

Local Holdings Records Data Sync Collection Migration

OCLC has migrated all I-Share institutions' Local Holding Record (LHR) projects to data sync collections in OCLC's WorldShare Metadata Collection Manager platform.

Between now and October 14th, 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 LHR 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 LHR data sync collection in Collection Manager using the recommended institution and collection-level settings identified below.

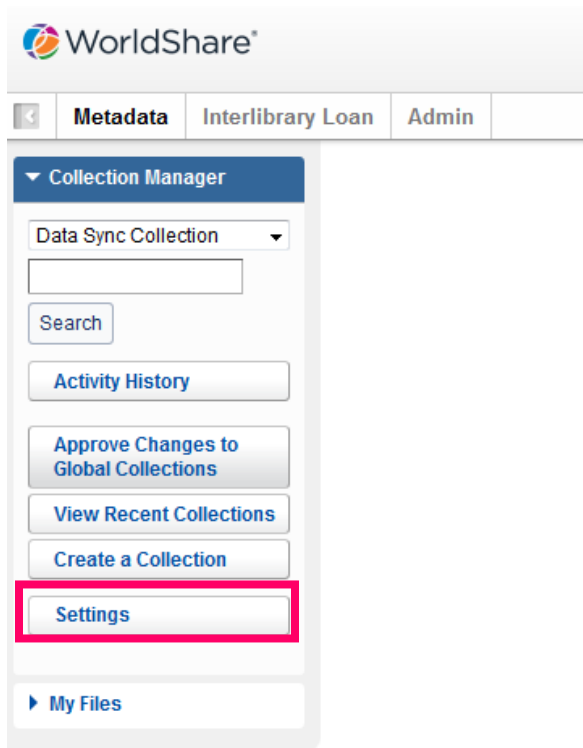
Do not click the "Submit Collection" button while you are reviewing your collection. Once a collection is submitted, most of the settings will no longer be available to edit. Please only save your changes as you review by clicking *Save Progress* or *Save*.

3. Review the returned processing report for the October 21, 2016 files to confirm that the data sync collection did indeed add your local holdings records.

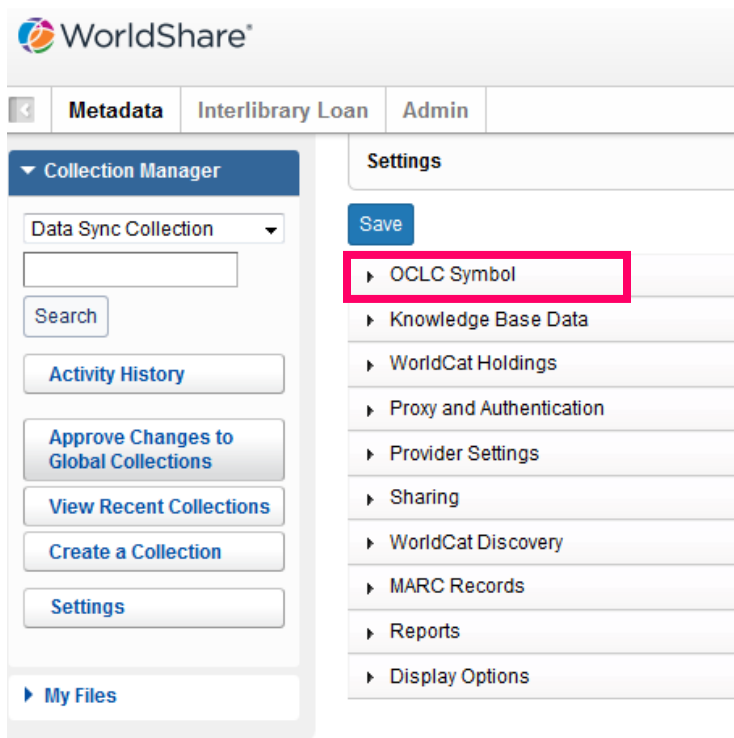
CARLI will:

1. Complete a final review of your collection's settings.
2. Submit the collection to OCLC for their review.
3. Send your LHR files to OCLC October 21, 2016 to test the new collection configuration.
4. Confirm with you that the LHRs were added as expected when the LHR processing reports are sent.

