Post-Reclamation Tasks

Accept the Scan/Delete File

What is it?

As part of the reclamation, you sent a file representing all bibliographic records that should have holdings set in OCLC. If holdings were currently set in OCLC on records that were not in the file you sent, those records are listed in the scan/delete file.

The scan/delete file lists the OCLC Control Number (OCN) and a portion of the title for the WorldCat records from which your holdings will be deleted.

What if I accept it?

OCLC will remove your library's holdings for those records.

What if I reject it?

OCLC will not remove your library's holdings for those records. If these records, or some portion of them, are titles you no longer have in your collection, you will need to remove OCLC holdings yourself later.

Where do I find it?

OCLC will upload the scan/delete report to a **Google folder**. Match your library's OCLC Symbol to the filename of the report and download it.

How can I check what I'm seeing on the report?

One test is to take the number of your current WorldCat bibs and subtract the number of records you sent to OCLC for the reclamation (columns G & H in the spreadsheet). The difference should be the number of scan/delete records. If the number is not listed in the spreadsheet, the library can check holdings in Connexion.

To check your current holdings in WorldCat, in your library's Connexion account or WorldShare Collection Manager you can use the "**li: XXX**" search, where "XXX" is your OCLC symbol.

Caveats:

The number of scan/delete records may *not* be the same as the result above, for a number of reasons.

- *Unresolved records*: Even though your library's holdings are set on records that are added to WorldCat staging (i.e. unresolved), those holdings are not "indexed" in the "li: XXX" search. So these records will not be in neither the scan/delete file nor your current WorldCat holdings.
- *Electronic resources*: Your library may have WorldCat holdings set for electronic resource records which were not included with your Reclamation file. If your library uses the WorldCat Knowledge Base (KB) to maintain WorldCat holdings for your electronic resources, OCLC will re-set your KB holdings prior to processing the scan/delete. These e-resource records will not be included in the scan/delete report, even though you didn't send them in your initial file.
  If you have holdings for e-resources in WorldCat that you do *not* maintain via the WorldCat KB, please reach out to OCLC for further instructions.
- *Incomplete Reclamation File*: If the file you sent for the reclamation did not include all of the records that should have holdings set in WorldCat, you should not accept the scan/delete file. Rather, you should send a new, complete Reclamation file so that we can ensure that all your WorldCat holdings will be current. Please work with Jessica to determine the best date to send your complete file.

If you have further questions about whether you should accept the scan/delete file, please contact Carrie Morrison at OCLC.

Download Reclamation Reports

Instructions to download or FTP:

- FTP files from OCLC server:
- SFTP directory to FTP files from OCLC: /xfer/metacoll/reports
- If using FileZilla: host: sftp://filex-m1.oclc.org port 22
  - Username= fx_cccl
  - Enter your institution's assigned password: PW= aH4SlJ-c [lower case "L" after "S"]
OR

- Download from WorldShare:
- https://ccctechcenter.share.worldcat.org/wms
    - Login: jhartwigsen / eXLnE7w0rK!
    - Go To: Metadata > My Files > Downloads > click on Download button
    - Download files that match your library's filename

The files after reclamation: What is in these files

CollectionID Filename.unresxrefrpt.txt (Unresolved Cross Reference)

What is it? This is a list of records that OCLC could not match to WorldCat Records. These records are considered *unresolved*. OCLC has assigned each unresolved record a provisional OCN and added it to WorldCat Staging.

Do I need to review it? Yes

What do I do with it? You may want to resolve these records by finding a match in WorldCat, creating a record in WorldCat via original cataloging, or, if the record doesn't belong in WorldCat, removing them from Staging.

OCLC has instructions for this process using Connexion and WorldCat Collection Manager.

- Each library has some unresolved records (records that don't match and can't be added to WorldCat as new records). These records have been given a provisional OCLC number (OCN) and added to WorldCat Staging.
- Each library should log in to Connexion, using their library's login information, to validate if the records are correct and replace the record in Connexion. The records in WorldCat will have their institution (library) symbol in field 040 subfield $a and subfield $c. More information is available from OCLC.

CollectionID Filename.bibdetailexcpt.mrc.txt

What is it? This file gives more information about the unresolved records.

Do I need to review it? Yes

What do I do with it? Have it open while you are reviewing your records in WorldCat Staging, since it may be useful in determining why the record was not matched.

This report displays record identifiers of bibliographic records that OCLC was unable to match to records in WorldCat.

CollectionID Filename.xrefrpt.txt

What is it? This is a list of MMS IDs for the files that you included together with the matching OCLC number. Any records you submitted that weren't matched are not included.

