

DRAFT: WorldShare Collection Manager (WCM) to Alma procedures

These procedures describe...

1. [Adding new WCM collections to the scripts](#)
2. [Quality checks on new record imports](#)
3. [Adding/Updating OCNs in WorldShare Collection Manager](#)
4. [Processing problem updates and merges records](#)
5. [CONTINGENCY PLAN: Processing sorted update records manually](#)
6. [CONTINGENCY PLAN: Getting script-processed update records onto the server](#)
7. [Appendix: Sample import profile configuration](#)

Adding newly activated WCM collections to the record evaluation scripts *[section needs expansion]*

1. New collections should not need to be added to the scripts, because we have changed the architecture of how the filenames are matched (now it picks up anything new with “new,” “updates,” or “merges” in the filenames.)
2. A new import profile will be needed for the “new” records, however [separate procedures for this are in a different document.]
3. Depending on delivery frequency, you should check to make sure that expected files are being picked up and processed by script.

Quality checks on new record imports

These procedures describe manual checks to perform on pre-identified e-book records automatically imported from OCLC’s Worldshare Collection Manager (WCM). Multi-volume records need to be checked to ensure URLs for other volumes were not overwritten. Records with cataloging languages other than English need to be checked. In addition, we need to check on any records for print versions which have been used for e-versions.

The files that you will be accessing for this procedure are generated by one of three python scripts depending on the frequency of record delivery for the given collection (WCM-ftp-checks-new-daily.py, WCM-ftp-checks-new-weekly.py, WCM-ftp-checks-new-monthly.py).

Identifying OCNs to check

1. Collections with records activated and managed through WCM are listed in the “Worldshare Collection Manager sets” tab of the shared [“Ebook Title Level Cataloging”](#) spreadsheet in Drive. This spreadsheet also indicates which collections are currently set up to enable auto-imports of records into Alma.
2. A python script has been developed (“WCM-ftp-checks-new-DWM.py”) which fetches files from WCM from the OCLC FTP server every week day. The script then performs checks on the records to identify potential multi-volume records, records cataloged in any language other than English, and records for print materials. Files including lists of OCNs which require manual checking are placed into appropriate folders. These files are currently placed on the lib-interop server, but will be placed on a shared drive for mutual access.
3. The folder of files will include the date it was generated. Prioritize the oldest dates first. New files will be added weekly as needed.

Multi-volume records

1. Open the “dups – [date]” file you will be processing. Then number of potentially multi-volume records you will need to check will be listed at the top of the spreadsheet next to the “Number of records with volume in description” heading. If any “duplicate OCNs” are present, you will need to check these as well.
2. Click on the “has volume” cell. On the “Data” ribbon, select the filter button. Click the small triangle button which appears on the cell to open the filter configurations. Unclick the box next to “(Blanks)”. [You would use this same method to filter the “is duplicate” column if needed – this is rare.]
3. If any of the OCNs in your list are preceded by “ocn” or “on”, optionally use the Find/Replace function (press CTRL+ F, then select the “Replace” tab in the dialog window) to find “ocn” or “on” and replace with “”. Be sure to select the “Options” button and check the box next to “Match case” so only lowercase ocn prefixes will be removed. You can also just manually remove the prefix when searching Alma.
4. Copy the value of the first OCN in your filtered list. Paste this value into the Alma repository search box. Press “Enter”.
5. If your search returns more than one record, this is a **multi-match**. See separate instructions for resolving multi-matches at the end of this document before proceeding with the next steps.
6. On your working spreadsheet, the abbreviated collection name should be listed in the filename. You will be looking at the record that has a portfolio attached for this collection.
7. Click the title of the record to look at the bib record. Examine the record to decide if it appears to be for a multi-volume work. Click “Back”.
8. Examine the portfolio(s).
 - a. Click on the “Portfolio List”.
 - b. For each portfolio attached which belongs to the electronic collection you are working on:

- i. Click "View".
- ii. Click on the "History" tab.
 1. **If the "History" tab is blank**, you know that a previous URL has not been over-ridden.
 - a. Click the "Linking Information" tab to find the URL. Test the URL to make sure the volumes listed make sense in comparison with the information you saw when examining the bib record. If only a specific volume or part is accessible by the given URL, add a "Public Note" under the "Notes" tab for the portfolio with this information.
 2. **If this tab is not blank**, test each URL which has been changed to see if they resolve to the same page.
 - a. If they do, you are done with this record, it is fine.
 - b. If they do not, you will need to **add another Local Portfolio** for the over-written URL.
 - i. Copy the "Old URL" from the "History" tab in the portfolio.
 - ii. Use the "Cancel" links to go back two pages to the search results page. Click the "Edit" link for the record you are working on. This should launch the record in the metadata editor.
 - iii. Click the small clipboard button to "View Inventory" on the record. In the Portfolio tab of the inventory pane, there should be a button labeled "Add Local Portfolio" which you should click.
 - iv. Leave the radio button selected next to "Use existing title". Change the "Portfolio type" under the "General Information heading" to "Part of an electronic collection". Select the Electronic collection you are working on by clicking on the blue arrow at the right end of the field, searching for, and selecting the appropriate collection.
 - v. Paste the URL you copied from the "Old URL" in the "History" tab into the "URL" field. Select "Book" from the "Electronic material type" drop-down.
 - vi. Enter the volume number in the "Public note" field.
 - vii. Click "Go".
 - viii. Edit any other portfolios on the record to add a "Public note" with volume/part number represented by that URL.
 - ix. Release the record from the metadata editor.
9. Annotate the spreadsheet with your OCN list with any actions taken, and if the record was okay or not.
10. Repeat steps 4-9 for each OCN on your list.

Additional checks

1. For each file in the “analyses” folder, you can see the original file name, which gives you an indication of the electronic collection it belongs to.
2. For each of these files, search for the WCM auto import profile, and check the import profile job history for the date most closely following the date on the filename (“Actions”>>“Job History”).
3. For the import that has run on that date, click on the “Actions” button, and select “Report”. In the report, in the “Electronic Portfolios” tab, look at the number of portfolios imported/added/updated/deleted/etc. For each of these categories that are not simply “added”, you can preview the affected records using the “Actions” menu to the right of the number and selecting “Preview records”. Follow the multi-volume checking procedures above to check for and/or fix any URLs overwritten in these records.

Non-English cataloging language records

1. Open the sheet in the workbook you’ll be working on for the non-english language records. Filter for records needing work by clicking on the “non-eng lang?” cell, clicking the “Filter” button on the “Data” ribbon, clicking the small triangle button that appears, and de-selecting the box next to “(Blank)”.
2. If any of the OCNs in your list are preceded by “ocn”, use the Find/Replace function (press CTRL+ F, then select the “Replace” tab in the dialog window) to find “ocn” and replace with “”. Be sure to select the “Options” button and check the box next to “Match case” so only lowercase ocn prefixes will be removed.
3. Copy the value of the first OCN in this filtered list. Paste this value into the Alma repository search box. Press “Enter”.
4. If your search returns more than one record, this is a **multi-match**. See separate instructions for resolving multi-matches at the end of this document before proceeding with the next steps.
5. On your working spreadsheet, the collection name should be listed in the upper right-hand corner. You will be looking at the record that has a portfolio attached for this collection.
6. Click the title of the record to look at the bib record.
 - a. Look at the **040 field**. The language of cataloging should be listed in subfield b in this field.
 - i. **If \$\$b is present** and the value is any other than eng, this record was cataloged in a language other than English, and you will need to see if an English-language version is available.
 1. Launch OCLC Connexion Client. In the search box, enter the pound sign (#) followed by the OCN you are working with.
 2. **If there is no suitable English language record**, you may accept the current record as-is. Mark the record fine and move on to the next OCN.
 3. **If there is a suitable English language record** for the electronic work, you will need to **update the OCN listed in WCM**. Follow

the procedures in “Adding OCNs to WorldShare Collection Manager” procedures document. Sections “Logging into WCM” and “Adding your changes to WCM” will help you to update the OCNs you have identified through this process.

- ii. **If there is no subfield b**, but the record is such that you believe that the language of cataloging was English, update the record in Alma and OCLC to add the \$\$b eng to the 040 field.
 1. Click “Edit” to send the record to the metadata editor. The \$\$b should be placed inbetween the value for \$\$a and before \$\$e for cataloging rules. Save and release the record.
 2. Launch OCLC Connexion Client. In the search box, enter the pound sign (#) followed by the OCN you are working with.
 3. Add the \$\$b eng to the 040 field on the master record (after the value for \$\$a and before the \$\$e.)
 4. Under the “Action” menu, select “Replace record.”
 5. Close out of the record in OCLC, and annotate your working spreadsheet accordingly.
7. Repeat steps 3-6 for all OCNs on the filtered list.

