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ER&L

Hidden opportunity:

The advantages of synchronizing multiple knowledge bases

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19+ years in Technical Services:
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- 27+ years with UT Southwestern
 - Public services (9 years)
 - Collection development (12+ years)
 - Cataloging (9+ years)
- Work with vendors on licensing and acquisition of electronic resources
- Manage metadata in and serve as system administrator for library catalog (Koha), institutional repository (DSpace), and more
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Learning objectives

01

Understand the benefits to the library experience when you synchronize knowledge bases

02

Learn how different libraries are synching knowledge bases to their advantage

03

Important things to consider when implementing a knowledge base synchronization strategy

The Problems

Resource Management

- Many large-scale projects with less staff to do them.
- Extra steps grabbing data for multiple systems.
- Duplicate work: doing the work in two systems.
- Time before changes up to date in OCLC.

Resource Sharing

- ILL staff time troubleshooting inaccuracies found while filling requests.
- Or worse, being unable to fill them at all.

Big Concerns, Big Dreams

Big Concerns

"If it ain't broke, don't fix it."

Will this create a bigger mess that ultimately leads to more work and staff time?

Will this process be more or less accurate than doing the task manually?

Big Dreams

Potential for holdings to be more accurate and updated faster than before.

Work in one system, let that system do the rest for us.

Show our electronic data to the world.

Strategic Plan

Build Efficiencies and Save Time

Analyze current organizational structure and identify opportunities to transform work processes, build efficiencies, and realign human resources to focus on strategic priorities and more effective ways of working.

Expose More Resources to More Places

Advance Research, Scholarly Communications, and Publishing.

UT Southwestern "Why" & "Who"

- Became a fully-digital library in 2014 (10 years ago!)
- Print collection was either moved to remote storage or discarded
- Print holdings were assigned to the remote storage facility
- Electronic journal coverage had not been maintained with OCLC
- Declining ILL fill rate because of incorrect/incomplete coverage data

Knowledge Base: Ex Libris Alma

Three easy steps, right?

- Initial full load of records AND/OR an initial reclamation to fix all prior holdings if already manually synchronizing.
- A way of capturing which records to send (in Alma, usually a set or for OCLC, a publish to OCLC flag).
- Scheduled job that publishes that set to the vendor, including adds, updates, and deletes.

Sort of...

Two Setups: Physical & Electronic

Physical

Work with OCLC to get collection ID for WorldShare, FTP access, and record enrichment data

Built in "Publish to OCLC" job in Alma

Records have a management flag to "Publish Bib to OCLC"

Run jobs to add flag to all physical records you want to publish or remove from records you do not want to publish

Initial load of all records, then schedule to run incrementally

Electronic

Work with OCLC to get collection ID for WorldShare, FTP access, and record enrichment data

Create a logical set of all electronic titles you want to publish to OCLC

Create a Publishing Profile to publish set you made in previous step

Run job to *remove* "Publish Bib to OCLC" flag otherwise the physical job will also publish these titles and publish them as deletes

Initial load of all records, then periodically run

Obstacles & Solutions

- Do not include electronic titles in the built-in Publish job; they will always publish as deletes.
- Confusion over when to use the "Publish to OCLC" flag.
- Alma defaults in most cases to "Publish to OCLC" which means brief records, on-the-fly records, etc., will publish.
- Some import profiles will not allow you to set records that come in as "Publish to OCLC" and will not get appropriate flag.
- File name conventions.



Create a separate process for electronic titles and remove publish flag from them.



Notify all staff to check and update the publish status on brief records.



Publish flag can also be set in the normalization process attached to a profile.



OCLC can manage files that don't match the convention for you.

Deletes Then & Now

The old way:

- Scan barcodes to generate lists of record IDs
- Export lists of record IDs from Alma
- Using Analytics to generate reports of OCLC numbers from lists of record IDs *before* deleting records from Alma
- Delete records in Alma
- Hand off list to Cataloging
- Load lists of OCLC numbers in batches to OCLC to delete

-or- make changes one-by-one in OCLC for smaller issues

The new way:

- Scan barcodes to generate lists of record IDs
- Delete records in Alma

System handles the rest!

