Find information about data sync processing, including holdings translation tables, record validation, sparse records, and unresolved records.

Note: During the validation process:

- Hyphens are interpreted as spaces
- Accents and other diacritical marks are replaced by letters without diacritical marks

## Holdings translation tables

You will need to create a holdings translation table after you create any of the following collections:

- Local holdings records
- Delete local holdings records

The table is used during processing to map your local location codes to an OCLC institution symbol in 852 subfield $a; a 4-character OCLC-profiled holding library code in 852 $b; and, in some cases, an 852 $c of the WorldCat LHRs. It can also be used to set the lending (008/20) and reproduction (008/21) policy bytes of the 008 field.

After you create one of the above collections and submit your data, a database specialist will contact you to begin the holdings translation table creation process. They will provide you with a pre-populated workbook with the incoming values on the left-hand side and the 852 $a on the right-hand side. You will need to complete the remaining right-hand columns.

### Example - Holdings translation table

<table>
<thead>
<tr>
<th>INCOMING DATA</th>
<th>WORLDCAT LHRs</th>
</tr>
</thead>
<tbody>
<tr>
<td>852 $a 852 $b 852 $c</td>
<td>852 $a 852 $b 852 $c (OPTIONAL) 008/20 (OPTIONAL) 008/21 (OPTIONAL)</td>
</tr>
<tr>
<td>OCWMS UMSCI URF</td>
<td>OCWMS</td>
</tr>
<tr>
<td>OCWMS UMSCA UDMF</td>
<td>OCWMS</td>
</tr>
<tr>
<td>OCWMS UMMDA UDMF</td>
<td>OCWMS</td>
</tr>
<tr>
<td>OCWMS UMDUB USTOL</td>
<td>OCWMS</td>
</tr>
<tr>
<td>OCWMS FCDPT UDF</td>
<td>OCWMS</td>
</tr>
</tbody>
</table>
How to Enter Free Form Text

Create a holdings translation table

1. Enter your **local location code** that will map to 852 $a of the LHRs in the 852 $a column.
2. Enter a **valid 4-character holding code** that will map to 852 $b of the LHRs in the 852 $b column. Note: A list of your holding library codes is included on the second sheet of the workbook.
3. Enter **852 $c values** you would like added to your LHRs in the 852 $c column. Note: This column is required for libraries migrating to WMS for any barcoded, circulating items. It is optional for traditional LHR collections.
4. If you would like to set the 008/20 and 008/21 values via the holdings translation table, enter those values in the **008/20 and 008/21 columns**. Note: Bytes 20 and 21 of the 008 field can override your Policies Directory as outlined below:
   - **Lending Policy (008 byte 20)** - will **override** Policies Directory Profiles
     - a - Will lend
     - b - Will not lend
     - c - Will lend hard copy only
     - Settings that will **defer** to Policies Directory Profiles
       - l - limited lending policy
       - u - unknown
   - **Reproduction Policy (008 byte 21)** - will **override** Policies Directory Profiles
     - a - Will reproduce
     - b - Will not reproduce
     - Settings that will **defer** to Policies Directory Profiles
       - u - unknown
5. Return the completed holdings translation table worksheet to your database specialist.

Record validation and validation error levels

Bibliographic and local holdings records received for processing through data sync are subject to record validation to assess the validity of the coding and data in the record. This is the same validation process used in Connexion and Record Manager for checking fixed field elements, variable tags, indicators, and subfields.

In data sync processing, many validation errors are corrected globally before validation processing. Those remaining errors that are detected by validation are used to set a validation error level (VEL) for the entire record based on an assessment of the severity of errors.
<table>
<thead>
<tr>
<th>ELEMENT TYPE</th>
<th>ERROR TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed field</td>
<td>Validity</td>
<td>Returns an error if a code is not valid for a given fixed field element</td>
</tr>
<tr>
<td></td>
<td>Repeatability</td>
<td>Returns an error if a code is repeated in a fixed field element which can contain multiple codes</td>
</tr>
<tr>
<td></td>
<td>Space</td>
<td>Returns an error if spaces separate codes in a fixed field element which can contain multiple codes</td>
</tr>
<tr>
<td></td>
<td>Relationship</td>
<td>Returns an error if a code exists in combination with or without another specified element in the fixed field or elsewhere in the record</td>
</tr>
<tr>
<td>Tag</td>
<td>Validity</td>
<td>Returns an error if a tag is not valid</td>
</tr>
<tr>
<td></td>
<td>Repeatability</td>
<td>Returns an error if a field occurs too few or too many times</td>
</tr>
<tr>
<td></td>
<td>Length</td>
<td>Returns an error if a field is too short or too long</td>
</tr>
<tr>
<td></td>
<td>Relationship</td>
<td>Returns an error if a tag exists in combination with or without another specified element in the same field or elsewhere in the record</td>
</tr>
<tr>
<td>Indicator</td>
<td>Validity</td>
<td>Returns an error if an indicator value is not valid for an indicator position in a given field</td>
</tr>
<tr>
<td></td>
<td>Relationship</td>
<td>Returns an error if an indicator value exists in combination with or without another specified element in the same field or elsewhere in the record</td>
</tr>
<tr>
<td>Subfield</td>
<td>Validity</td>
<td>Returns an error if a subfield code is not valid for a given field</td>
</tr>
<tr>
<td></td>
<td>Data</td>
<td>Returns an error if the type of data in a subfield is not valid for that subfield</td>
</tr>
<tr>
<td></td>
<td>Repeatability</td>
<td>Returns an error if a subfield occurs too few or too many times</td>
</tr>
<tr>
<td></td>
<td>Length</td>
<td>Returns an error if a subfield is too short or too long</td>
</tr>
<tr>
<td></td>
<td>Relationship</td>
<td>Returns an error if a subfield exists in combination with or without another specified element in the same field or elsewhere in the record</td>
</tr>
<tr>
<td>All</td>
<td>Special</td>
<td>Special checks are made for record structure, data format, check characters, duplicate fields, etc.</td>
</tr>
</tbody>
</table>
Validation error levels

The validation error level assigned to a record is determined by a combination of element type and error type. Validation error levels are 0 (None), 1 (Minor), 2 (Severe), and 3 (Critical) in order of least to most severe.

