Name	First Name	Title	Email Address	Action
↓	<input type="text" value="Swanson"/>	<input type="text" value="Nicole"/>	<input type="text" value="CARLI"/>	<input type="text" value="long20@uillinois.edu"/>	+ -
↑ ↓	<input type="text" value="Bishop"/>	<input type="text" value="Cliff"/>	<input type="text" value="Tech Services Librarian"/>	<input type="text" value="ctbishop@parkland.edu"/>	+ -
↑	<input type="text" value="Dossett"/>	<input type="text" value="Raeann"/>	<input type="text" value="Information Services Librarian"/>	<input type="text" value="rdossett@parkland.edu"/>	+ -

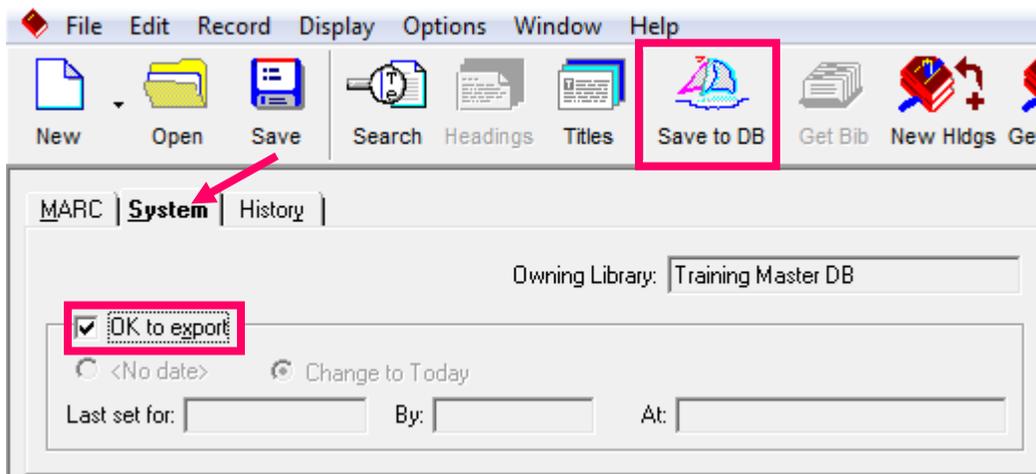
OCLC is a global library cooperative operating in more than 100 countries with the headquarters located in the United States. For information on how this contact information is used by OCLC, see the [Privacy Policy](#).

*Example Data Sync Collection – Contact Information blind*

Thank you for reviewing and adjusting your settings!

### III. Submit Five Test Records for Processing

As a final step, sometime between **September 3 – 15<sup>th</sup>, 2016**, please click **OK to export**, then **Save to DB** on at least **five** of your bibliographic records in the Voyager Cataloging Client which do not yet have holdings set in OCLC Connexion. The **OK to export** setting is found on the **System** tab of bibliographic records.



Example Voyager Cataloging Client –OK to Export setting

Write down and save the bibliographic record IDs of your test records. After the backloading test records are processed, your test record IDs can be used in conjunction with your data sync collection's bibliographic record processing report to check that your holdings were indeed added to WorldCat for the test records.