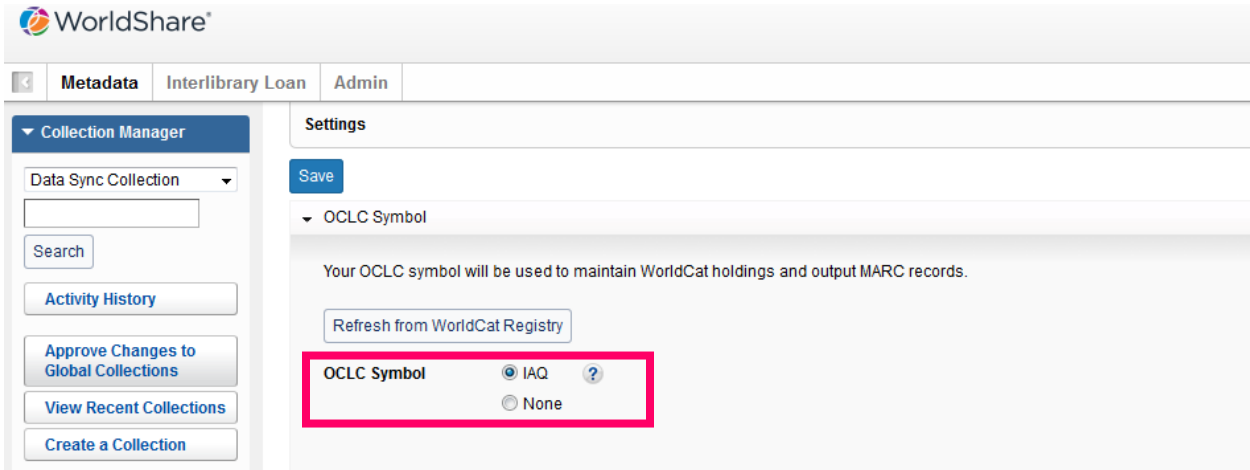
1. Check two Institution-Level Settings on the WorldShare Metadata - Collection Manager – Settings tab:



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:

Receive Email Reports	Yes
Authorization code	your 9-digit cataloging authorization number
Report Types	<ul style="list-style-type: none">• Select Data Sync Reports, then select both LHR Processing and LHR Processing Exceptions• Verify Bibliographic Record Processing is already selected for your backloading collection
Email Addresses	<ul style="list-style-type: none">• Verify there are two email contacts for your institution separated by a semi-colon• Verify that CARLI contacts long20@uillinois.edu and fellows@uillinois.edu added for the backloading project are already listed• Add CARLI contact jmasciad@uillinois.edu for LHR 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.

▼ Reports

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

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) * ?

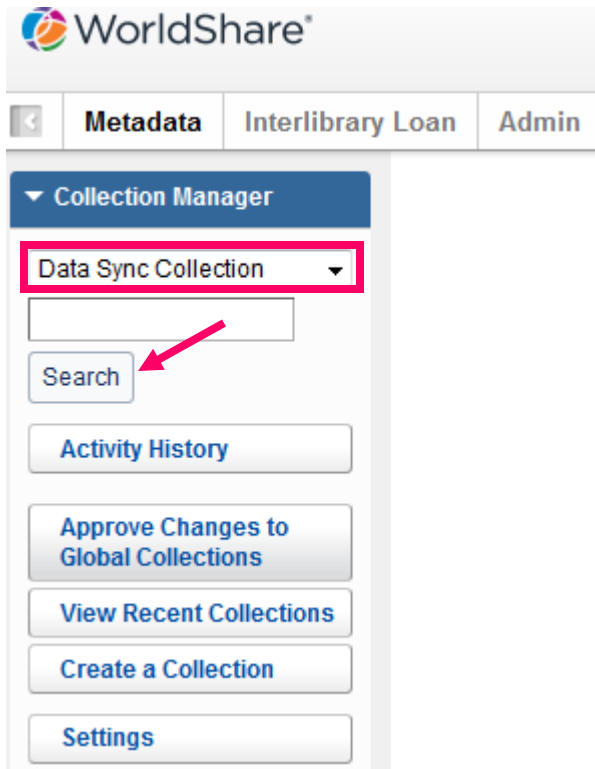
Report Format HTML
 Excel

Receive as Email Attachment
 Hyperlink

Example Data Sync Collection - Reports Blind

II. Verify and adjust the settings as needed in your Local Holdings Records 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 Local Holdings Records Collection Name. This will initially display your former LHR project ID.


Collection Name	Collection ID	Collection Type	Collection Status	Translation Table Status
(P002341) Bibliographic Data Collection for Backloading Holdings	1012625	Bibliographic	In Progress	None
P011746 files sent from CARLI	1017001	Local Holdings Records	In Progress	None

Example Data Sync Collection Search Results

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

- Properties
- Local Holdings Records Information
- Comments
- Contact Information

Collection ID: 1018901

 Saved the collection.

- ▶ Properties
- ▶ Local Holdings Records Information
- ▶ Comments
- ▶ Contact Information

Example of Four 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 and remove files sent from CARLI (this is added already below), then, add a more descriptive title to the beginning of the line: Local Holdings Records Collection .
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	Local Holdings Records
Original Data Format	MARC
Use Record Status for Processing	Yes
Remove WorldCat	No

Holdings When Final LHR Deleted	
Default Data Sync Collection	No, unless this is your first data sync collection. In which case, it will automatically be set as the default.
	<The next five settings are system populated.>
Description	Prepopulated note, ensure it includes “files sent from CARLI” . This description will assist OCLC data analysts working on the project.

Click **Save Progress**.