Records for print materials

1. Open the sheet in the workbook you’ll be working on for the print records. Filter for records needing work by clicking on the “print record?” cell, clicking the “Filter” button on the “Data” ribbon, clicking the small triangle button that appears, and de-selecting the box next to “(Blank)”.
2. If any of the OCNs in your list are preceeded by “ocn”, use the Find/Replace function (press CTRL+ F, then select the “Replace” tab in the dialog window) to find “ocn” and replace with “”. Be sure to select the “Options” button and check the box next to “Match case” so only lowercase ocn prefixes will be removed.
3. Copy the value of the first OCN in this filtered list. Paste this value into the Alma repository search box. Press “Enter”.
4. If your search returns more than one record, this is a **multi-match**. See separate instructions for resolving multi-matches at the end of this document before proceeding with the next steps.
5. On your working spreadsheet, the collection name should be listed in the upper right-hand corner. You will be looking at the record that has a portfolio attached for this collection.
6. Click the title of the record to look at the bib record.
 - a. Examine the record for indicators that it is for a print item instead of an electronic item. These could include:
 - i. \$\$a of the 300 field
 - ii. Absence or presence of 006 and/or 007 fields, as well as position 23 of the 008 field
 - iii. Values given in any 33X fields present on the record
 - iv. 776 linking fields to other versions (print or electronic)

- b. If the record seems to actually be a record for an electronic version of an item, accept the record as-is, annotate your spreadsheet accordingly, and move to checking the next OCN in your list.
 - c. If the record seems to be for a print version of an item:
 - i. Launch OCLC Connexion Client. In the search box, enter the pound sign (#) followed by the OCN you are working with.
 - ii. **If there is no electronic record** in your search results, you may accept the current record. Mark the record accordingly on your spreadsheet and move on to the next OCN.
 - iii. **If there is a suitable electronic record** in your search results, you will need to **update the OCN listed in WCM**. Follow the procedures in “Adding OCNs to WorldShare Collection Manager” procedures document. Sections “Logging into WCM” and “Adding your changes to WCM” will help you to update the OCNs you have identified through this process.
7. Annotate your working spreadsheet with information about what you found and/or any changes made.
8. Repeat steps 3-7 for each OCN in your filtered list.

Resolving multimatches

1. If an OCN you are checking leads you to discover a multi-match in Alma, follow the local policies and procedures found in the “Merging Monographic Bibliographic Records in Alma” documentation.
2. Once you have completed the decision-making and any editing thus required as guided by this document, continue the instructions you were previously following, using either the selected, un-merged record OR the resulting merged record to complete the process, as appropriate.

Adding/Updating OCNs in WorldShare Collection Manager

These procedures describe how to add OCLC numbers (OCNs) to collections we receive records for through the Worldshare Collection Manager (WCM). If records do not have OCNs in WCM, we do not receive the record for our local systems, so the item is not discoverable in MNCAT. By adding OCNs, we increase the number of licensed items which our users can find and access.

Logging into WCM

1. From the URL <https://share.worldcat.org/myaccount>, click on the button for WorldShare Management Services.
2. Select the institution’s OCLC symbol (MNU) from the drop-down menu, then click Continue.
3. Enter your username and password, then press Enter.

4. Select the branch “University of Minnesota, Minneapolis” by clicking on it to highlight it in the dialog box. Click OK.
5. Click the “Metadata” tab.
6. On the left side of the interface, click to expand the “Collection Manager” sidebar.

Identifying collections to work on

1. Collections with records activated and managed through WCM are listed in the “Worldshare Collection Manager sets” tab of the shared [“Ebook Title Level Cataloging”](#) spreadsheet in Drive.
2. Prioritize work on collections in this list which adhere to the following criteria:
 - a. **Perpetual access** license (indicated with a “yes” value in the “perpetual access?” column).
 - b. **Coverage less than 80%.** (Coverage has fluctuated over time, so use most recent coverage information available on the spreadsheet.

