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 30rd, 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 3-15th** 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 15th, 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.

I. Check two Institution-Level Settings on the WorldShare Metadata - Collection Manager – Settings tab:
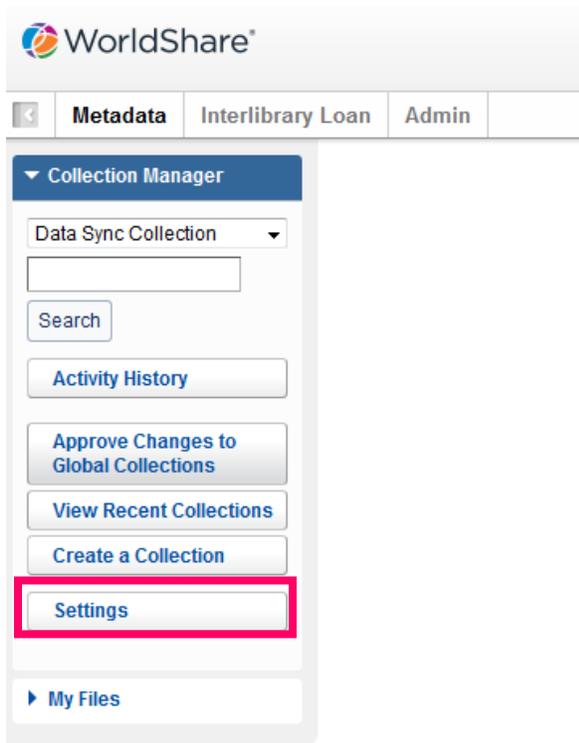
1. Select the **OCLC Symbol** blind.
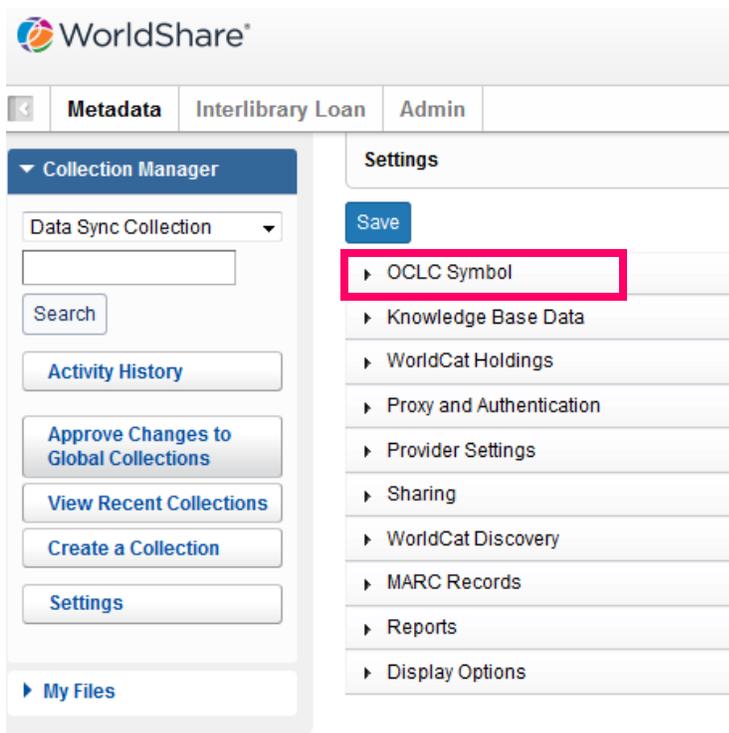
Then, verify your institution's OCLC symbol is selected. If it is not, add your OCLC symbol, then click **Save.**
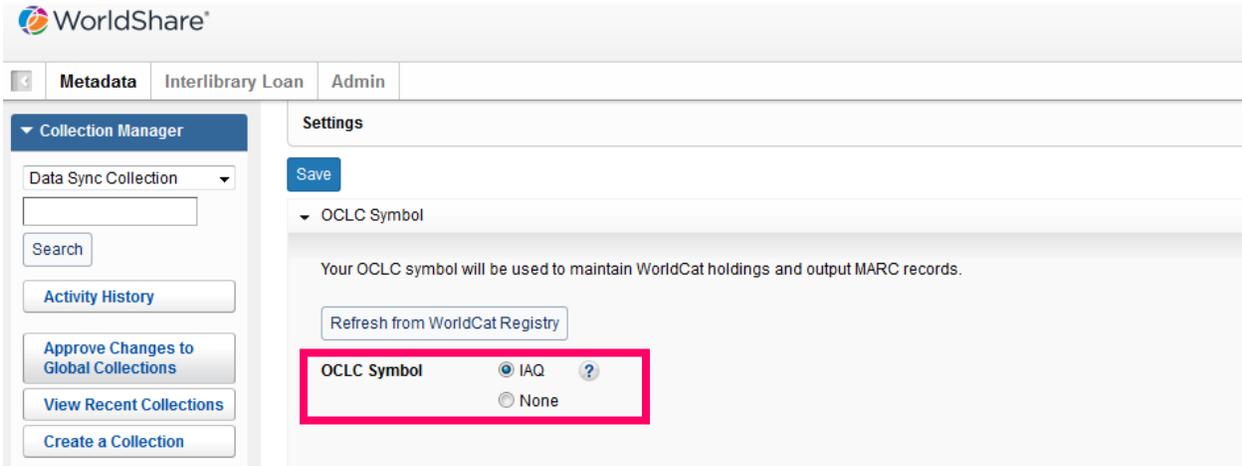
Example OCLC Symbol set for Parkland Community College

