

## Backloading Data Sync Collection Setup

I-Share institutions' backloading bibliographic data sync collections are set up in OCLC's WorldShare Metadata Collection Manager. The process of backloading holdings is described further in our [documentation](#).

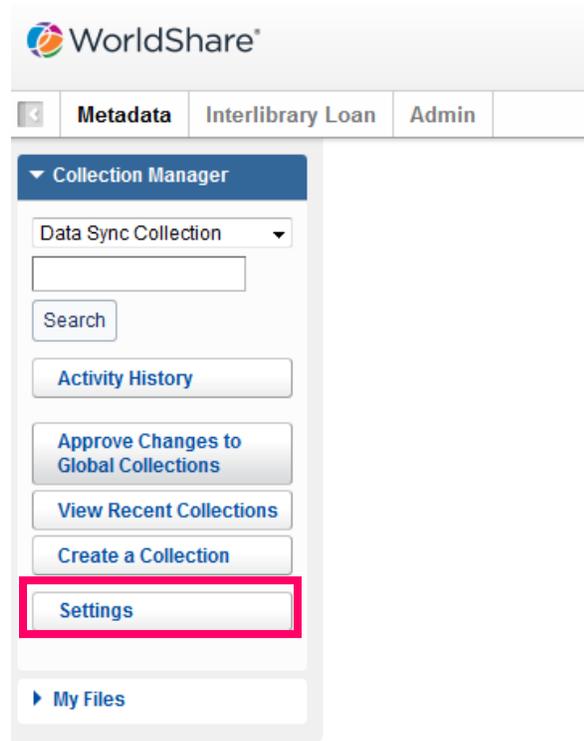
There are steps both your institution and CARLI will need to take to ensure your collection is enabled and functions as expected.

<p><b><i>Institutions should:</i></b></p>
<p>1. <b>Identify two people as the main contacts</b> for your data sync collection and share their names, job titles, and email address with CARLI for collection setup. (Often, contacts will include your I-Share Technical Services contact and/or Cataloging contact).</p> <p>Contacts need an OCLC Services account with Metadata services added. To request an account or add Metadata to an existing account, please follow OCLC's <a href="#">instructions</a>.</p>
<p>2. Share with CARLI the frequency backloading should occur for your library: monthly (default), weekly, or daily.</p>
<p>3. Share one <b>9-digit cataloging authorization number</b> (beginning with 100) with CARLI for collection setup. Please do not share your password.</p>
<p>4. <b>Review the configuration settings</b> CARLI sets up using the recommended settings below. Please let CARLI know when you complete your review.</p> <p><b><i>Do not click the "Submit Collection" button</i></b> during your review. Once a collection is submitted, most of the settings will no longer be available to edit. Please only save any changes during your review by clicking <b><i>Save Progress</i></b> or <b><i>Save</i></b>.</p>
<p>5. In the Voyager Cataloging client, <b>select "OK to export", then Save to DB on at least five bibliographic records</b> to use as a test set. These 5 records should not yet have holdings set in WorldCat (described further below). Please share the bib ids and OCLC numbers for those records selected for your test with CARLI.</p>

