2019 OCLC Data Sync Project Information

Charge

Building on the foundational work of the OCLC Data Sync and WorldShare Working Group, the OCLC Data Sync Project Team will begin to reconcile Alma holdings for physical, and locally digitized materials in OCLC. A new streamlined set of OCLC Symbols, approved by library leadership in February 2019, will be maintained for Harvard Library to ensure efficiencies in resource sharing and cataloging. The list of Harvard Library current and target OCLC Symbols is available on the project wiki. This group will recommend workflow and process changes needed to complete the following tasks:

1. **Workflow/procedure decisions.** Project team will determine processes for each step of the export process, update of holdings post-synchronization, and necessary changes to cataloging and ILL workflows. This work includes:
   a. plan for distribution of new OCLC authorizations (process to be designed and executed by the OCLC Coordination Working Group)
   b. error report distribution and resolution
   c. creation of Local Holdings Records in OCLC (LHRs)
   d. impact on WorldShare Collection Manager & WorldCat Updates loads for deferred cataloging processes.
   e. preparation and dissemination of cataloging and ILL process and workflow documentation, including review of existing workflows
   f. ILL configuration and data mapping

2. **Implement LHR Data Sync Collections.** This work includes:
   a. testing options in Alma for publishing LHR
   b. evaluating and recommending best option
   c. working with OCLC to test LHR Data Sync processing

3. **Create timeline per symbol.** Project team will work with OCLC to confirm a draft timeline for each symbol that includes bibliographic reclamation, LHR load, and implementation of incremental bibs/LHR updates

4. **Data Synchronization.** LTS will engage in an iterative process to export full bibs and holdings records for each symbol, and manage the transition to ongoing updates.

5. **Automation of ongoing exports.** LTS will develop scripts to automate ongoing exchange of data with OCLC. This work will be done as each symbol is reclaimed. This work includes:
   a. designing integrated process for exports, file ingest, and error reports
   b. publishing incremental bib/LHR updates from Alma
   c. exporting Alma files to OCLC
   d. ingesting files from OCLC into Alma
   e. ongoing distribution of error reports to staff for resolution.

6. **OCLC Local Holdings Records.** In addition to setting a symbol on a record, project team will define a process to create separate holdings records in OCLC to provide additional details about our collections.

7. **Shared retention statements.** Project team will define a process to add shared retention statements to OCLC records for records marked in Alma as permanently retained.

Governance

This group reports to the Alma Executive Oversight Committee.

Group Membership

- Allison Powers, Library Technology Services (co-chair)
- June Rutkowski, Information and Technical Services (co-chair)
- Amy Armitage, Information and Technical Services
- Corinna Baksik, Library Technology Services
- Robert Heintz, Widener Library
- Lee Sullivan, Schlesinger Library
- Carol Tierney, Widener Library
- Robin Wendler, Library Technology Services

Reclamation Project Milestones

1. **Alignment of Connexion authorizations.** To comply with university security best practices, shared OCLC logins will no longer be used by Harvard staff. Units will be surveyed for a list of active Connexion users for individual account creation mapped to target OCLC Symbols. This work will be coordinated by the OCLC Coordination Working Group.

2. **Cataloging staff switch to using new Connexion logins.** After the new logins have been distributed to units, cataloging will begin under the new target symbols. It will not be possible to catalog under prior, now defunct symbols.

3. **Reclamation.** All cataloged holdings for the group of Alma libraries associated with an OCLC Symbol will be exported from Alma and ingested into OCLC WorldCat via the OCLC Data Sync Tool. Cleanup reports will be distributed to stakeholders. Harvard Library holdings for titles added since going live with Alma and all future holdings will be represented in WorldCat.

4. **ILL processing freeze.** This change will also require a temporary processing freeze for any symbol that will no longer be retained. Timing for this step will vary for each symbol.

5. **Deletion of old symbols/records.** After all ILL requests on the old symbols have been returned to Harvard, records under the old symbols will be deleted in OCLC as an accurate reflection of Harvard holdings. For symbols that are not changing, records that were not updated as part of the data sync process will be deleted, again, reflecting actual Harvard holdings.

6. **Bibliographic Notification Service.** After old records are deleted, the Bibliographic Notification Service (OCLC’s metadata enrichment service) will be reactivated for the symbol.

Post-Reclamation Project Milestones
1. **Creation of shared retention statements & OCLC Local Holdings Records.** *(TBD, will follow after all symbols are set via Data Sync)*

**Child pages**

- Alma to OCLC Symbol Mapping
- Data Sync FAQ
- Data Sync Project Outline
- OCLC's LHR service (Local Holdings Records) - Alma export and data mapping
- LHR Data Sync implementation timeline
- OCLC Reclamation (2020-21) documentation archive
  - OCLC Project - Connexion authorizations and reclamation planning timeline
  - OCLC Reclamation - collection analysis, clean-up and enhancement
  - Cataloging policies and practices for Data Sync
  - Alma publishing for Bibliographic Data Sync Reclamation
  - OCLC Bibliographic Data Sync processing - collection configuration, test files and report output