2. Select the **Reports** blind.
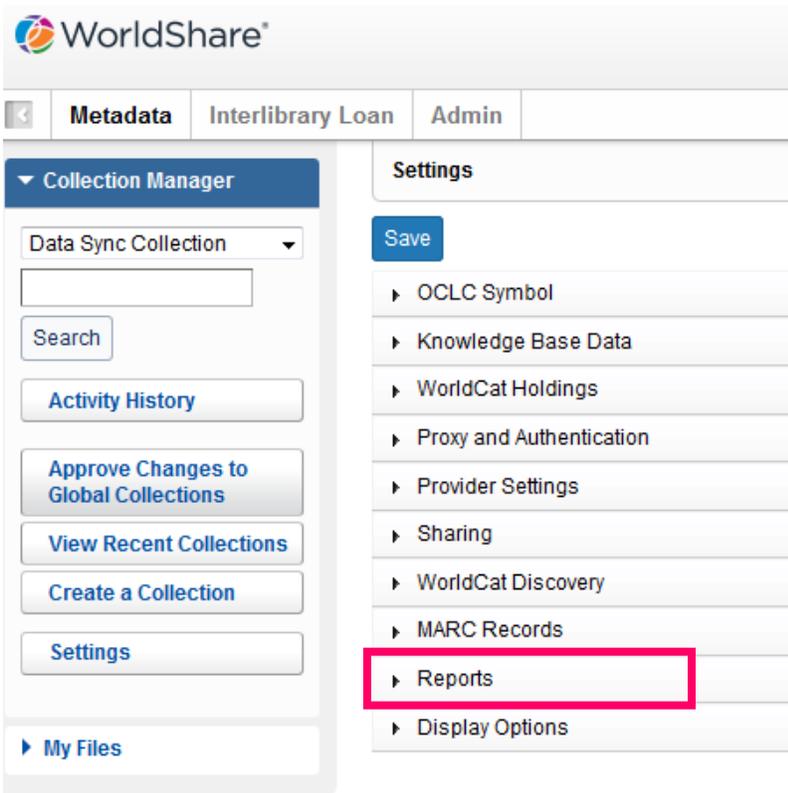
Then, enter or verify the following settings:

Receive Email Reports	Yes
Authorization code	your **9-digit cataloging authorization number**
Report Types	select **Data Sync Reports**, then **Bibliographic Record Processing**
Email Addresses	• enter **two** email contacts for your institution separated by a semi-colon • add CARLI contacts **long20@uillinois.edu** and **fellows@uillinois.edu** for 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.