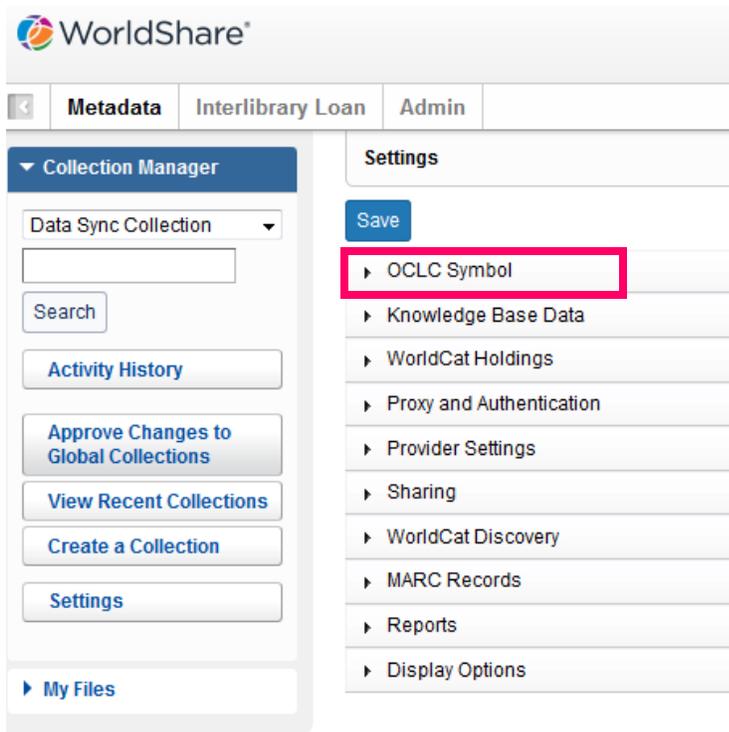
**CARLI will:**

1. Create your data sync collection and enter the initial collection settings for your review.
2. Complete a final review of your collection's settings.
3. Submit the collection to OCLC for their review.
4. Send your bibliographic records with "OK to export" selected to OCLC to test the collection configuration and send future records based on the frequency you specify.
5. Use the returned processing report to confirm that the collection did indeed add your holdings to WorldCat.
6. Remove CARLI access to receive data sync reports once the collection is operating as expected.

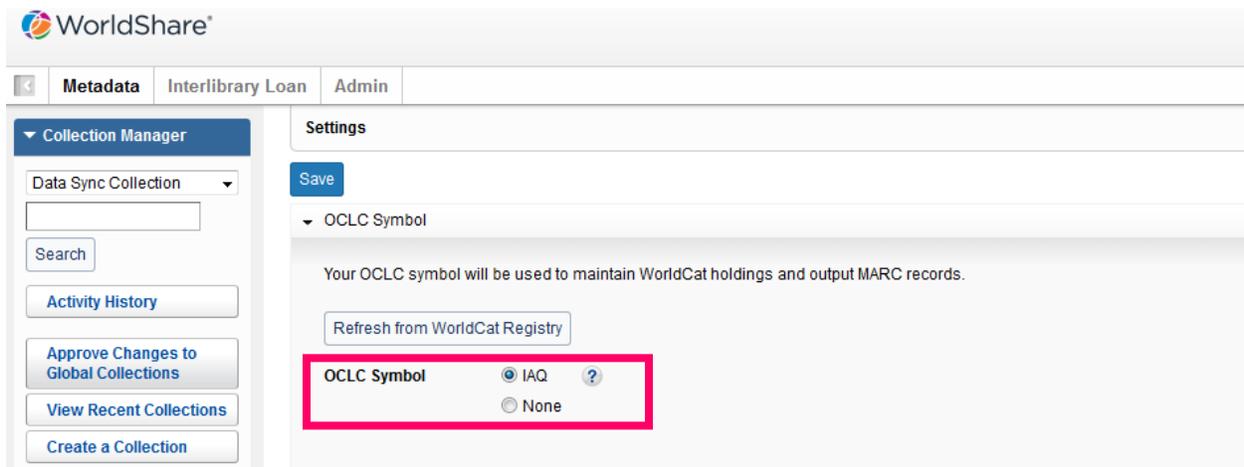
***I. Two Institution-Level Settings in WorldShare Metadata Collection Manager on the Settings tab:***



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



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



*Example OCLC Symbol set for Parkland Community College*

2. Select the **Reports** blind.

[←](#)
[Metadata](#)
[Interlibrary Loan](#)
[Admin](#)

**Collection Manager**

Data Sync Collection ▾

Search

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

My Files

**Settings**

Save

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

Then, verify or add the following settings:

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

Click **Save** to retain any changes.

