

Alma Electronic Resources Management and OCLC

Audience: This page introduces OCLC products to **CARLI Alma I-Share electronic resource library** workers. Usually electronic resources library staff are alerted to problems with their Institution Zones (IZ) communicating with OCLC products due to ILL requests for materials the library either cannot lend or no longer has access to.

Definitions

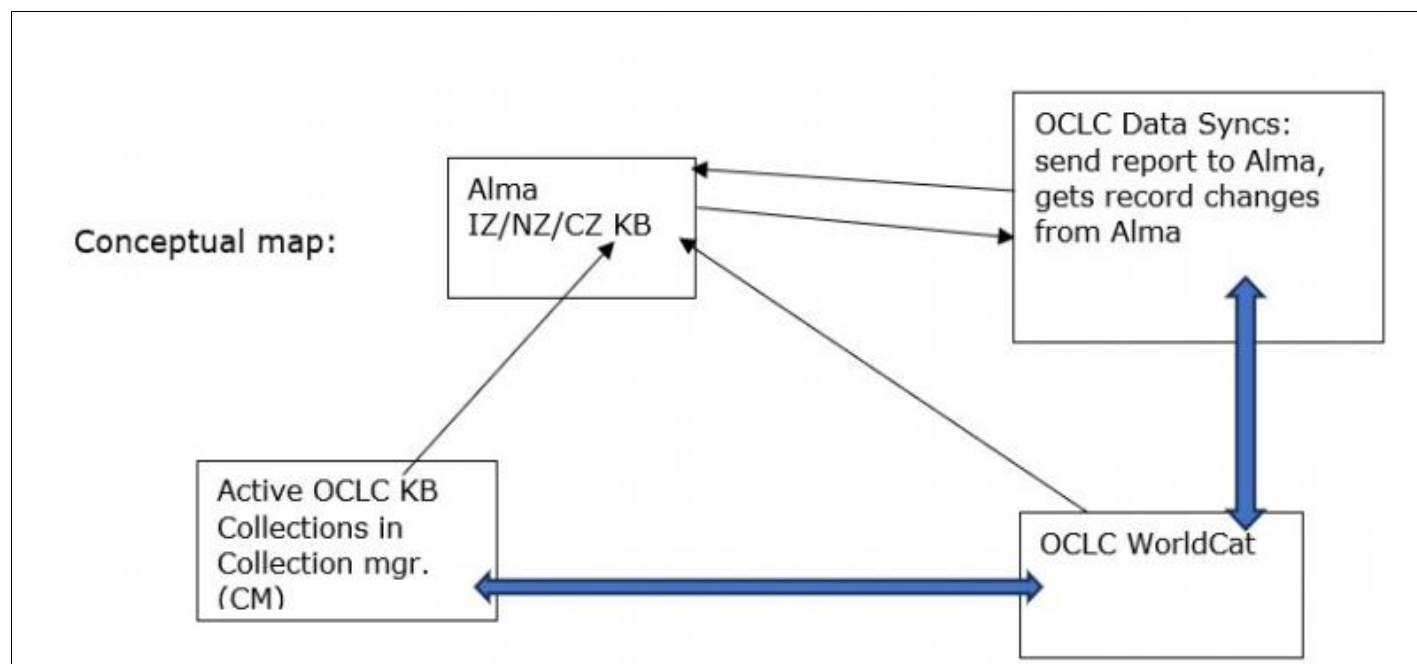
What are the various OCLC products related to Alma Electronic Resources management?

1. **WorldCat-** An online database of records cooperatively built from the bibliographic and ownership information of OCLC contributing libraries. WorldCat consists of three major components: [a bibliographic catalog \(https://search.worldcat.org/\)](https://search.worldcat.org/) that includes everything available to library users, a collection manager/knowledge base (KB) that connects library users to electronic content, and [a registry of library profiles \(https://help.oclc.org/WorldCat/WorldCat_registry/About_the_WorldCat_registry/About_the_WorldCat_registry\)](https://help.oclc.org/WorldCat/WorldCat_registry/About_the_WorldCat_registry/About_the_WorldCat_registry) that allows libraries to maintain information about their services.
2. **Collection Manager-** (https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager) OCLC cataloging tool that helps libraries streamline and automate the management of bibliographic records for their electronic and print collections in one place, while improving collection discovery and access.
3. **WorldShare (ILL)** (https://help.oclc.org/Resource_Sharing/WorldShare_Interlibrary_Loan) - Service that enables OCLC libraries to borrow and lend materials quickly and securely. It facilitates creating, sending, managing, and tracking loan requests and document orders.
4. **OCLC Data Syncs** (https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections) - An automated service that allows synchronization of local holdings with WorldCat to make collections visible and available through OCLC services. The service adds original records to WorldCat, enhances and matches local library records with existing WorldCat records, manages local holdings data, sets or deletes holdings, and updates local bibliographic data.

Definitions from [OCLC Glossary. \(https://help.oclc.org/Librarian_Toolbox/OCLC_glossaries/OCLC_glossary\)](https://help.oclc.org/Librarian_Toolbox/OCLC_glossaries/OCLC_glossary)

Inter-relationships and Conceptual Map

How do the various OCLC products communicate and relate to CARLI I-Share Alma?