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.
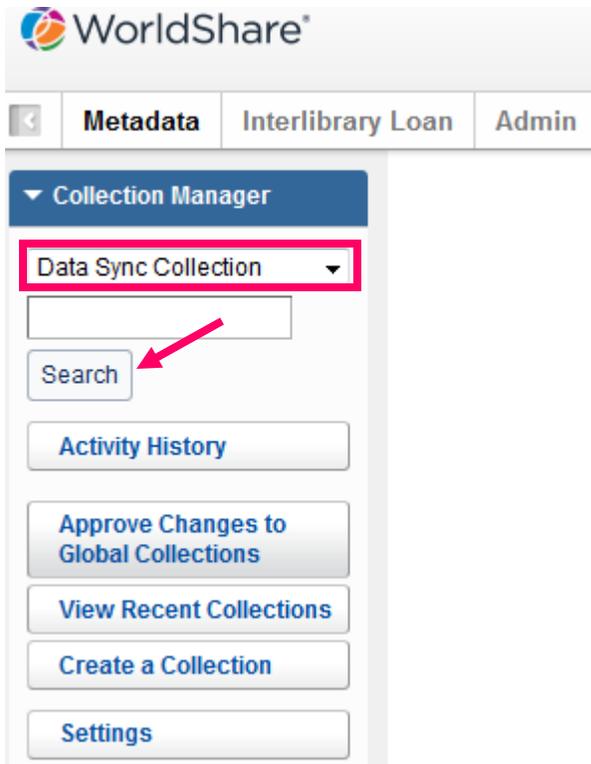
Then, select the highlighted Collection Name.
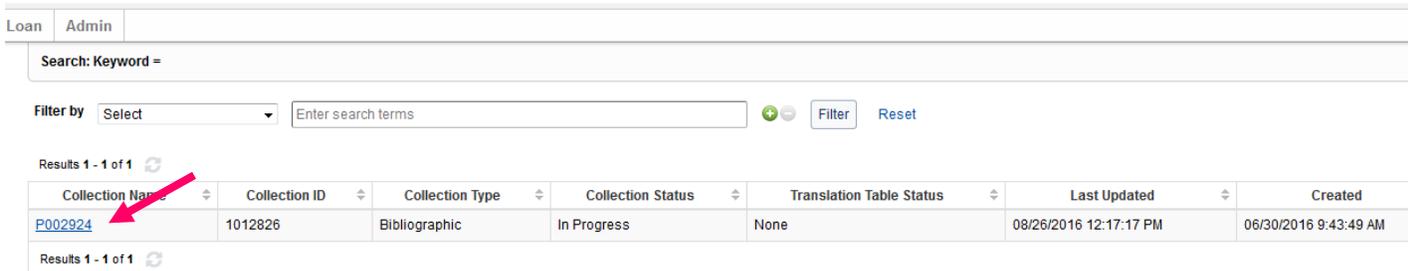
Example Data Sync Collection Search Results

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
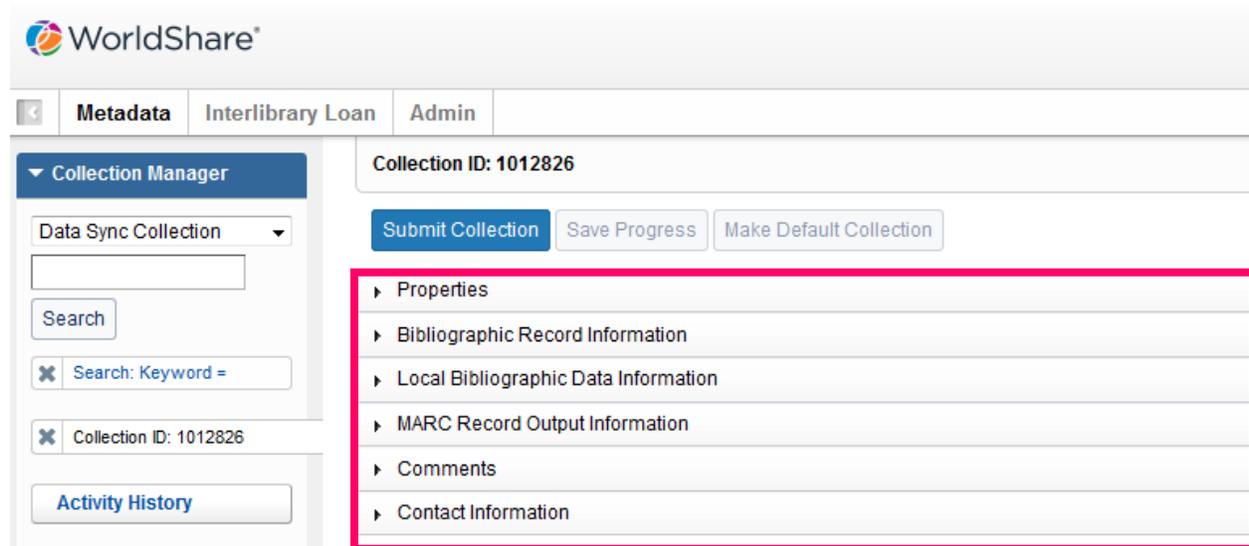
Example of Six Data Sync Collection Blinds