**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)\***

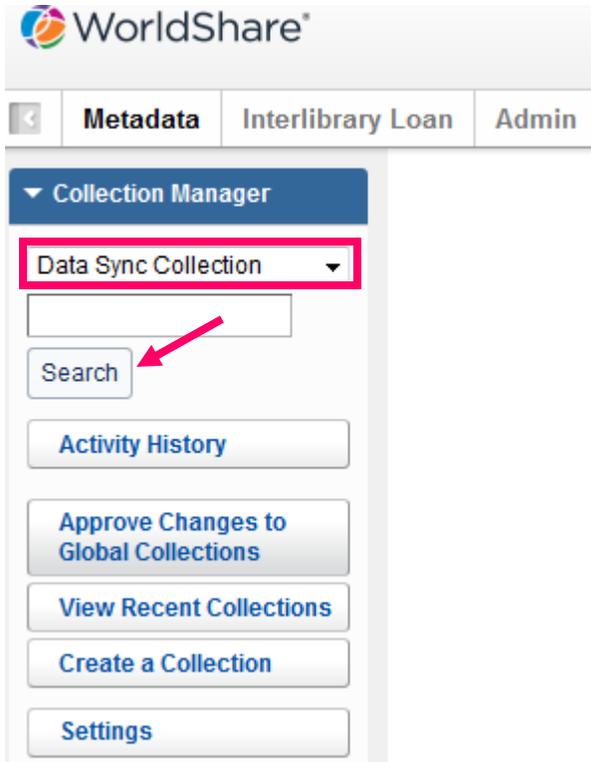
**Report Format**  HTML  
 Excel

**Receive as**  Email Attachment  
 Hyperlink

*Example Data Sync Collection - Reports Blind*

## II. Backloading Data Sync Collection Settings

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 **Backloading Holdings**. (Migrated projects initially will have the former project id P00#### as the Collection Name.)

Loan Admin

Search: Keyword =

Filter by Select Enter search terms Filter Reset

Results 1 - 1 of 1

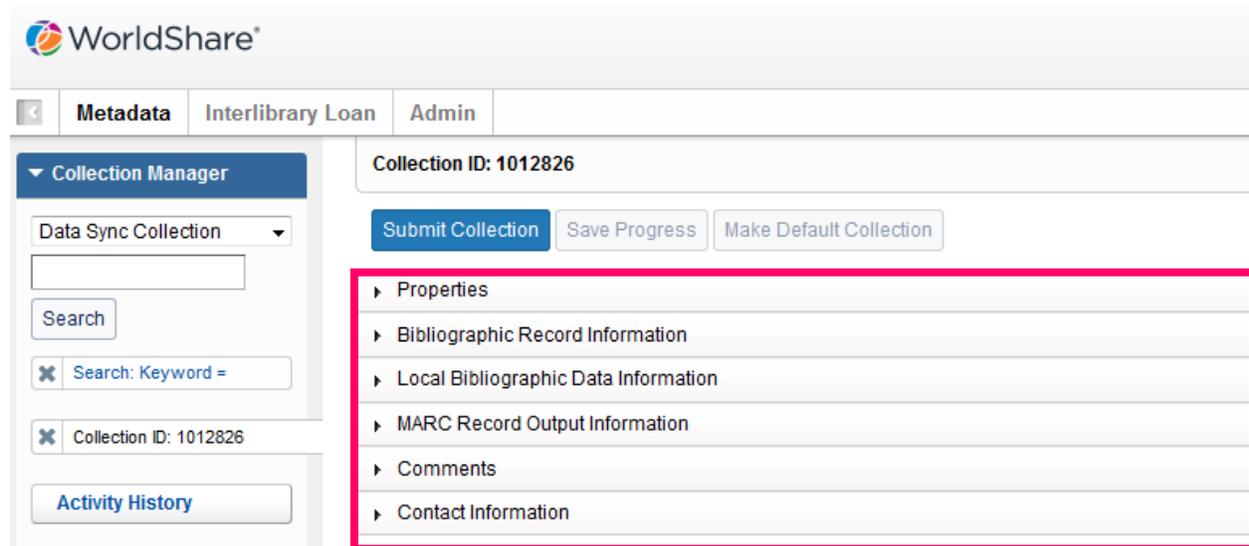
Collection Name	Collection ID	Collection Type	Collection Status	Translation Table Status	Last Updated	Created
<a href="#">P002924</a>	1012826	Bibliographic	In Progress	None	08/26/2016 12:17:17 PM	06/30/2016 9:43:49 AM

