

OCLC DATA SYNC COLLECTIONS MATCH METHOD CHANGES

SUNY Library Shared Services
Maggie McGee



OCLC's New Match Method

On July 7, 2020, OCLC implemented a new processing method for data sync collections

- Prior to OCLC's new processing method:
 - MARC records matched on the OCN (OCLC number)
 - Data sync collection were able to omit bib records without OCNs from publishing
- OCLC's new processing match method now matches on more than just OCN. It now matches records based on:
 - OCN (035 \$a)
 - Title (245 \$a)
 - Material type (LDR 06)
 - 008 position 23 or 29
 - 856 with 2nd indicator 0
 - Non-electronic MARC records containing MARC 856 with a 2nd indicator 0 will match to an electronic MARC record
- Bib records without OCNs will now attempt to match to records in OCLC
 - The library's holdings will be places on and OCLC record if a match is found using the other OCLC match point
 - If the record does not find a match in OCLC it will not publish and go to staging

OCLC's New Match Method

- OCLC's new match method may result in MARC records being sent from Alma matching on a different record in OCLC
- Incorrect matching can impact new, updated, and deleted bib records resulting in:
 - Holdings being added to the incorrect bib records
 - Current holdings on the correct OCLC number remains
 - Adds an additional holdings to an OCLC record the library does not have in Alma
 - Sends a new bib record to the SUNY OCLC query collection
 - New records are imported to Alma and upon no match in the NZ they will create new bib record
 - Holdings being removed from the incorrect bib records
 - Holdings remain on the correct OCLC records the library sent from Alma
 - OCLC “removes” holdings on OCLC record it matched on instead
 - The deleted bib records are sent to the SUN OCLC query collection
 - OCLC delete files are not imported to Alma

Reduce OCLC Matching on the Incorrect Record

Ways to prevent OCLC's new process from matching on the incorrect bib record:

1. Do not edit MARC fields in Alma that the new process uses to match on:
 - OCN (OCLC number)
 - Title (245 \$a)
 - Material type (LDR 06)
 - 008 position 23 or 29
2. Do not use 2nd indicator 0 when adding MARC 856s to IZ only physical bib records
 - Update existing records with a 2nd indicator of 0 to blank or another indicator
3. Refine data sync collections to exclude records with 856 2nd indicator 0 to publish
 - **NOTE:** This will prevent any bib records that are being sent from Alma to OCLC with 856 2nd indicator 0 from publishing holdings in OCLC
4. Set Management Tags to “Don't publish” for all bib records without OCLC numbers
 - Brief bib records
 - Course reserves created from a brief citation
5. Re-import IZ only bib records when updating them in Alma

Identifying Records in Alma With MARC 856 2nd Ind. 0

Filter a set of physical records using the “SUNY – 856 _0” indication rule

1. Copy the SUNY – 856 _0 rule indication rule to your IZ

```
rule "856| 0"  
when  
exists "856.{*,0}"  
then  
set indication."true"  
end
```

2. Create a set of records
3. Apply filter to the set of records

Correct BIB Records in Alma With MARC 856 2nd Ind. 0

Use a normalization rule and process to correct bib records with MARC 856 2nd indicator 0. Some possible options:

- Change the 2nd indicator to a blank
 1. Copy the “SUNY - Change 856 2nd indicator” normalization rule
rule "856| 0" to your IZ
when
TRUE
then
changeSecondIndicator "856" to " " if(exists "856.{*,0}")
end
 2. Create a normalization process
 3. Run the job on the normalization process and set of identified records

- Remove MARC 856 there is a 2nd indicator 0
 1. Copy the “SUNY - Remove 856 with 2nd indicator 0” normalization rule
rule "856| 0" to your IZ
when
TRUE
then
removeField "856" if(exists "856.{*,0}")
end
 2. Create a normalization process
 3. Run the job on the normalization process and set of identified records

Identifying Bib Records in Alma Without OCLC Numbers

Perform an IZ advanced repository search to identify bib records without OCLC numbers:

Search in: **Physical titles** Zone: **Institution** Network Community

Title: Other System Number Not Contains Phrase (OCoLC)

Clear form Search

Search in: **Physical titles** Zone: **Institution** Network Community

Title: OCLC Control Number (Not Contains Phrase (OCoLC)

Clear form Search

“Don’t Publish” Bib Records Without OCLC Numbers

Set Management Tags to “Don’t publish” in the MD Editor for bib records without OCLC numbers:

1. Individual record:
 1. Open a bib record in the MD Editor
 2. Go to **Tools>Set Management Tags>Export to Worldcat>Don’t Publish**
 3. **File>Save and Release record** (Ctrl+Alt+R)

2. Using the “Set Management Tags” job:
 1. Go to **Admin>Manage Jobs and Sets>Run a Job**
 2. Search for the “**Set Management Tags**” job
 3. Click on the radio button next to “**Set Management Tags**” job
 4. Click **Next**
 5. Click on the radio button next to the set of record without OCLC numbers
 6. Click **Next**
 7. Click the check box next to “**Synchronize with OCLC**”
 8. Select “**Don’t publish**” from the drop-down
 9. Click **Next**
 10. Click **Submit**
 11. Click **Confirm**

Review Bib Data Sync Files

Review data sync files to see which records matched to a different OCLC record:

1. Login to OCLC Worldshare Management Services
 - https://www.oclc.org/apps/oclc/welcome?service=wms&inst_type=wayf
2. Click ***My Files***
3. Click ***Download***
4. Select files containing BIB in the file path:
 - Bibprocessingreport - is based on collection setup, record content, and actions taken on the bibliographic record.
 - Bibsummaryreport - contains the corresponding statistics for the Bibliographic Processing Report
 - BibCrossRefReport - includes only records that resulted in one of the following bibActions: create, match, replace, or field transfer
 - BibUnresolvedCrossRefRport - includes only records that resulted in a bibAction of unresolved
 - BibExceptionReport - contains unresolved records that were added to WorldCat staging
5. Click ***Download***
6. Open the file on your desktop
7. Review file

Review Bib Data Sync Files

OCLC BibSummaryReport example:

match | 47 | ZBM-ZBM.1031576.IN.BIB.D20200831.T060407377.1031576.zbm.3167236030004804.BIBS.mrcOCLC

BibSummaryReport Actions:

Replace	Create	Data Error
Field Transfer*	Exclude	Process Error
Match*	No Action*	Unresolved

Review Bib Data Sync Files

OCLC BibProcessingReport example:

ZBM_1031576_1598868247377::bib::73499 | 990002362520204804 | 411769 | 411769 | OCLC | match

Note: records will still say “match” if the record matches on a different OCLC number:

ZBM_1031576_1597745889543::bib::61992208 | 990004319370204804 | 461265386 | 1052793035 | match

BibProcessingReport Actions:

Create	Match*	Field Transfer*	Data Error	No Action*
Unresolved	Replace	Exclude	Process Error	Other

Additional Things to Consider With Publishing Profiles

1. Publishing profiles currently only allows full MARC records to be sent to OCLC causing records to match on more than the OCN
 - Alma requires development to be able to use “Numeric Key Search”, which allows match on the OCN
2. If changes are made to specific fields in the MARC record in Alma and they do not exist in the master OCLC, the following fields maybe added to the OCLC MARC record:
 - Call number fields: 050, 055, 060, 070, 080, 082, 083, 084, 085, 086, 090, 092,
 - Note fields: 505, 511, 520
 - Subject Headings: 6XX
 - Electronic location and access: 856
3. For libraries publishing e-resources via bib publishing profiles some holdings add to the incorrect bib record:
 - Some CZ records use the print bib record and OCN
 - Some CZ records contain the e-resource and print bib record OCNs

Additional Things to Consider With Publishing Profiles

4. Update import and integration profiles “Set Management Tags” to “Don’t publish” for e-resources if your library is not publishing e-resources to OCLC from Alma

Import Profile Details

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

Set management tags for all the records imported using this profile

<input type="checkbox"/> Suppress record/s from publish/delivery	Condition	Only for new records
<input type="checkbox"/> Suppress record/s from external search	Condition	Only for new records
<input type="checkbox"/> Synchronize with OCLC	Condition	Only for new records
<input type="checkbox"/> Synchronize with Libraries Australia	Condition	Only for new records

MANAGEMENT TAGS

Integration Profile Example

Synchronize with External Catalog? * Don't publish

AUTHORIZATION

Supporting Documentation

SUNY:

- [Normalization Rules](#)
- [SUNY's OCLC Publishing Profiles Libguide](#)

Ex Libris:

- [How to Implement a Normalization Rule](#)

OCLC:

- [WorldCat Matching release notes, August](#)
- [My Files reports for Bibliographic or Delete WorldCat Holdings collections](#)
- [Transfer of Bibliographic Data](#)