CARLI Electronic Resources Management Committee (ERMC) Meeting

Date/Location: Thursday, October 26, 2023, zoom

Members attending: Heather Cannon, Robin Hofstetter, Elizabeth Hollendonner,

Jennifer Patterson, Megan Ruenz, Lisa Wallis

Members absent: Andrea Imre, Elizabeth Nelson, Sara Rizzo

CARLI Staff attending: Denise Green, Nicole Ream-Sotomayor, Marisa Tolbert

Guests:

**Decisions:**

* September minutes approved.
* December meeting was rescheduled for Friday, December 15 at 10 am.
	+ CARLI staff that have been in discussion about OCLC Data Sync and OCLC products (Annie, Ted, Adrienne, and Jen) will be invited to do a Q & A session with ERMC during the December meeting.
* Millikin and Northeastern Illinois signed up to be case studies for OCLC Data Sync.
* Continuing Worldshare discussion at the November meeting.

**Announcements:**

* CARLI Annual Meeting and registration announced: <https://www.carli.illinois.edu/carli-annual-meeting-4>
* Selection System is still open. It is closing on 11/10/23. If you have any questions, send a ticket to support.

**Discussion:**

OCLC Collection Manager Update (Denise)

CARLI staff have compiled committee member questions and our own. Sharing draft document of conceptual map with Alma IZ/NZ/CZ KB, OCLC Data Syncs, Active OCLC KB Collections in Collection Manager, and OCLC WorldCat.

* One-way relationships.
	+ Set up with OCLC Knowledge Base (KB) to Alma. Importing of bib records into Alma IZ.
	+ Same relationship with WorldCat.
* Two-way relationships.
	+ Between WorldCat and Collection Manager where Interlibrary Loan (ILL) comes in.
* No direct communication.
	+ Going out to OCLC, unless a Data Sync has been set up. CARLI has set these up, some of you have set up an additional/secondary one. Data Syncs are weekly for e-resources. OCLC Documentation states this is monthly.
	+ Components set up in Alma and Worldshare for Data Sync.

What’s the difference between Worldshare and WorldCat? (Liz)

OCLC Worldshare/ILL module gets information from Collection Manager and WorldCat. No sync between Worldshare and Alma. Each active electronic collection in Collection Manager has lending level options—must be set here.

* Roosevelt had a ticket with OCLC where they deactivated ILL for an item that Roosevelt kept getting an error message for when attempting to shut off borrowing requests.
* Things showing up in WorldCat as requests, but not in Primo VE. Getting requests that cannot be filled. Got a Collection Manager account, poking at documentation, a lot of information, and finding options are grayed out that could potentially eliminate requests for things that cannot be lent. Haven’t reviewed Alma section of documentation. (Liz)
* Asking OCLC about your permissions can help. (Lisa)
* Connexion on the Web is going away which prompted investigating WorldShare. All collections active in Collection Manager were turned off because of requests for things that cannot be lent. (Liz)

Alexander Street Press (ASP) records/Records without OCLC #s

* ASP titles individually input into OCLC? Sync may not remove because not in Alma (during Voyager) and old enough records they may not have OCLC #s. (Heather and Denise)
* Go into record manager and look at holdings going title by title. (Lisa and Heather)
* Deleted all holdings in Collection Manager, everything electronic removed from system. Doesn’t mean that things without OCLC# were removed. (Megan)

Can we make a set of things without OCLC#? (Liz)

* These go into staging area – this is how Data Sync treats records with no OCLC #. Who has time to review these? How do you get to this in OCLC? (Denise)
	+ Staging area mentioned in Data Sync documentation – replace OCLC record or to let it go to “staging” area. “Under review” if it met criteria, it would replace OCLC record.
	+ Who knew there was an *E-Resources Purgatory*? (Heather)
	+ For ASP this may be what’s going on. WorldShare does not know your library’s coverage without a local holdings record (LHR), it just knows that you “own” a serial. In theory, LHRs can be added for e-resources and no one in CARLI knows how to do this (small scale problem).

Alma and Data Sync record (Denise and Robin)

* With permission, Denise pulled up Roosevelt University’s Alma production on screen.

How often does the OCLC Data Sync job run and how often does it update WorldCat? (Megan)

In Alma > Resources > Publishing Profiles > Publish bibliographic record to (Data Sync) to OCLC

* + Happening daily for physical items. To look at reports, select from (…).
	+ Looked at Publishing Profile Details for “Publish electronic holdings.”
	+ The OCLC Data Sync “staging area” items might be the “skipped records” on the reports.
	+ We do not know how often WorldCat is getting updated from Data Sync.
	+ OCLC retrieves automated information from FTP daily--when there is something updated. (Lisa)
	+ You can do a full sync/re-sync. OCLC may charge fees for this. When working for SWAN consortium, OCLC offered the sync, and we took it. (Robin)
	+ There is a charge for “reclamations.” (Denise)

OCLC Documentation shared in chat (Liz):

How do I synchronize holdings between Alma and WorldCat?

<https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Troubleshooting/How_do_I_synchronize_holdings_between_Alma_and_WorldCat>

1. Configure institution settings for local holdings records collections

<https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/Create_an_ongoing_data_sync_collection/Local_holdings_records_collection/0Configure_institution_settings_for_local_holdings_records_collections>

2. Create a local holdings records collection

<https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/Create_an_ongoing_data_sync_collection/Local_holdings_records_collection/10Create_a_local_holdings_records_collection>

RE: EMAILED REPORTS: If you enable reports in Institution Settings > Reports, reports will be available via email around the time when files of records have been output and/or after there are changes to your holdings in WorldCat. When your first report is available, you will get an email from Usage\_Statistics@oclc.org with the subject field: "The report [name of report] you requested for [YYYYMMDD]."

**Tasks assigned:**

* Marisa Tolbert did meeting minutes.
* Elizabeth Nelson scheduled to take minutes for Monday, November 27, 2023 meeting.
* Andrea Imre re-assigned minutes taking for meeting on Thursday, May 23, 2024.
* Denise will research if there is a way to see details about items in the Publishing Profile Reports in Alma.
* Marisa will check with CARLI colleagues on joining the December ERMC meeting to have the OCLC Q & A.
* Marisa will re-send meeting invite series to Jennifer.

**Adjourned:** 11:32 am

**Meeting Dates and Deadlines:**

* Next Meeting (rescheduled for): Monday, November 27, 2023 at 10 am