

Alma Electronic Resources Management and OCLC

Documentation wide page *Alma Electronic Resources Management and OCLC* has been updated.

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 WorldShare (ILL) requests for materials the library either cannot lend or no longer has access to.

Definitions

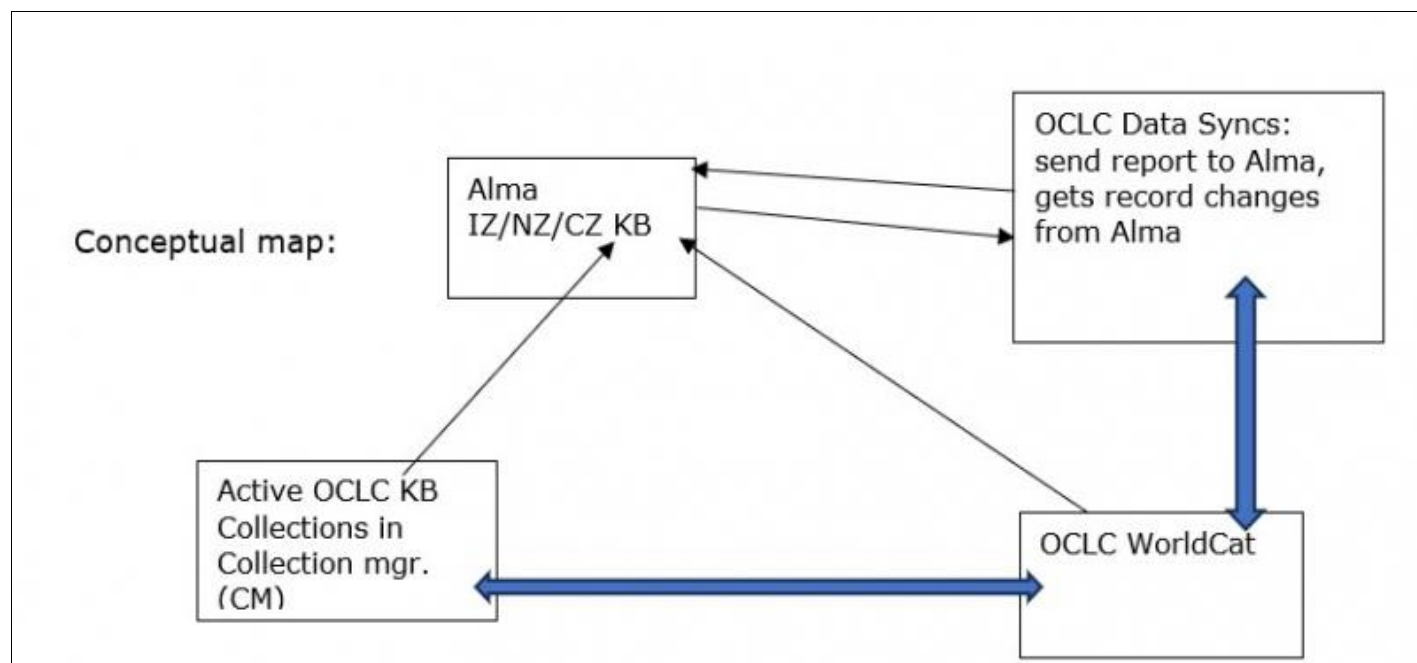
What are the various OCLC products related to Alma Electronic Resources management?

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. **WorldShare Collection Manager**- (https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager) OCLC cataloging tool, collections controller and knowledge base (KB) 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 in Collection Manager 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, creates or deletes holdings, and also updates local bibliographic data.

Definitions based on entries in [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?



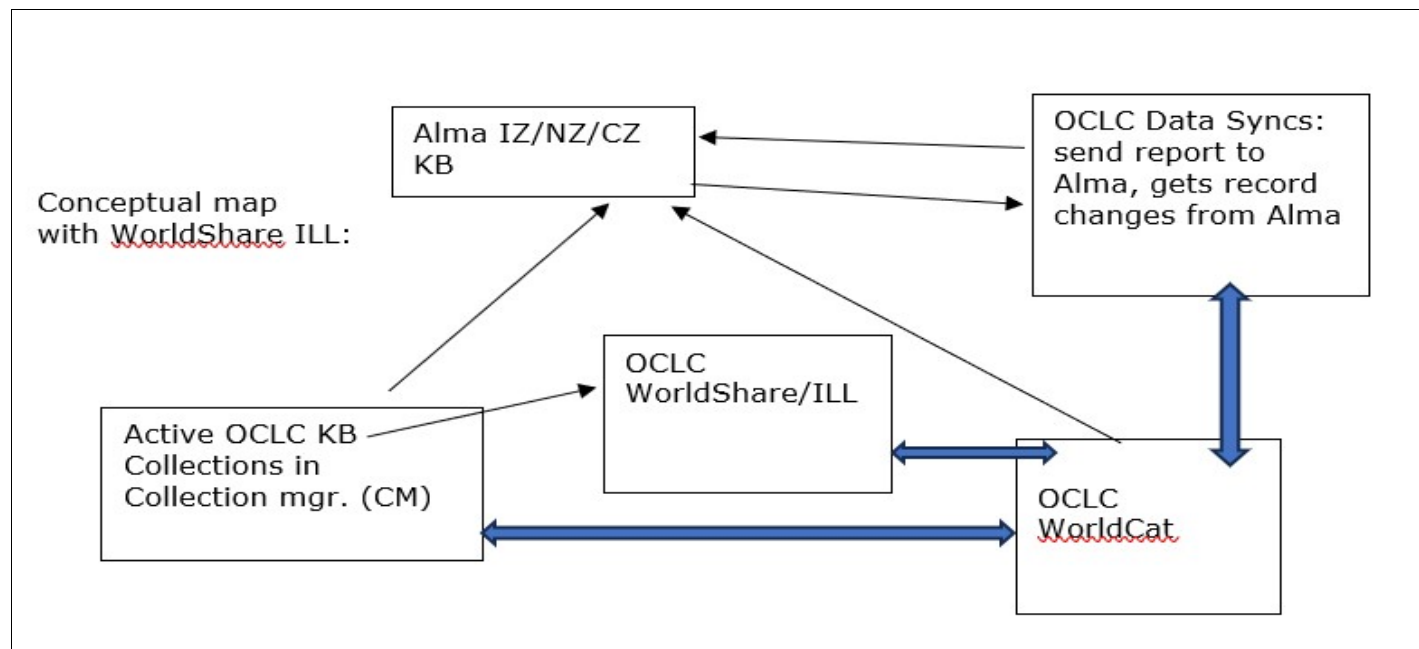
Note one-way relationships:

- OCLC WorldCat can send bib records to Alma via an import.
- WorldShare 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: WorldShare ILL does not communicate with your Alma IZ. WorldShare ILL uses WorldCat holdings details only to determine if you library may receive an ILL request.

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

Why do OCLC Data Syncs?

A core value of librarianship is sharing resources and communicating what physical and electronic resources your library collects.

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

Go to "Admin" then "Monitor Jobs" - History. Search for "Publishing Platform Job Publish electronic holdings to OCLC".

Monitor Jobs Cancel

Scheduled Running **History**

1 - 2 of 2 Name Publishing Platform Job Pul Refresh

Job Category: All Status: All Submit Date Range: 03/01/2024 - 03/15/2024

Name	Process ID	Records processed	Records with exceptions	Job Category	Operator	Submit Date	Start Date	End Date	Status
1 Publishing Platform Job Publish electronic holdings to OCLC	2578029...	7	0	Publishi...	System	03/09/2024 06:00:05 CST	03/09/2024 06:00:05 CST	03/09/2024 06:00:57 CST	Completed Successfully
2 Publishing Platform Job Publish electronic holdings to OCLC	2570283...	9	0	Publishi...	System	03/02/2024 06:00:06 CST	03/02/2024 06:02:04 CST	03/02/2024 06:03:35 CST	Completed Successfully

Click on the "More Actions" or "..." menu and click on "Report". You'll then a report similar to:

Job Report

Counters

New Records	0
Updated Records	2
Deleted Records	1
Unpublished failed records	0
Skipped records (update date changed but no data change)	11
Filtered records (not published due to filter)	0
Total records written to file	0

You can also see reports from the job "Publishing Platform Job Publish electronic holdings to OCLC" by going to "Admin" then "Monitor Jobs" - Scheduled tab.

Monitor Jobs

Scheduled Running History

1 - 4 of 4

Job Category : Publishing Active : All

	Active	Name	Job Category
1	<input checked="" type="checkbox"/>	Publishing to OCLC - Bibliographic Records	Publishing
2	<input checked="" type="checkbox"/>	Publishing to Google Scholar	Publishing
3	<input checked="" type="checkbox"/>	Publishing Platform Job Publish electronic holdings to OCLC	Publishing

How to check Data Sync reports in OCLC and more details at [CARLI on Data Syncs/Automatic Holdings Updates](https://www.carli.illinois.edu/products-services/i-share/physical-res-man/oclc-data-sync)
(<https://www.carli.illinois.edu/products-services/i-share/physical-res-man/oclc-data-sync>)

For CARLI I-Share libraries what is sent to e-resource data syncs from the Alma IZ?

Most I-Share libraries have one of two definitions for the e-resources set sent to WorldCat. See the e-resources general publishing profile for the exact definition of the set.

For example: or second (under construction, will add more information)

What about e-resources bibliographic records with no OCLC number match? Are they processed at all by data syncs?

What processing happens depends on data sync settings and defined matching options. If a record is unmatched it will go to the OCLC staging area until the library takes action (or staging period expires.) Check the Alma data sync reports regularly to know when to check the OCLC staging area.

Can we set the ILL availability for WorldShare ILL in Collection Manager?

Yes, CARLI recommends this practice. In each active WorldShare Collection Manager KB Collection there are settings for making eligible/ineligible for WorldShare/ILL:

Library staff must set a collection eligible for ILL or not eligible depending on

- types of e-resources, for ex. Streaming videos or audio files (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 just the 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

More Information at OCLC Documentation

[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) (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)

[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? \(https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/Create_an_ongoing_data_sync_collection/Local_holdings_records_collection/0Configure_institution_settings_for_local_holdings_records_collections\)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Data_sync_collections/Create_an_ongoing_data_sync_collection/Local_holdings_records_collection/0Configure_institution_settings_for_local_holdings_records_collections)

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