Results 1 - 1 of 1

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>	<b>Backloading Holdings</b> added. Migrated projects should have <b>parentheses</b> around the prepopulated <b>project ID</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>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>	<b>This collection sets holdings only and should be set for OCN matching only. Data is sent from CARLI.</b> <This information is also added in the Comments blind.>

Click **Save Progress** to save any changes.

▼ Properties

<b>Collection Name *</b>	<input type="text" value="Backloading Holdings (P00####)"/>
<b>Collection ID</b>	New
<b>Institution</b>	Consortium of Academic and Research Libraries in Illinois
<b>Symbol</b>	ILL
<b>Group</b>	<input type="radio"/> Yes <a href="#">?</a> <input checked="" type="radio"/> No
<b>WMS Library</b>	<input type="radio"/> Yes <a href="#">?</a> <input checked="" type="radio"/> No
<b>Collection Type</b>	<input type="text" value="Bibliographic"/> ▼
<b>Original Data Format</b>	<input checked="" type="radio"/> MARC <input type="radio"/> Non-MARC
<b>Use Record Status for Processing</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Default Data Sync Collection</b>	No
<b>Created</b>	12/22/2017 10:04:44 AM by Nicole Swanson
<b>Collection Last Updated</b>	12/22/2017 10:04:44 AM by Nicole Swanson
<b>Collection Status</b>	None
<b>Collection Status Last Updated</b>	12/22/2017 10:04:44 AM by Nicole Swanson
<b>Description</b>	<input type="text" value="This collection sets holdings only and should be set for OCN matching only. Data is sent from CARLI."/> <span style="float: right;">(100/500)</span>

*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>	<b>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>

Collection ID: 1012826

▶ Properties  
 ▼ Bibliographic Record Information

Initial Estimate for Record Count \*

System

Provider   
 System Name   
 Version   
 OCLC Number Location(s)
 

Location	035 \$a ▼	Tag	035	Subfield	a	<input type="button" value="+"/>	<input type="button" value="-"/>
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Local System Number Location(s) \*
 

Location	001 ▼	Tag	001	Subfield		<input type="button" value="+"/>	<input type="button" value="-"/>
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▶ Local Bibliographic Data Information  
 ▶ MARC Record Output Information  
 ▶ Comments  
 ▶ Contact Information

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

2b. Then, select the **Processing** tab on the **Bibliographic Record Information** blind and verify or add 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** to save any changes.

▶ Properties  
 ▼ Bibliographic Record Information

Initial Estimate for Record Count \*

System Processing

**Limit Added Records to WorldCat Staging**  Yes ?  
 No

**Replace Records in WorldCat**  Yes ?  
 No

**Use Language of Cataloging (040 \$b) Field from Records** This form field is relevant for institutions with a collection that has items that were primarily cataloged in a language other than English.  
 Yes ?  
 No

Default Language of Cataloging Code \*  ?

<p><b>Excluded Information for Fixed Fields</b></p>	<p>For information that you want to exclude from processing, enter the location information (such as the Tag, Type, Offset, or Length), the value that appears in that location, and the action that needs to be taken.</p> <p>Tag <input type="text" value="Select"/> Type <input type="text" value="Select"/> Offset <input type="text"/> Length <input type="text"/> <span style="float: right;">+ -</span></p> <p>Condition <input type="text" value="Exists"/></p> <p>Value <input type="text"/></p> <p>Action <input type="text" value="Select"/></p> <p><a href="#">Reset</a></p>
<p><b>Excluded Information for Variable Fields</b></p>	<p>For information that you want to exclude from processing, enter the location information (such as the Tag, Indicators, or Subfields), the value that appears in that location, and the action that needs to be taken.</p> <p>Tag <input type="text"/> Ind 1 <input type="text" value="Select"/> Ind 2 <input type="text" value="Select"/> Subfield <input type="text" value="Select"/> <span style="float: right;">+ -</span></p> <p>Condition <input type="text" value="Exists"/></p> <p>Value <input type="text"/></p> <p>Action <input type="text" value="Select"/></p> <p><a href="#">Reset</a></p>

*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 verify or adjust the Enable MARC Record Delivery setting:

<b>Enable MARC Record Delivery</b>	<b>No</b>
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Click **Save Progress** to save any changes.