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

Collection Name	Add **parentheses** around the prepopulated **project ID**, then, add a more descriptive title to the beginning of the line: **Bibliographic Data Collection for Backloading Holdings**.
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	**Bibliographic**

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

Click **Save Progress.**

Example Data Sync Collection – Properties blind

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

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

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:

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

Click **Save Progress.**

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:

Enable MARC Record Delivery	adjust this to **No**

Click **Save Progress.**
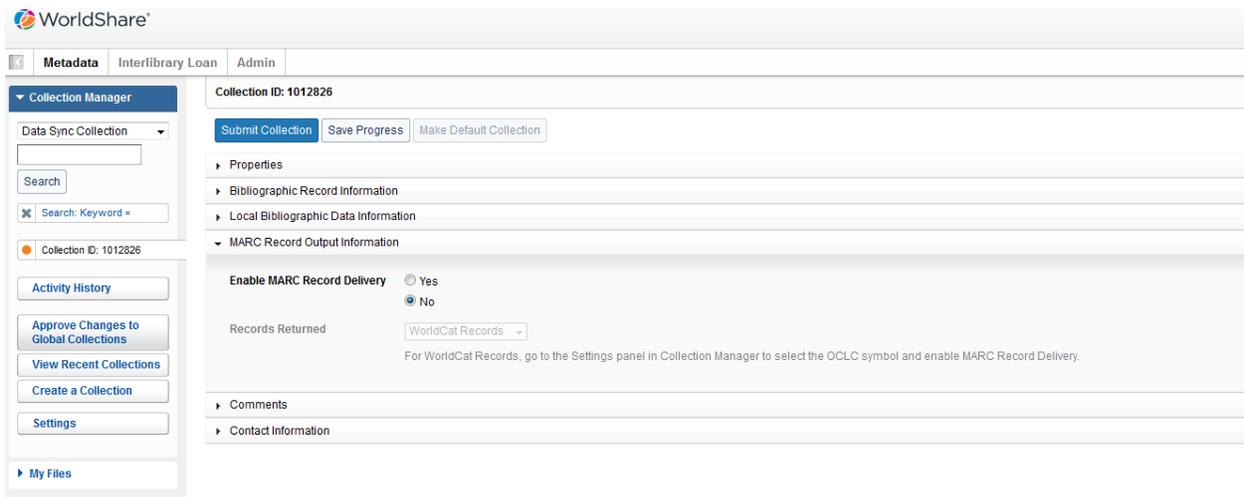
Example Data Sync Collection – MARC Record Output Information blind

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

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

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	• **Nicole Swanson, CARLI Library Services Coordinator, long20@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!

III. Submit Five Test Records for Processing

As a final step, sometime between **September 3 – 15th, 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.
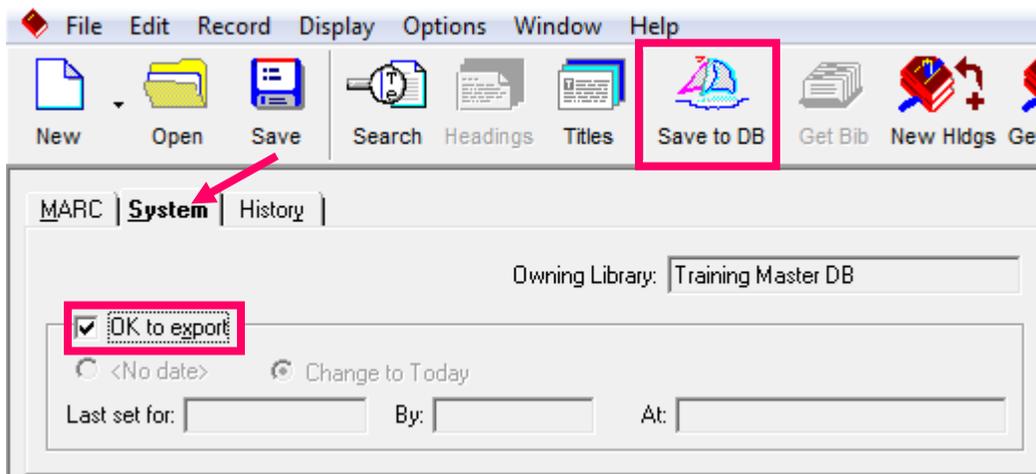
Example Voyager Cataloging Client –OK to Export setting

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.