Do I need to review it? Maybe

What do I do with it? You can import this file to Alma to update your current records. If you import this file, the IZ records will remain as they are currently, but any records that previously did not have OCLC numbers will have them added.

The file contains a list of MMS ID's from the IZ and the OCN from OCLC. This file can be used to import into the IZ to update the records in Alma and add the missing OCN. If you use this file to update the records in Alma, it will need to be converted to a .mrc file in MarcEdit.

CollectionID Filename.MyLibraryRecords.1.mrc file

What is it? This is a file of current WorldCat MARC records that match the records you submitted. Any records you submitted that weren't matched are not included.

Do I need to review it? Yes

What do I do with it? Use this file for the Instructions below to update the Alma IZ records. If the OCN is missing, it will be added to the bib record in the IZ. The records in Alma will be replaced with the current WorldCat record. Local fields will not be overlayed or removed.

Import Records with OCNs to Alma IZ

Download the Collection_ID.MyLibraryRecords.1.mrc from the OCLC server if you haven't already downloaded the file.

The .mrc file will need to be downloaded from OCLC. Look up the library's filename in the Reclamation spreadsheet, under column N. **It is important to download the correctly named file, multiple libraries have the same Collection IDs but different datasync filenames.** The filename is based on the date the file submitted the file to OCLC.

Download .mrc file from OCLC:

FTP files from OCLC server:
1. SFTP directory to FTP files from OCLC: /xfer/metacoll/reports
2. If using FileZilla: host: sftp://filex-m1.oclc.org port 22
    a. Username= fx_cccl

b. Enter your institution's assigned password: PW= aH4SlJ-c [lower case "L" after "S"]

OR

Download from WorldShare:
1. https://ccctechcenter.share.worldcat.org/wms
   a. Login: jhartwigsen / eXLnE7w0rK!
   b. Go To: Metadata > My Files > Downloads > click on Download button
   c. Download files that match your library's filename

 What are these files?:

CollectionID Filename.MyLibraryRecords.1.mrc file

What is it? This is a file of current WorldCat MARC records that match the records you submitted. Any records you submitted that weren't matched are not included.

Do I need to review it? Yes

What do I do with it? Use this file to import records back into Alma. This will add the missing 035$a if the OCN was previously missing from the IZ bib record or if the OCN needs updating. If you have not previously imported records from OCLC, an Import Profile will need to be created to import the records from the OCLC .mrc file.
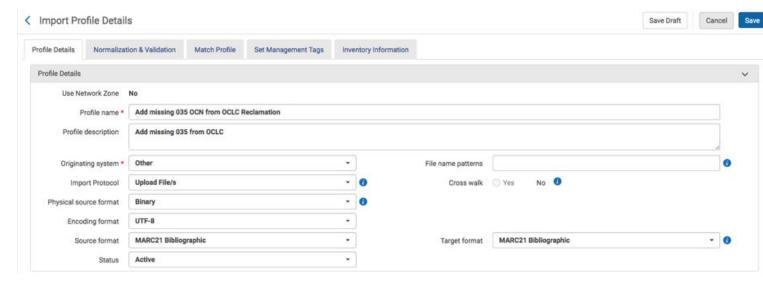
Import Profile needed for importing .mrc file into IZ:

Documentation about Import Profiles
1. Go to Resources > Manage Import Profiles
2. Add a New Profile
3. Choose Repository and click next
4. **Uncheck** "Use Network Zone" (important or the profile won't work)
5. Name the profile
6. Add a description
7. Choose Originating System = Other
8. Import Protocol = Upload File/s
9. Physical Source Format = Binary
10. Encoding Format = UTF-8
11. Target Format = MARC21 Bibliographic
12. Source Format = MARC21 Bibliographic
13. Status = Active

14. Next
15. Click Next again

16. Match Profile
    a. Match by Serial / Non-Serial = Yes
    b. Serial = 001 to MMS_ID Match Method
    c. Non-Serial = 001 to MMS_ID Match Method
17. Match Actions
    a. Handling Method = Automatic
    b. Upon Match = Merge
    c. Merge Method = Overlay all fields but local
    d. Check = Do not override / merge a record with lower brief version
    e. Choose Skip Record = Community Zone Linked Records

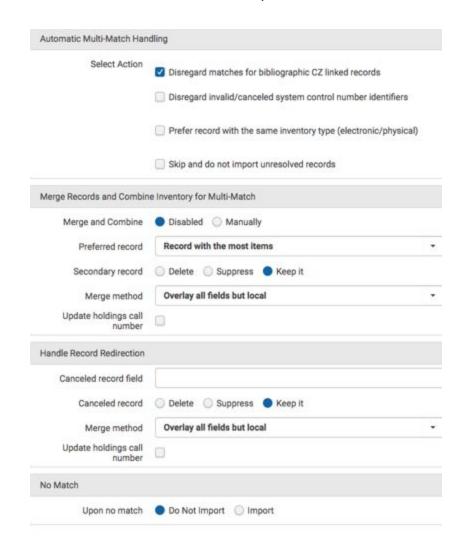**Profile Details** | **Normalization & Validation** | **Match Profile** | **Set Management Tags** | **Inventory Inf**