Collection ID: 1012826

- ▶ Properties
- ▶ Bibliographic Record Information
- ▶ Local Bibliographic Data Information
- ▼ MARC Record Output Information
  - Enable MARC Record Delivery
    - Yes
    - No
  - Records Returned
    - WorldCat Records

For WorldCat Records, go to the Settings panel in Collection Manager to select the OCLC symbol and enable MARC Record Delivery.
- ▶ Comments
- ▶ Contact Information

Example Data Sync Collection – MARC Record Output Information blind

5. On the **Comments** blind, verify or add the following comment(s):

Topic	OCN Matching ONLY
Comment	<p><b>This collection sets holdings only and should be set for OCN matching only. Data is sent from CARLI.</b></p> <p>(Please note in a comment if your library creates LBDs as part of this project.)</p>

Click **Save Progress** to save any changes.

Add Comment ✕

Topic \*

User  (100/4000)

Comment \* 

This collection sets holdings only and should be set for OCN matching only. Data is sent from CARLI.

Example Data Sync Collection – Add Comment window

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
↓	Swanson	Nicole	CARLI	long20@uillinois.edu	⊕ ⊖
↕	Bishop	Cliff	Tech Services Librarian	clbishop@parkland.edu	⊕ ⊖
↑	Dossett	Raeann	Information Services Librarian	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

### III. Five Test Records for Processing

As a final step, please click **OK to export**, then **Save to DB** on at least **five** of your bibliographic records in your Voyager Cataloging Client. These records should not yet have holdings set in OCLC Connexion. The **OK to export** setting is found on the **System** tab of bibliographic records.

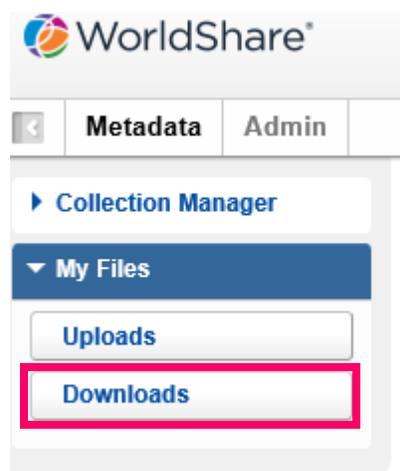
The screenshot shows the Voyager Cataloging Client interface. The menu bar includes File, Edit, Record, Display, Options, Window, and Help. The toolbar contains icons for New, Open, Save, Search, Headings, Titles, Save to DB (highlighted with a red box), Get Bib, New Hldgs, and Get. Below the toolbar, the 'System' tab is selected, and the 'OK to export' checkbox is checked (highlighted with a red box). The 'Owning Library' field is set to 'Training Master DB'. There are also radio buttons for '<No date>' and 'Change to Today', and input fields for 'Last set for:', 'By:', and 'At:'.

Example Voyager Cataloging Client –OK to Export setting

Write down and save the bibliographic record IDs and OCLC numbers from your test records. Please share these with CARLI. After the backloading test records are processed, the test record IDs and OCLC numbers 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.

#### IV. Reviewing Cross-Reference Reports

When your backloading data sync collection processes, you should receive a report through email with the subject line: Bibliographic Record Processing Summary -- Data Synchronization. The report will be attached in an Excel file. Within 24 hours of receiving this email, you will have access to your cross-reference reports and possibly a detailed exception file for 90 days in WorldShare Metadata Collection Manager -- My Files -- Downloads.