Identifying records to work on

1. Find the title of the collection you will be working on. This is recorded in the “different collection title?” column of the spreadsheet.
2. In WCM, search this title in the Collection Manager sidebar text box. Keep the default search setting of “Collection” and “My Selected Collections” checked. Click Search.
3. Identify which search result corresponds to the collection you are searching for. Ensure that the green check icon appears next to the bolded word “Held” in the “In My Holdings” column.
4. Click on the title (should be linked, blue, underlined text) of the collection. This should open a detailed, title-level view of the collection records.
5. On the Titles accordion menu header, click the drop-down menu “More Actions”. Choose “Download”.
6. In the dialog box that appears, retain the default setting for Titles in local holdings, KBART, and UTF-8. Click Download.
7. In the next dialog, choose to Save File, and click OK.
8. Save the file in a folder where you will be working on it.
9. Import the data into Excel:
 - a. Open a new blank Excel spreadsheet. Save the file with a filename related to the collection name followed by the date (MM-DD-YYYY) in the working folder.
 - b. Click on cell A1 in the spreadsheet.
 - c. In Excel, in the Data ribbon, click the button “From Text”. When the dialog for Import Text File appears, select the KBART file you just downloaded from WCM. Click Import.
 - d. In step 1 of the Text Import Wizard, choose the original data type “Delimited”. In the File origin dropdown, choose “65001 : Unicode (UTF-8)”. Click the checkbox next to “My data has headers.” Click Next.
 - e. Data should be tab delimited. If the preview looks ok, click Next.
 - f. Set the data format to “Text”:

- i. Select all columns in the preview window by clicking on the first column, using the scroll bar to scroll as far right in the window as possible, shift-clicking on the last column in the preview.
 - ii. Select the radio button next to "Text" in the Column data format box.
 - iii. Click Finish.
 - g. In the next dialog window, tell Excel to put the data in the "Existing worksheet" Click OK.
 - h. You may wish to format the header row in bold font or with a background cell color to distinguish it from your data.
10. To get a record count, click on the column letter of the "ACTION" column to highlight the entire column. On the bottom info bar, a count should appear. This is the number of values in the cells (and it includes your column header value). By subtracting 1 from this number, you know the number of records in the file.
11. To get a count of the records which have OCLC numbers (OCNs), follow the same process of highlighting the column and subtracting one from the count.
12. If number of records and the number of records which have OCNs are not the same, you know there are records to edit in the batch.
13. Filter the "oclc_number" column by blank values to find the records to edit:
 - a. Highlight the column.
 - b. In the Data ribbon, click the Filter button.
 - c. Click on the small gray button with a triangle on it that appears at the top of the column.
 - d. Uncheck the checkbox for "(Select All)" to deselect all records. Then click the checkbox for "(Blanks)". Click OK. The filtered records are the ones you need to work on.

Looking up OCNs in Connexion Client and choosing a record

[You may also use the function in Alma to search WorldCat, if you do not have access to Connexion Client.]

1. Copy the "online identifier" (e-ISBN) of the record you wish to search for.
2. Launch OCLC Connexion Client.
3. In the search box in the top toolbar, paste the e-ISBN copied in step 1.
4. Hit the Enter key.
5. If multiple records appear, choose which record to use:
 - a. Choose View > List Type > Brief (if not already set).
 - b. The record you are looking for will most likely contain "[ELECTRONIC]" in the record description in this view.
 - c. Prefer the record with the most holdings on it in this view. Double-click on this record to open it and further evaluate it.
 - d. Prefer records with DLC or PCC cataloging. Prefer blank or I level records.
 - e. Compare the following information:

Connexion search result record	Data in the KBART WCM download
Field 006: has letters m o d	Column coverage_depth = ebook

Field 020: ISBNs	Columns print_identifier, online_identifier: ISBNs
Date in field 260 or 264 matches	Column date_first_issue_online
Field 300: contains text "1 online resource" or similar	
Field 337: contains text "computer" or similar	
Field 338: contains text "online resource" or simi	
Has 856 fields, preferably one with a link similar to the KBART data	Column title_url

Not all criteria need to be met, but enough to feel confident in your selection.

If multiple e-resource records are available for the title you are searching, choose the most-accurate looking record, with the fullest (most complete and detailed) information (author in 1XX/7XX fields, subject headings in 650 fields, etc.)

- f. Once you have found a satisfactory record, copy the OCLC number from the top left corner of the record header (next to the linked "OCLC" text and "Held by MNU - # other holdings"). Paste this value into your working KBART spreadsheet.
6. If only one record appears (indicative of one search result), follow the evaluation process in steps 5d through 5e above.
7. If you do not find any matching records, leave blank.

Adding your changes to WCM

1. Once you have found OCLC numbers for as many of your identified records as possible, you will need to manually enter each value into the WCM interface:
 - a. In WCM, in the collection title-level view, click on the highlighted title of the record you want to update.
 - b. In the "Override OCN" box, paste the OCLC number you found in Connexion.
 - c. Click the Save button in the upper right corner of the screen.
 - d. You may be asked to confirm the action you are taking, or enter text justifying the change. If so, follow prompts, and enter "Supplied missing OCN" as the reason for the update.
2. Repeat step one for each OCN you looked up and selected.
3. Enter data about the work you completed in the Ebook Title Level Cataloging spreadsheet on drive.

