

Design Specifications for Project X

Revised January 21, 2019

This document serves to present design objectives for Project X, a replacement for the OSMOSIS services Illinois LLSAPs have relied upon for decades.

The purpose of this process is to accurately reflect library holdings in OCLC.

Ideally, this service would have the following specifications:

- Hosted in the cloud
- All participants would have an administrative interface to access and maintain their own translation tables and processing parameters
- Standard input file format (MARC) for universal compatibility
- The option to customize the input file (either within the service or under local control) via processing parameters (or use of none)
- Uses a previous bibliographic extract as a point of comparison to capture adds, deletes, and transfers of holdings
- A shared, statewide service for all LLSAPs to use

Process:

1. Create Translation Tables
 - a. LLSAP | Library Code (local) | OCLC Symbol | Y/N to include
2. LLSAP creates a MARC export and places in FTP repository for processing
 - a. 9XX for each item (library) – need to include in parameters table the correct local mapping to holdings (e.g. SWAN uses 999, RSA uses 949, CCS/Pinnacle use 902)
 - b. Filter as needed passed on parameters table (e.g. exclude 945 “OCLC do not set”, format, shadowed settings, non-OCLC libraries)
3. Project X processes:
 - a. Test 001/035 for OCLC number match (ocm, ocn, on); incorporate 003
 - b. Generate list of holdings (1 item holding per line)
 - i. OCLC# | Library Code (local)
 - ii. Dedupe multiple copies/same library
 - c. Send through Translation Table (one table per participating LLSAP)
 - i. OCLC# | OCLC Symbol
 - ii. If no translation table match, produce error report
 - d. Comparison with previous generation (X compared to X-1)
 - i. Foreach \$line (X)
 - if X-1 contains \$line
 - {ignore} /*holdings already set */
 - if X-1 ~contains \$line
 - {add} /*represents new item */
 - write file LLSAP_Add_Date
 - Foreach \$line (X-1)

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if X ~contains $line
  {delete} /*represents delete */
write file LLSAP_Delete_Date
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4. Process with OCLC

Questions for OCLC:

- Do we need an add and delete file for each library?
- How do we submit files automatically to OCLC (via email or upload for Collection Manager processing)?
- If we use Collection Manager does that need to be individual or consortium-wide?
- How are our collective holdings in Illinois scoped to the statewide catalog?
- What reports are available for each consortium after processing at OCLC? Can consortium have access to the fallout records directly, rather than those being sent to the CMC (Illinois Cataloging Maintenance Center – IHLS)?

Questions for LLSAPs:

- The simplified approach to Project X would produce only holdings and no reports (it could provide counts of add/deletes per library) – would this be acceptable?
- Does anyone see problems with creating the MARC export as outlined? Should we share an extract of 10 titles from each of our systems to review MARC.
- How often do you expect to run this process, assuming we can get to a point of minimal intervention? [Monthly]

Questions for TMQ?

- Why are holdings unable to be deleted during TMQ processing if they were manually updated in OCLC Connexion and deleted from the local database?
- Why isn't the current process able to update holdings for a catalog key that is initially assigned one OCLC title control number but is later edited to another OCLC number in our database?
- We know each exported bib record has its local system catalog key in the output. What is the purpose of including the catalog key? Is it to ensure, that if we loaded a corrected bib record from TMQ, it would replace our existing record assigned that same catalog key?
- Does TMQ process each LLSAP's files individually, or do they consolidate all LLSAP files into a single file that is then sent to OCLC?
- Does TMQ do "near match" holding updates if the LLSAP records lack OCLC numbers but do match OCLC records based on title, author, publication, pagination, etc.?

- Are we missing vital steps in this process that you would recommend us to consider? Again, our goal is to produce a "good-enough" process to maintain OCLC holdings.
- Any observations from years of working with IL consortia and recommendations for data clean-up or practice improvements prior to starting this process?
- What OS/programming language is OSMOSIS written in and do you have any recommendations?