The results in My Files - Downloads can be filtered by Reports to help narrow the results.

Downloads

Filter by  [Reset](#)

Results 11 - 20 of 59 ↻ Row

File Name	File Type	Size	Post Date
metacoll.ICE.datasync.1012635-1012635.D20171109.T010620313.xrefrpt.txt	Reports	1 KB	11/14/2017
metacoll.ICE.datasync.1012635-1012635.D20171109.T010620313.unresxrefrpt.txt	Reports	4 KB	11/14/2017

Report file names will begin with metacoll.XXX.datasync (where XXX is replaced with your three-character OCLC symbol) followed by your collection ID. Cross-reference report file names end with .xrefrpt.txt and unresolved cross-reference reports end with unresxrefrpt.txt. You may also receive a detailed exception file, bibdetailexcpt.1.mrc.txt, to assist you with any unresolved records.

The files are easily read in Excel or WordPad, but we recommend avoiding basic Notepad since the column structure will be lost.

Cross-reference reports (.xrefrpt.txt) list your local Voyager bib ids sent to OCLC in the left column, and list the corresponding OCLC numbers that matched in the right column. Your institution's holdings were added to all of the WorldCat records represented by these OCLC numbers.

*Example of a Cross-Reference Report (xrefrpt.txt)*

Bib id column	1213776	6273862	Matching OCLC numbers column representing WorldCat records where holdings were set.
	1213777	2842723	
	1213772	13878867	
	1212484	1006508884	
	1212483	1006508283	

Unresolved cross-reference reports (unresxrefrpt.txt) list those records which did not match on existing WorldCat records and no holdings were added to indexed records in WorldCat. Instead, these records were added to WorldCat Staging and are available for review for 180 days before they are deleted by OCLC's processing. They can be reviewed in OCLC Connexion using the temporary OCLC numbers assigned in the report.

Your backloading profile should match only on OCLC numbers. If records are placed in an unresolved file, it is likely they lacked an OCLC control number. Please review any unresolved records since your holdings were not added to the appropriate WorldCat records. Often the best workflow is to search the bib id in your Voyager database to check for any OCLC numbers in the records that should have matched existing WorldCat records.

*Example of an Unresolved Cross-Reference Report (unresxrefrpt.txt)*

Bib id column	1132918	1002290890	WorldCat Staging ids column (not the OCLC number in your bib record)
	1748473	1002301583	
	2953107	1002297261	
	2078901	1002299315	
	1220376	1002295051	

*Using the bib ids listed in the left column of the unresxrefrpt.txt, search for the bibs in the Voyager Cataloging Client and check for any OCLC numbers.*

Voyager Cataloging - [Bib 1132918 : Concerto pour quatuor à cordes /

File Edit Record Display Options Window Help

New Open Save Search Headings Titles Save to DB S

MARC | System | History |

Suppress from OPAC

Leader: 01447ccm a2200397 i 4500 006

005: 20170830093511.0 007

008: 750423 t 1969 1969 fr \_ \_ l \_ \_ \_ \_ \_ n \_ \_ zxx \_ c

Tag	I1	I2	Subfield Data
010			‡a 73240711
035			‡a (OCoLC)on1000154972

OCLC number in bib record

If you receive unresolved records and believe these should have matched existing WorldCat records, please let us know at [support@carli.illinois.edu](mailto:support@carli.illinois.edu). We are tracking any issues (listed below) and will report them to OCLC.

If you plan to update unresolved records in your Voyager database by overlaying or adding OCLC numbers, please follow the safe bibliographic record replacement routine: <https://www.carli.illinois.edu/products-services/i-share/cat/safelibrep> and suppress the records first, wait the appropriate amount of time, then make the change. This will ensure the changes will correctly be reflected in the I-Share Union Catalog.

**Issues reported:**

9/19/2017: OCLC 10-digit control numbers are being discarded from data sync matching during backloading (note unresolved example above). As of 12/22/2017, OCLC continues to work on this issue.