Note one-way relationships:

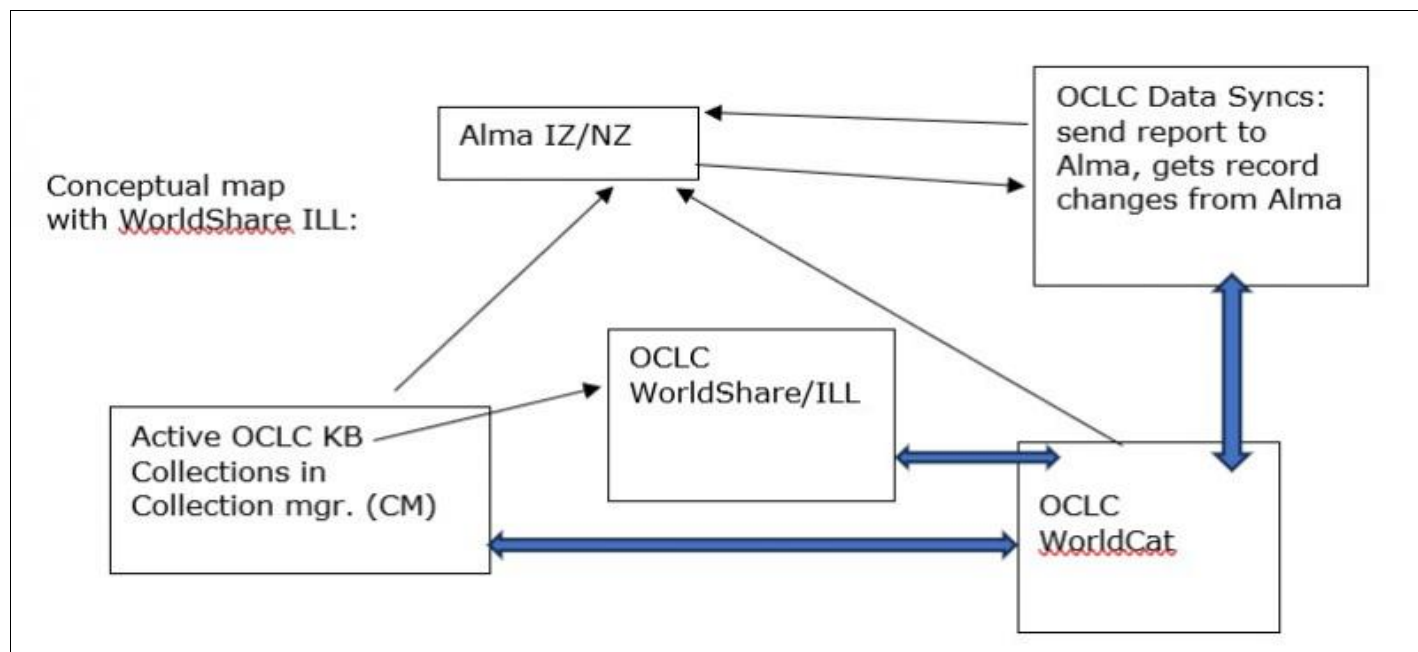
- OCLC WorldCat can send bib records to Alma via an import.
- OCLC Collection Manager can send bib records & portfolios/holdings to Alma (if set up to do so.)
- Alma sends changes in bib records & their holdings to WorldCat from Alma via OCLC Data Syncs

- Report on how changes are processed goes from OCLC WorldCat to Alma via the OCLC Data Syncs.

Note two-way relationships:

- Records can go to OCLC WorldCat from Collection Manager and vice versa.

Where does the ILL (InterLibrary Loan) part fit in? - OCLC WorldShare



Note: no direct pathway for information from your 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.

How to check OCLC Data Sync reports in your Alma IZ?

{Text and images to be done for this section.}

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

In each active OCLC Collection Manager KB Collection there are settings for making eligible/ineligible for WorldShare/ILL

This is where library staff must set a collection eligible/ineligible for ILL or not depending on

- types of e-resources, for ex. Streaming videos or audio (which by their nature are not loanable.)
- licenses allowing or restricting ILL in part or entirely.

Does OCLC WorldCat and WorldShare ILL know what date range a library has access to for electronic titles? No, WorldCat has a library's holding symbol attached to an e-title. There's no information about what years or volumes a library can access unless the library has set up OCLC local holdings data.

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 and matching options. If a record is unmatched it will go to the OCLC staging area until the library takes action or time expires. Check the Alma data sync reports regularly.

More Questions:

- Does changing a bibliographic record or portfolio or physical holdings record in an Alma IZ change OCLC WorldCat automatically via a data sync?

- Yes, with some caveats:
 - the record may not match by OCLC #s or other factors. Check for staging area records from the Alma OCLC Data Sync reports regularly.
 - some changes never recorded via data syncs.
- Why do OCLC Data Syncs?
 - A core value of librarianship is sharing resources. We are committed to sharing with other libraries what physical and e-resources our libraries own and subscribe to.

More Information at OCLC Documentation

[Create a Local Holdings Records Collection \(https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/0Create_a_local_holdings_records_collection/10Create_a_local_holdings_records_collection\)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/0Create_a_local_holdings_records_collection/10Create_a_local_holdings_records_collection)

[How do I synchronize holdings between Alma and WorldCat? \(https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Troubleshooting/How_do_I_synchronize_holdings_between_Alma_and_WorldCat\)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Troubleshooting/How_do_I_synchronize_holdings_between_Alma_and_WorldCat)

[Information on Data Sync reports on bibliographic changes and WorldCat holdings. \(https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Understand_reports/MyFiles/My_Files_reports_for_Bibliographic_or_Delete_WorldCat_Holdings_collections\)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Understand_reports/MyFiles/My_Files_reports_for_Bibliographic_or_Delete_WorldCat_Holdings_collections)

[What are configure institution settings for local holdings records collections? \(https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/0Create_an_ongoing_data_sync_collection/Local_holdings_records_collection/0Configure_institution_settings_for_local_holdings_records_collections\)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/0Create_an_ongoing_data_sync_collection/Local_holdings_records_collection/0Configure_institution_settings_for_local_holdings_records_collections)