Conceptual map:

Alma IZ/NZ/CZ KB

OCLC Data Syncs

Active OCLC KB Collections in Collection mgnr (CM)

OCLC WorldCat

Note one-way relationships:

* OCLC WorldCat can “send” bib records to Alma via an import.
* OCLC Collection Manager can “send” bib records to Alma (if set up to do so.)
* OCLC Data Syncs send changes in bib records & their holdings to WorldCat from Alma.

Note two-way relationships:

* Records can go to OCLC WorldCat from Collection Manager and vice versa.
* Record changes go from Alma to OCLC Data Syncs, and a report on how processed goes back to Alma from WorldCat via the OCLC Data Syncs.

**Where does the ILL part fit in? OCLC WorldShare**

Conceptual map

OCLC Data Syncs

Alma IZ/NZ

with WorldShare ILL:

OCLC WorldShare/ILL

Active OCLC KB Collections in Collection mgnr (CM)

OCLC WorldCat

Data Sync sets holdings y/n to institution symbol for library and that ownership determines where OCLC ILL requests sent.

* + - **Note: no direct pathway for information from Alma IZ to WorldShare ILL.**

Changing an e-collection or single title in Alma IZ has no direct effect on OCLC WorldShare ILL. Communicated indirectly if processed correctly by OCLC Data Sync.

CARLI I-Share OCLC Data Syncs are set up to run daily for physical materials and weekly for electronic resources.

Other points of confusion OCLC Collection Manager and I-Share Alma.

* + In each active OCLC Collection Manager KB Collection are settings for making eligible for WorldShare/ILL
    - This is where library staff must set “eligible” or not depending on
      * types of e-resources, for ex. Streaming videos (which by their nature cannot be “loaned”)
    - Same setting “eligible” or not for E-collections with licenses restricting or forbidding ILL.
    - What about e-resources bibliographic records with no OCLC#s? Are they processed at all by data syncs? Yes-what happens depends on data sync settings: matching options, if unmatched- go to staging area until library takes action.
* Assuming OCLC WorldCat & Share knows date coverage ranges when actually has only the library symbol attached as owning the resource. (Not filtering ILL requests by dates of coverage, just a yes/no library XXX owns it.)
  + - * Could electronic date coverages be added via a Local Holdings Record (LHR) like process? Usually for physical holdings, could do for journal e-titles (not in e-collections), if create holdings record in OCLC WorldCat?
      * Requires a script to put portfolio coverage data into OCLC holdings records most likely since Alma portfolios are not MARC records.

Possible Outcomes of CARLI staff discussions and work with ERMC:

1. CARLI Documentation Web pages. Either standalone or as supplement/section of documentation on OCLC data syncs.
2. APVE Office Hours segment(s) or other presentation
3. OCLC Collection Manager training for I-Share libraries from CARLI staff. Via a CARLI Q & A or other training techniques.
   1. Define each OCLC product and their relationships to each other.
   2. Define each OCLC product’s relationships with Alma/Primo VE.
   3. What OCLC training materials can CARLI & this committee recommend?
   4. When is it better to use OCLC Collection Manager versus other options? (For ex. If there’s no Alma CZ e-collection available.)
   5. Ted working on CARLI specific recs for Collection Mgnr
4. Collaborations between ERMC and APVE and/or Resource Sharing and/or Technical Services committees?

OCLC Documentation

1. 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>

1. 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>