Processing problem updates and merges records

These procedures are for processing records that are automatically imported into Alma, but which are not imported because they do not match an existing record in Alma ("no matches"), or because they match more than one record in Alma ("multi-matches").

Processing steps include:

- Manually handle any "no matches" and/or "multi-matches"

- Manually handle any URL updates

Manually handle any “no matches” and/or “multi-matches”

1. Navigate in Alma to the “Manage Import Profiles” interface.
2. Search for “WCM” and you should find the import profiles which handle merges and updates called “all WCM bibs w/ ocn merges - ALL COLLECTIONS auto ebook import: WCM” and “all WCM bib updates - ALL COLLECTIONS auto ebook import: WCM”. These import profiles should be running daily and importing records whenever new records have been placed on the server by the fetching scripts.
3. Open the tracking spreadsheet for this process (“WCM update problems”).
4. For the “merges” import profile, click on the “...” button, and select “Job History” from the drop-down.
 - a. For any date that the import profile ran which is not already on your tracking spreadsheet:
 - i. Click on the “...” button and select “Report” from the drop-down menu.
 - ii. Expand the “Records Not Imported” section of the report.
 - iii. If there are any **“Records not imported upon no match”** or **“Records not added (automatic multi-match)”**, click on the “Actions” button, and select “Download sources (binary)”. Save the .zip file that is created with a meaningful name (such as “merges-2017-12-11-nomatches”) in the folder you are working in.
 - iv. Add details about the files you just downloaded to the tracking spreadsheet.
 - v. Unzip and open the “no match” record file you just downloaded. Search for these records in Alma by title or other non-OCN information to see if a record for the same resource in the same collection does exist in Alma.
 1. If so, update the OCN in Alma to match the new OCN in the “no match” record.
 - vi. Use the WCM manual import profile for the collection your file belongs to to import the “no match” records you have just checked into Alma.
 - vii. Move the folder with the records into the “done” folder you created.
 - viii. Unzip and open the “multi-matches” record file you downloaded. Search for these records in Alma (you can use OCN for these records) to find all multi-matches. Merge any of these as appropriate.
 - ix. If there is only one record remaining after these merges, you will not need to manually select a record to merge with. If there are more than one, you will need to select a record to merge with in the multi-match manual handling job.
 - x. Use the WCM manual import profile for the collection your file belongs to with the handle multi-matches manually feature turned on. Handle any multi-matches manually using the built-in interface and the information you learned in step ix.
 - xi. Move the file you just uploaded into the “done” folder.

5. Repeat step 4 for the “updates” import profile, until you have downloaded and processed all the files and they are all in the “done” folder.

URL changes/additions

There haven’t been any of these for several months, but it’s still worth checking.

1. Open the “URL updates” folder for the date you are working on.
Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\URL updates 2017-07-13”
2. Create a new folder called “done”.
Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\URL updates 2017-07-13\done”
3. Open the first file in the folder using MarcEdit.
4. For each record in the file:
 - a. Copy the URL from the record (found after the =856 \$u...) and paste into a new window in your browser.
 - b. Copy the OCLC number (found after the =035 \$a(OCOLC)...) and paste into Alma to search it.
 - c. For the record already in Alma, click the “View It” link.
 - d. If the record is for a multi-volume set:
 - i. Click the link for the volume that matches the one that came up when you searched the resource URL.
 1. If the link is the same as the one you searched, it is okay to leave alone.
 2. If the link in Alma resolves to an error, replace it with the new link.
 - a. Click “Portfolio List”.
 - b. Click “Edit Portfolio” until it brings up the portfolio volume you wish to edit.
 - c. Under the “Linking information” tab, paste the new URL in the “Static URL” field.
 - d. “Save” the record.
 3. If the link in the update record is not the same as the one in Alma, and both work, add a new portfolio to the record:
 - a. Click “Edit record”.
 - b. Click on the little clipboard icon for “View inventory”.
 - c. Click the “Add Local Portfolio” button.
 - d. Use existing title.
 - e. Add as “Part of an electronic collection.” Use the blue arrow at the end of the “Electronic Collection” field to search for and select the appropriate electronic collection.
 - f. Paste the URL from the update record into the “URL” field.
 - g. Select the appropriate “Electronic material type” (usually this will be “Book”).