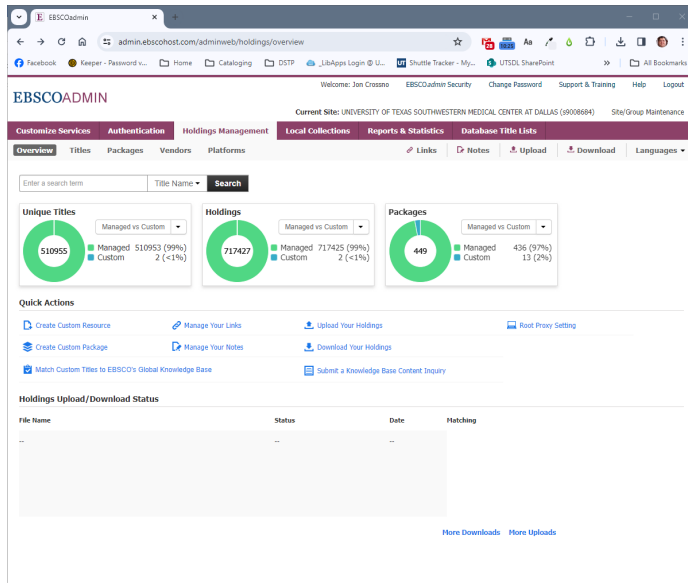
Resources to Get Started

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/090Integrations_with_External_Systems/030Resource_Management/110Publishing_to_OCLC](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/110Publishing_to_OCLC)

[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/090Integrations_with_External_Systems/030Resource_Management/110Publishing_to_OCLC#Publishing_Electronic_Holdings_to_OCLC](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/110Publishing_to_OCLC#Publishing_Electronic_Holdings_to_OCLC)

https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Troubleshooting/How_do_I_synchronize_holdings_between_Alma_and_WorldCat

UT Southwestern "How" — Part 1



EBSCO Publication Finder

- Select "Download Your Holdings"
- Choose filters
- Set a filename
- Create the file and save it locally

UT Southwestern "How" — Part 2

Microsoft Excel

- Power Query is my friend
- Get data from the saved EBSCO file
- Data cleanup may be necessary (the first time)
- Save the file as "Unicode Text (.txt)"

EBSCO Holdings_Export - Power Query Editor

Table.SelectRows(#"Removed Columns", each ([HideOnPublicationIndex] = "N") and (

KBID	Title	PackageName
2837	AJR, American Journal of Roentgenology	Publisher's Site
3863	American Journal of Public Health	Publisher's Site
4125	American Review of Respiratory Disease	Publisher's Site
11019	BMJ: British Medical Journal (International edition)	Publisher's Site
17462	The Chronicle of Higher Education	Publisher's Site
21501	Critical Reviews in Oral Biology & Medicine	Publisher's Site
28176	FDA consumer	Publisher's Site
28381	Family Planning Perspectives	Publisher's Site
28556	Federal Register (USA)	Publisher's Site
32256	Health Affairs	Publisher's Site
34444	Imaging: An International Journal of Clinico-Radiological Practice	Publisher's Site
36201	International Family Planning Perspectives	Publisher's Site
39613	Journal of Clinical Investigation	Publisher's Site
40797	Journal of Health Politics, Policy and Law	Publisher's Site
40949	Journal of Immunology, The	Publisher's Site
41766	The Journal of Neuroscience: The Official Journal of the Society for Neuroscience	Publisher's Site
41815	Journal of Nuclear Medicine: JNM	Publisher's Site
43061	Journal of the American Society of Nephrology - JASN	Publisher's Site
43249	Journal of the History of Medicine and Allied Sciences	Publisher's Site
49406	Morbidity and Mortality Weekly Report: Recommendations and Reports	Publisher's Site
49408	Morbidity and Mortality Weekly Report: MMWR Weekly Past Volumes	Publisher's Site
49650	Molecular biology of the cell	Publisher's Site
49949	Monthly Vital Statistics Report	Publisher's Site
51068	Navy medicine	Publisher's Site
51953	The New York Times	Publisher's Site
52225	NDA notes	Publisher's Site
52351	Prevention & Treatment	Publisher's Site
58508	Psychological Medicine	Publisher's Site

30 COLUMNS, 999+ ROWS Column profiling based on top 1000 rows

PREVIEW DOWNLOADED AT 6:36 PM

UT Southwestern "How" — Part 3

- Upload the file to OCLC
- Using FileZilla
- Send email to OCLC Support that file has been uploaded

For more information:

[Map titles from an alternate knowledge base supplier \(OCLC Support\)](#)

Advice

- Don't expect it to work the way you want on the first try.
- "It wouldn't do that, would it?" It would. Expect the unexpected.
- You may need multiple publishing configurations.
- Enlist Cataloging folx to verify if synchronization behavior is correct.
- Don't assume a suppressed record won't publish; they are separate system flags!

Advice

- Be patient.
- If you run into errors or problems, work through each step to find out where the process is breaking.
- A step-by-step handout is available, which includes the query text I use in Power Query.

Q&A Session

Join us during our scheduled
Q&A session

March 5, 2024 at 9:45 – 11:15am CST

**Because
what is
known must
be shared.®**