Match Profile

Match by Serial / Non Serial: ● Yes ○ No ⓘ

Serial match method: **001 To MMS_ID Match Method** ▾ ⓘ

Non Serial match method: **001 To MMS_ID Match Method** ▾

Match Actions

Handling method: ● Automatic ○ Manual ⓘ

Upon match: ● Merge ○ Overlay ○ Do Not Import ○ Import New Record ⓘ

Single match - match only record with the same inventory type (electronic/physical): ☐

MERGE/OVERLAY

Merge method: **Overlay all fields but local** ▾

Select Action:
☐ Allow bibliographic record deletion
☑ Do not override/merge a record with lower brief version

☐ Do not override Originating System

Community Zone linked records handling: **Skip record**

Do not override/merge record with an older version: ● Disabled ○ Consider Originating System ○ Ignore Originating System

f. Check Disable =Do not override/merge record with an older version

18. Automatic Multi-Match Handling
    a. Select Disregard Matches for CZ linked bib records
19. Merge Records and Combine Inventory
    a. Merge and Combine = disabled
    b. Preferred Record = Record with the most items
    c. Secondary Record = Keep it

  d. Merge Method = Overlay all fields but local

20. Handle Record Redirection = Overlay all fields but local

Automatic Multi-Match Handling

Select Action
- ☑ Disregard matches for bibliographic CZ linked records
- ☐ Disregard invalid/canceled system control number identifiers
- ☐ Prefer record with the same inventory type (electronic/physical)
- ☐ Skip and do not import unresolved records

Merge Records and Combine Inventory for Multi-Match

Merge and Combine ● Disabled ○ Manually

Preferred record **Record with the most items** ▾

Secondary record ○ Delete ○ Suppress ● Keep it

Merge method **Overlay all fields but local** ▾

Update holdings call number ☐

Handle Record Redirection

Canceled record field [ ]

Canceled record ○ Delete ○ Suppress ● Keep it

Merge method **Overlay all fields but local** ▾

Update holdings call number ☐

No Match

Upon no match ● Do Not Import ○ Import

21. No Match = Do Not Import

22. Next
23. Click Next again
24. Save
25. Locate Import Profile
26. Click on Run under more options (...)
27. Select File
28. Locate saved .mrc file from OCLC
29. Click Add

30. Click Submit
31. Click on Refresh until job has finished
32. Look at reports after import completed
    a. Fix any records that may need manual handling
33. Link a set of records to the NZ

Link a set of records to the NZ

Now that the records previously missing OCNs have been updated, the IZ records can be linked to the NZ.

Detailed information from Ex Libris' Alma documentation: <u>Link a set of records to NZ</u>

To Create a set of records and run a job to link IZ records to NZ:

1. Repository Search from Alma Drop-down menu: Find Physical Titles > Click on Advanced Search > Add Condition > Under All titles choose **Is Linked** > equals **NO** > ADD Condition > Under All Titles Other System # > **starts with OCLC**
2. Save the query. This query will be saved in the Managed Sets (located under Admin)
3. Go to Admin > Run a Job
4. Locate in Job Description: Link a set of records to the Network Zone
5. Next
6. Locate saved Managed Set
7. Next
8. Choose Unique OCLC Identifier Match Method for both <u>Serial and non-Serial Match Method</u>
9. Click Next
10. If the information looks correct, click Submit.
11. Confirm
12. Click Refresh until the job is finished.
13. After the job is finished, check the report.
    a. Do any cleanup that is needed from the reports.
14. Set up Ongoing Publishing to OCLC

Ongoing Publishing to OCLC

Alma can automatically handle adding holdings for new titles and removing holdings from withdrawn titles. To set this up, you need to establish a per-institution OCLC Data Sync collection. You should do this after you have completed the reclamation.

The LSP Cataloging Work Group has instructions for setting this up in their **Publishing to OCLC** best practices document. Note that multi-college institutions will have a special setup not detailed in that document.

Please contact Carrie Morrison for questions about the scan/deletes,the unresolved records, or publishing to OCLC.

Catalog Work Group Procedures updating bib records:

Catalog Work Group wiki page also has instructions for updating records in Connexion and exporting to the NZ along with some other helpful procedures.
Setting up Connexion
Overlay Bib Record
Publishing to OCLC
Deleting MARC fields in OCLC records