- CONTINGENCY PLAN: Processing sorted WCM update files (manual upload) if the script is not automatically placing them on server

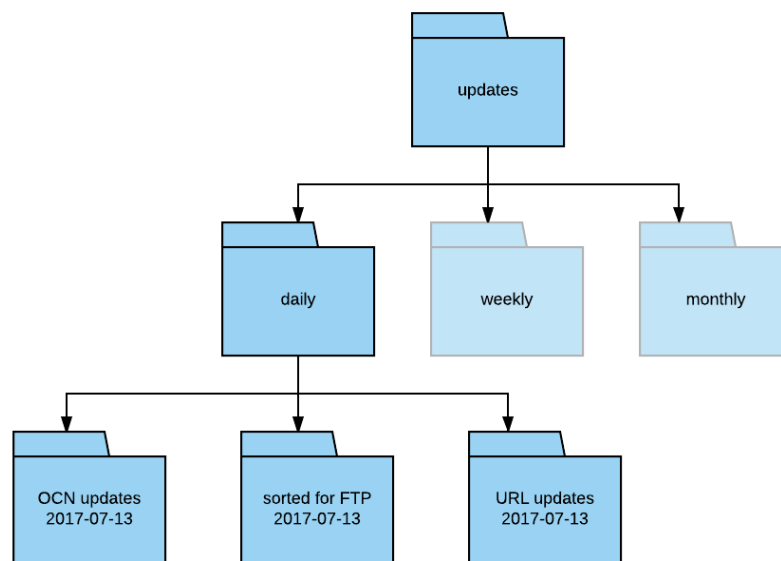
Author: Kelly Thompson, in consultation with Stacie Traill

them. In the case that that script is not working, you would need to follow these instructions to do it manually.

Processing steps include:

- Upload files to Alma [until auto-import is implemented -- currently waiting for server access to automate this portion of the workflow]
- Check OCN changes
- Manually handle any KB URL changes/additions

The scripts are set to run either daily, weekly, or monthly, depending on the record delivery configuration for a given collection in WCM. Once run, the scripts create folders of record files [currently on my local machine, but eventually on the shared server] labeled with the date the script ran.



Upload files to Alma

(I process the “update” files after all “new” files have been processed. I start with any monthly updates, then weekly, then daily. I also process the files oldest to newest.)

1. Navigate into the “sorted for FTP folder” with the oldest date.
Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\sorted for FTP 2017-07-13”
2. Create a new folder called “done”.
Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\sorted for FTP 2017-07-13\done”
3. In Alma, navigate to the appropriate import profile for the collection pertaining to the first file in the folder. All of the import profiles used in this process should have “WCM” in the

name, so you can search for this to help you find all the import profiles. Use the following key to help you:

File pattern	Update frequency	Import profile name
clinicalkey	daily	ClinicalKey bib/ocn updates...
knovel	daily	Knovel - bib/ocn updates for ebooks...
mcghill	daily	McGraw-Hill AccessMedicine bib/ocn updates...
scidirall	daily	ScienceDirect (Elsevier) bib/ocn updates...
statref	daily	STAT!ref bib/ocn updates...
acssymp2*	weekly	ACS Symp bib/ocn updates...
bloompopmus	weekly	
cqpresswid	weekly	
ieeewiley	weekly	IEEE-Wiley bib/ocn updates...
iopebooks	weekly	
llmc	weekly	LLMC bib/ocn updates...
napmonos	weekly	National Academies Press mono bib/ocn...
ovidipc	weekly	
oxrefp	weekly	Oxford Reference bib/ocn updates...
serllmc	weekly	LLMC bib/ocn updates...
springerbttaa20*	weekly	SpringerLink BTAA bib/ocn updates...
springerengint	weekly	SpringerLink bib/ocn updates...
wageningenap	weekly	Wageningen bib/ocn updates...
acssymp1*	monthly	ACS Symp bib/ocn updates...
sageKRec	monthly	Sage bib/ocn updates...
sageKRhb	monthly	Sage bib/ocn updates...
wageningenap	monthly	Wageningen bib/ocn updates...