▼ Properties

Collection Name *	<input type="text" value="Local Holdings Records Collection (P011815)"/>
Collection ID	1018901
Institution	Northeastern Illinois University
Symbol	IAO
Group	<input type="radio"/> Yes ? <input checked="" type="radio"/> No
WMS Library	<input type="radio"/> Yes ? <input checked="" type="radio"/> No
Collection Type	<input style="border: 1px solid #ccc;" type="text" value="Local Holdings Records"/>
Original Data Format	<input checked="" type="radio"/> MARC <input type="radio"/> Non-MARC
Use Record Status for Processing	<input checked="" type="radio"/> Yes ? <input type="radio"/> No
Remove WorldCat Holding When Final LHR Deleted	<input type="radio"/> Yes <input checked="" type="radio"/> No
Default Data Sync Collection	No
Created	08/19/2016 10:04:06 AM by Onno Van Belzen
Collection Last Updated	09/21/2016 10:06:55 AM by Denise Cirignani
Collection Status	Save In Progress
Collection Status Last Updated	08/19/2016 11:02:30 AM by Onno Van Belzen
Translation Table Status	None
Description	<input style="border: 1px solid #ccc;" type="text" value="Transitioned LHRUS project P011815; files sent from CARLI"/>

(57/500)

Example Data Sync Collection – Properties blind

2a. Select the **Local Holdings Records Information** blind – **MFHD** tab and verify or add the following:

Initial Estimate for Record Count	Add 200
Provider	<blank>
System Name	Voyager Library (vendor Ex Libris, a ProQuest company)
Version	9.1.1
OCLC Number Location	035\$a
Local System Holdings Record Number Location(s)	001
Local System Bibliographic Record Number Location(s)	004

Local Holdings Records Information

MFHD Processing

Initial Estimate for Record Count *

System Information

Provider

System Name

Version

OCLC Number Location * Location Tag Subfield

Local System Holdings Record Number Location(s) Location Tag Subfield

Local System Bibliographic Record Number Location(s) Location Tag Subfield

Example Data Sync Collection – Local Holdings Records Information blind – MFHD tab

2b. Then, select the **Processing** tab on the **Local Holdings Records Information** blind and verify the following:

Use Acquisition Status Value	No
Excluded Information for Fixed Fields	No values added
Excluded Information for Variable Fields	No values added

Click **Save Progress**.

The screenshot shows the 'Processing' tab of the 'Local Holdings Records Information' blind. It contains three main sections:

- Use Acquisition Status Value:** Radio buttons for 'Yes' and 'No'. 'No' is selected.
- Excluded Information for Fixed Fields:** A section with a descriptive text: "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." Below this is a form with fields for 'Tag' (dropdown), 'Type' (dropdown), 'Offset' (text), 'Length' (text), 'Condition' (dropdown), 'Value' (text area), and 'Action' (dropdown). A 'Reset' link is at the bottom.
- Excluded Information for Variable Fields:** A section with a descriptive text: "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." Below this is a form with fields for 'Tag' (text), 'Ind 1' (dropdown), 'Ind 2' (dropdown), 'Subfield' (dropdown), 'Condition' (dropdown), 'Value' (text area), and 'Action' (dropdown). A 'Reset' link is at the bottom.

Example Data Sync Collection – Local Holdings Records Information blind – Processing tab

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

Topic	Content
Comment	LHR project; files sent from CARLI.

Click **Save Progress**.

Example Data Sync Collection – Add Comment window

Topic	Comment	Date Created	User
Content	LHR project; files sent from CARLI.	09/20/2016 4:59:13 PM	Denise Cirignani

Example Data Sync Collection – Comments blind display

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

Two contacts for your institution	
Two CARLI contacts	<ul style="list-style-type: none"> • Jennifer Masciadrelli, Senior Project Management Coordinator, jmasciad@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**.

▼ 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="Schuitema"/>	<input type="text" value="Joan"/>	<input type="text" value="Coordinator of Technical Services for NEIU's I"/>	<input type="text" value="J-Schuitema@neiu.edu"/>	+ -
↑ ↓	<input type="text" value="Cirignani"/>	<input type="text" value="Denise"/>	<input type="text" value="Library Operations Associate for Cataloging I"/>	<input type="text" value="D-Cirignani@neiu.edu"/>	+ -
↑ ↓	<input type="text" value="Masciadrelli"/>	<input type="text" value="Jennifer"/>	<input type="text" value="CARLI Project Coordinator"/>	<input type="text" value="jmasciad@uillinois.edu"/>	+ -
↑	<input type="text" value="Fellows"/>	<input type="text" value="Gordon"/>	<input type="text" value="CARLI Senior Research Programmer"/>	<input type="text" value="fellows@uillinois.edu"/>	+ -

Example Data Sync Collection – Contact Information blind

Thank you for reviewing and adjusting your settings!

Once settings are confirmed, CARLI staff will submit your LHR project and upload your next set of LHR files to test the new collection.

When you receive the LHR Processing and LHR Processing Exceptions reports from October 21, 2016, please review and confirm with CARLI at support@carli.illinois.edu that the LHRs were added as expected.