OCLC WorldShare™ Management Services
Data Migration Overview

Table of Contents

A. Data Migration Process ........................................................................................................................... 2
B. Objectives ................................................................................................................................................ 2
C. Project Description .................................................................................................................................. 2
D. Risks, Constraints, and Dependencies ...................................................................................................... 3
E. Project Management ................................................................................................................................ 5
A. Data Migration Process

A data migration project consists of these steps:

1. The project will begin with an evaluation of the library’s description of their data as explained in the Data Migration Questionnaire submitted by the library to OCLC.

2. The data migration liaison will follow up with questions as needed.

3. From this information, it will be determined whether or not a bibliographic batchload project is needed, and if so, what type. It will also be determined how Local Holdings Records will be created/loaded as a second step.

4. Patron data will be requested toward the end of the project, followed by circulation transactional data, if desired.

The Scope Statement, to be delivered after data evaluation, will serve as the detailed plan for this project.

B. Objectives

In order to fully utilize OCLC WorldShare Management Services, the OCLC Member must migrate their bibliographic records, holdings, and patron data from their current Integrated Library System (“ILS”). It may also be desirable to migrate certain circulation transactional data, such as items checked out, holds, fines and fees, and historical statistical data, such as total checkouts, YTD checkouts, and date of last use. The loading of circulation data is optional.

When data migration is complete, the library’s instance of WMS will be ready for configuration and data validation.

C. Project Description

This project includes:

Batchload Project(s)

The first step of data migration is to ensure that holdings are properly set in WorldCat. To this end, OCLC will request that you send all bibliographic records that you wish to migrate to Batch Services. For more information about batchload projects, see http://www.oclc.org/us/en/support/documentation/batchprocessing/default.htm.

Your OCLC data migration liaison will order the appropriate batchload project(s) on your behalf. This will be determined from your answers on the Data Migration Questionnaire. You will receive one or multiple project IDs via email, along with instructions for submitting your bibliographic records. For more information about sending your records, see http://www.oclc.org/us/en/support/documentation/batchprocessing/using/FTPinstructions.pdf.

Data Evaluation

Upon receipt of your records, an OCLC data specialist will be assigned to your batchload project(s) and will evaluate your data. Upon completion of this evaluation process, your OCLC data migration liaison will complete a Scope Statement and return it to you for approval. Once your data migration liaison receives your approval to continue, the batchload project is initiated.

Local Holdings Records Creation/Load

Once holdings are set, Local Holdings Records (“LHRs”) are created. This may happen in conjunction with the setting of holdings or before holdings are set, depending on your ILS.
Details involving your particular project will be delivered in the Scope Statement. After LHRs have been loaded into WorldCat, WMS circulation item records are created and loaded.

**Patron Data Load**
Patron files can be sent in either tab-delimited or xml format. Templates for both formats and instructions can be found in the WMS User Support Center documentation: [https://www.oclc.org/support/webscale/documentation/data-migration/send-patron-data](https://www.oclc.org/support/webscale/documentation/data-migration/send-patron-data).

It is important to follow the template exactly. Headers must be the same and in the same order as the template. Dates must be in the format illustrated in the template. Gender, if included, must be in the format illustrated in the template. If a field is not to be included, it should be left blank and not deleted. Required fields are indicated in the tab-delimited template in red. If using the tab-delimited template, be sure to “Save As” a tab-delimited text and not an xls file.

At this time, there is no option for editing the patron expiration date from the WMS User Interface. Make your expiration dates one or two years to avoid having patrons expire until the functionality is provided in a future release. Should a patron’s expiration date expire, you will be asked to send that patron in an updated patron file to re-activate.

Send patron data to the secure FTP site using your VData account. Your data migration liaison will provide your password. For more information about sending files via your VData account, see [https://www.oclc.org/support/webscale/documentation/data-migration/set-your-vdata-secure-ftp-account](https://www.oclc.org/support/webscale/documentation/data-migration/set-your-vdata-secure-ftp-account).