4. Run the import profile with the file.
 - a. Click on the “Actions” button, and select “Run import” from the drop-down.
 - b. Click on the folder icon, navigate to the file you wish to upload, select it, and click “Open”.
 - c. Click “Add”.
 - d. Click “Submit”.
5. Once the import is completed successfully, click on the “Actions” button and select “Report” from the drop-down.
 - a. If the file belongs to a **Springer** collection – if there are records not imported:
 - i. Expand the “Records Not Imported” section of the report.
 - ii. If there are any “**Records not imported upon no match**”, click on the “Actions” button, and select “Download sources (binary)”. Save the .zip file that is created with a meaningful name (such as “springerbttaa-no-matches”) in the folder you are working in.
 - iii. Use the WCM manual import profile for the collection your file belongs to to import these records into Alma.
 - iv. Move the folder with the records into the “done” folder you created.
6. Move the file you just uploaded into the “done” folder you created.

7. Repeat this process until you have uploaded all the files and they are all in the “done” folder.
Move the entire folder for the day (*Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\sorted for FTP 2017-07-13”*) into the “done” folder at it’s directory level (*Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\done”*).
8. If there is a corresponding “URL updates” folder with the same date as the “sorted for FTP” folder you just processed, process it according to the “URL changes/additions” instructions in the next section of this document.
9. Repeat steps 1-8 until all files in all folders have been processed.

URL changes/additions

1. Open the “URL updates” folder for the date you are working on.
Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\URL updates 2017-07-13”
2. Create a new folder called “done”.
Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\URL updates 2017-07-13\done”
3. Open the first file in the folder using MarcEdit.
4. For each record in the file:
 - a. Copy the URL from the record (found after the =856 \$u...) and paste into a new window in your browser.
 - b. Copy the OCLC number (found after the =035 \$a(OCOLC)...) and paste into Alma to search it.
 - c. For the record already in Alma, click the “View It” link.
 - d. If the record is for a multi-volume set:
 - i. Click the link for the volume that matches the one that came up when you searched the resource URL.
 1. If the link is the same as the one you searched, it is okay to leave alone.
 2. If the link in Alma resolves to an error, replace it with the new link.
 - a. Click “Portfolio List”.
 - b. Click “Edit Portfolio” until it brings up the portfolio volume you wish to edit.
 - c. Under the “Linking information” tab, paste the new URL in the “Static URL” field.
 - d. “Save” the record.
 3. If the link in the update record is not the same as the one in Alma, and both work, add a new portfolio to the record:
 - a. Click “Edit record”.
 - b. Click on the little clip board icon for “View inventory”.
 - c. Click the “Add Local Portfolio” button.
 - d. Use existing title.

- e. Add as "Part of an electronic collection." Use the blue arrow at the end of the "Electronic Collection" field to search for and select the appropriate electronic collection.
 - f. Paste the URL from the update record into the "URL" field.
 - g. Select the appropriate "Electronic material type" (usually this will be "Book").
 - h. If the item is part of a multi-volume set, add volume information in the "Public note" field.
 - i. Click "Go".
 - e. If the record is for a single-volume monograph:
 - i. Click the link to view the resource.
 1. If the link is the same as the one you searched, it is okay to leave alone.
 2. If the link in Alma resolves to an error, replace it with the new link.
 - a. Click "Portfolio List".
 - b. Click "Edit Portfolio".
 - c. Under the "Linking information" tab, paste the new URL in the "Static URL" field.
 - d. "Save" the record.
 3. If the link in the update record is not the same as the one in Alma, and both work, add a new portfolio to the record:
 - a. Click "Edit record".
 - b. Click on the little clip board icon for "View inventory".
 - c. Click the "Add Local Portfolio" button.
 - d. Use existing title.
 - e. Add as "Part of an electronic collection." Use the blue arrow at the end of the "Electronic Collection" field to search for and select the appropriate electronic collection.
 - f. Paste the URL from the update record into the "URL" field.
 - g. Select the appropriate "Electronic material type" (usually this will be "Book").
 - h. If the item is part of a multi-volume set, add volume information in the "Public note" field.
 - i. Click "Go".
 5. Once you have checked each record in the MARC file, move the file into the "done" folder you created.
 6. Repeat steps 1-5 until all records in all files have been processed.
 7. Move the "URL updates" folder to the "done" folder at its directory level (*Example: "C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\done"*).

OCN changes

Based on our current testing, record updates that involve OCN changes appear to be working smoothly. The files generated in this folder can be ignored unless issues arise.

CONTINGENCY PLAN: Getting script-processed WCM update files onto the server if the script is not automatically placing them

These procedures describe how to put WorldShare Collection Manager (WCM) update files that have been processed by Python scripts onto the lib-interop server if the script is not doing so for whatever reason. This is in lieu of the section above where files are manually uploaded. An Alma auto-import profile will pick up the files once they are on the server.

Processing steps include:

- Upload files to home space on the server
- Sudo into the server
- Move the files from home directory to almaprod directory

Upload files to server home directory

1. Navigate into the “sorted for FTP folder” with the oldest date.

Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\sorted for FTP 2017-07-13”

2. Create a new folder called “done”.

Example: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\sorted for FTP 2017-07-13\done”

3. Make sure you are connected to the VPN.
4. In the SSH Secure File Transfer client, connect to lib-interop.oit.umn.edu using your own x.500, password, and Duo authentication.
5. Upload the files from your PC to a designated folder in your home directory on the server.

Example: /home/myNetID/WCM

6. Move the files you just uploaded into the “done” folder you created.
7. Move the entire folder for the day into the “done” folder at its directory level.

Example folder: “C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\sorted for FTP 2017-07-13”

Example done folder at directory level: "C:\Users\myNetID\Documents\WCM\file fetching\updates\daily\done"

8. Repeat steps 1-7 with all "sorted for FTP" folders until you have uploaded all the files and they are all in the "done" folder.
9. If there is a corresponding "URL updates" folder with the same date as the "sorted for FTP" folder you just processed, process it AFTER the upload process in Alma has completed. Use the "URL changes/additions" instructions in the "Processing sorted WCM update files" procedures for this.

Move the files from your home directory to the almaprod directory

1. In the SSH Secure File Transfer client, where you are still logged in as yourself, open a new terminal window.
2. "sudo" into the swadm account with the command:

sudo su – swadm

3. Change directories to the folder you just uploaded all the files to:

cd /home/myNetID/WCM

4. Copy all files you just uploaded to your folder using the command:

cp * /swadm/sftp/almaprod/alma/WCM

You can substitute any individual filename or other file specification for the '*' in the cp command.

5. Alma import profiles should automatically find the new files as scheduled. You can periodically delete old files once you verify they have been loaded into Alma.

mkdir [name] = make directory

mv [old name] [new name] = move/rename directory

rm [file] = remove/delete

To move uploaded files to "done" folder:

cd /swadm/sftp/almaprod/alma/WCM

mv *.mrc done

Import Profile Details	
Profile Details	Inventory Information
<div>Profile Details</div> <div><div>Profile name * Profile description</div><div>Knovel - bib/ocn updates for ebooks auto import profile: WCM bib and/or ocn updates for Knovel ebook records - scheduled import. (Will automatically connect to libinterop FTP daily to check for Knovel files.)</div><div><div>Originating system * Import Protocol</div><div>Worldshare Collection Manager FTP</div><div><div>Physical source format</div><div>Binary</div><div><div>Encoding format</div><div>UTF-8</div><div><div>Source format</div><div>MARC21 Bibliographic</div><div><div>Status</div><div>Active</div></div></div></div><div><div>File name patterns</div><div>metacolMNUupdates*knovel*mrCZ</div><div><div>Cross walk</div><div><input type="radio"/> Yes <input checked="" type="radio"/> No</div><div><div>Target format</div><div>MARC21 Bibliographic</div></div></div></div></div><div><div>Scheduling</div><div><div>Files to import</div><div><input type="radio"/> All <input checked="" type="radio"/> New</div><div><div>Scheduler status</div><div><input type="radio"/> Active <input checked="" type="radio"/> Inactive</div><div><div>Scheduler *</div><div>Not scheduled</div></div></div><div><div>Email Notifications</div></div></div></div><div><div>FTP Information</div><div><div>Description</div><div>Server</div><div>lib-interop.olt.umn.edu</div><div><div>UserName</div><div>almaprod</div><div><div>Input directory</div><div>alma/WCM</div><div><div>Max. Number of Files</div><div>10</div><div><div>Max. file size</div><div>10</div><div><div>Ftp Server Secured</div><div><input checked="" type="checkbox"/></div></div></div></div></div><div><div>Port</div><div></div><div><div>Password</div><div>.....</div><div><div>Size type</div><div>GB</div><div><div>FTP Passive Mode</div><div><input type="checkbox"/></div></div></div></div></div><div><div>Test Connection</div></div></div></div></div></div></div> <div data-bbox="1101 1140 1144 1738" data-label="Text"><p>Appendix: Sample import profile configuration</p></div> <div data-bbox="977 1965 1115 1999" data-label="Text"><p>Stacie Traill</p></div>	