**Circulation Data Load**
The loading of circulation transactional data is optional. Should you choose to load circulation data, the following is a guide to what data we are able to load, along with the required data elements for each type of data. Send each type of data in a separate tab-delimited file:

- Items checked out – patron barcode, item barcode, date checked out (YYYY-MM-DD), due date (YYYY-MM-DD), current location (if multi-branch institution)
- Fines/Fees – patron barcode, amount outstanding, fine amount, date of fine (YYYY-MM-DD), item barcode (optional)
- Holds – patron barcode, OCLC number, hold date (YYYY-MM-DD), hold expiration date (YYYY-MM-DD), order of priority (if there are multiple holds on a single OCLC number)
- Total checkouts – item barcode, total checkouts
- YTD checkouts – item barcode, YTD checkouts
- Date of last activity – item barcode, date of last activity (YYYY-MM-DD)

**Acquisitions Data Load**
At this time, OCLC does not migrate Acquisitions data.

**D. Risks, Constraints, and Dependencies**

**Risk Assessment**
Some data may not migrate exactly as it appeared in the previous ILS. This is due to differences in how data tables are structured from one ILS to the next. If the current ILS has the following components, include them in the translation table so that the data can be appropriately mapped:

- Item types are not a component of WMS. Item types will need to be mapped to WMS shelving locations if circulation policy is to be built around them.
- WMS allows only one type of shelving location. If the current ILS has more than one location (home location, current location, temporary location, etc.) this will need to be accounted for in the translation table.
- Be aware that if you have multiple reserve items that circulate for different periods of time, you will need to create a shelving location for each type of reserve, so that a unique circulation policy may be applied to each of them.

Patron groups are not a component of WMS. Patrons may only be a member of a single patron type. Provide instructions for how to determine which patron type to assign if the current ILS allows for multiple patron types for a single patron.

**Constraints**

During the data migration, you will be asked to keep your holdings up to date in WorldCat using Connexion. From the time you send your bibliographic records, "new" items may continue to be added to WorldCat via Connexion. Do not add additional copies of an item already owned ("adds") as there is a danger that the Local Holdings Records created in the process might be overwritten during the load process.

There will be a period of approximately 5-7 days when you will be asked to cease all cataloging until further notice while final data loads occur.

FAILURE TO CEASE CATALOGING MAY RESULT IN ITEMS BECOMING OUT OF SYNC WITH THEIR CORRESPONDING LOCAL HOLDINGS RECORD. THIS CAN TYPICALLY BE REMEDIED BY NAVIGATING TO THE LHR IN CONNEXION AND RESAVING THE RECORD.

**Dependencies**

Your data will be loaded in approximately the following order:

- Bibliographic records (holdings set in OCLC)
- Local Holdings Records
- WMS Item records
- Patron Accounts (can happen simultaneously with above, if preferred)
- Circulation Data

We ask that you maintain reports for patron/circ data that is added to your current ILS after you have sent the corresponding data file, and enter these manually when your instance of WMS is delivered to you. Because of this, we ask for your patron and circ data late in the process to minimize the amount of manual data entry required by your staff.
E. Project Management  

Communication Management  
The following strategies have been established to promote effective communication regarding this project:

The data migration liaison will provide a status report via email to the Project Lead as needed. The Project Lead will be notified via email on all urgent issues. Issue notification will include time constraints and impacts. Questions should be addressed during the bi-weekly data migration office hours, or via email at WMSImp@OCLC.org.

Data migration office hours are conducted via webex twice a week, on Tuesdays and Thursdays from 1:00 – 2:00 pm Eastern Time.

Webex information for data migration office hours

<table>
<thead>
<tr>
<th>Meeting information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topic: WMS Data Migration Office Hours</td>
</tr>
<tr>
<td>Date: Every Tuesday, Thursday</td>
</tr>
<tr>
<td>Time: 1:00 pm, Eastern Daylight Time (New York, GMT-04:00)</td>
</tr>
<tr>
<td>Meeting Number: 714 470 884</td>
</tr>
<tr>
<td>Meeting Password: (This meeting does not require a password.)</td>
</tr>
</tbody>
</table>

To start or join the online meeting  
Go to https://oclc.webex.com/oclc/j.php?ED=159489962&UID=490333782&RT=MiMxMQ%3D%3D

Issue Management  
Project-related issues will be tracked, prioritized, assigned, resolved, and communicated within the data migration team.

Issue descriptions, owners, resolution and status will be maintained in the Data Migration SharePoint site and reported to the Project Lead via email as necessary.

Change Management  
Should you request a change to the scope of your WMS data migration project, the follow procedures will occur:

- Data migration Change Requests will be assessed to determine the impact on the project related to the Implementation level quoted for the project and communicated to the Project Lead.

- All Change Requests must be reviewed and approved by the Project Lead.

- The effects of approved Change Requests on the scope and schedule of the project will be reflected in updates to the Scope Statement.

- Should the amount of time needed to migrate your institution's data exceed that specified in the Scope Statement, OCLC will provide an addendum that details the additional time required to complete your institution's data migration activities. OCLC will attempt to communicate foreseeable possible overages as soon as possible.