- Error Level 0 — No coding errors detected
- Error Level 1 — Minor coding error. Errors that have no significant impact to effective use of the record. Correction is optional.
- Error Level 2 — Severe coding error. Errors that significantly impact effective use of the record; further investigation and probable correction required.
- Error Level 3 — Critical coding error. The most severe errors; records cannot be loaded.

Error levels 2 and 3 will cause an unresolved bibliographic record to be added to the database as an unresolved record requiring further review and action.

<table>
<thead>
<tr>
<th>ERROR LEVEL</th>
<th>ERROR</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Not applicable/no coding errors detected</td>
</tr>
<tr>
<td>1</td>
<td>All validation errors not outlined in levels 2 and 3</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in all elements except Rec stat (Leader/05), Type (Leader/06), BLvl (Leader/07), and Desc (Leader/18)</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Relationships — Type (Leader/06) and BLvl (Leader/07) except invalid combinations of codes in Type and BLvl</td>
</tr>
<tr>
<td>2</td>
<td>Tag/Validity — All variable fields</td>
</tr>
<tr>
<td>2</td>
<td>Tag/Repeatability — Fields 010 and 245</td>
</tr>
<tr>
<td>2</td>
<td>Indicator/Validity — All variable fields</td>
</tr>
<tr>
<td>2</td>
<td>Subfield/Validity — All variable fields</td>
</tr>
<tr>
<td>2</td>
<td>Subfield/Data — Invalid code in field 042</td>
</tr>
<tr>
<td>2</td>
<td>Subfield/Data — Invalid characters</td>
</tr>
<tr>
<td>2</td>
<td>Subfield/Repeatability — Field 245 $a occurs too many times</td>
</tr>
<tr>
<td>2</td>
<td>Subfield/Repeatability — Field 245 $b occurs too many times</td>
</tr>
<tr>
<td>ERROR LEVEL</td>
<td>ERROR</td>
</tr>
<tr>
<td>------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>3</td>
<td>Fixed field/Validity — Invalid code in Rec stat (Leader/05)</td>
</tr>
<tr>
<td>3</td>
<td>Fixed field/Validity — Invalid code in Type (Leader/06)</td>
</tr>
<tr>
<td>3</td>
<td>Fixed field/Validity — Invalid code in BLvl (Leader/07)</td>
</tr>
<tr>
<td>3</td>
<td>Fixed field/Relationship — Invalid combinations of codes in Type (Leader/06) and BLvl (Leader/07)</td>
</tr>
<tr>
<td>3</td>
<td>Fixed field/Special — Invalid data in Entered (008/00-05)</td>
</tr>
<tr>
<td>3</td>
<td>Tag/Length — Field 008 too short</td>
</tr>
<tr>
<td>3</td>
<td>Tag/Relationship — Field 040 $c must exist</td>
</tr>
<tr>
<td>3</td>
<td>Tag/Relationship — Field 245 $$a or $k must exist</td>
</tr>
<tr>
<td>3</td>
<td>Tag/Special — Field 008, 040, and/or 245 missing</td>
</tr>
<tr>
<td>3</td>
<td>Any $6 errors</td>
</tr>
<tr>
<td>3</td>
<td>Any other errors which do not allow the validation process to complete normally</td>
</tr>
</tbody>
</table>

### Validation error levels and errors for local holdings records - Table

<table>
<thead>
<tr>
<th>ERROR LEVEL</th>
<th>ERROR</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>Not applicable/no coding errors detected</td>
</tr>
<tr>
<td>1</td>
<td>All validation errors not outlined in levels 2 and 3</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in Rec stat (Leader/05)</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in Type (Leader/06)</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in 007/00 and/or 007/01</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in Acq stat (008/06)</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in Lend pol (008/20)</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in Repr pol (008/21)</td>
</tr>
<tr>
<td>ERROR LEVEL</td>
<td>ERROR</td>
</tr>
<tr>
<td>-------------</td>
<td>-------</td>
</tr>
<tr>
<td>2</td>
<td>Fixed field/Validity — Invalid code in Lang (008/22-24)</td>
</tr>
<tr>
<td>2</td>
<td>Tag/Repeatability — All variable fields except 852</td>
</tr>
<tr>
<td>2</td>
<td>Tag/Length — Field 008 too short or too long</td>
</tr>
<tr>
<td>2</td>
<td>Tag/Relationship — All variable fields</td>
</tr>
<tr>
<td>2</td>
<td>Tag/Special — All duplicate variable fields</td>
</tr>
<tr>
<td>2</td>
<td>Indicator/Validity — All variable fields</td>
</tr>
<tr>
<td>2</td>
<td>Subfield — Any field 852 $b errors</td>
</tr>
<tr>
<td>2</td>
<td>Subfield — Any subfield errors in 853, 854, 855, 863, 864, 865, 866, 867, 868, 876, 877, and/or 878</td>
</tr>
<tr>
<td>2</td>
<td>Subfield/Data — All subfields</td>
</tr>
<tr>
<td>2</td>
<td>Subfield/Repeatability — All subfields</td>
</tr>
<tr>
<td>3</td>
<td>Tag — Any field 004 errors</td>
</tr>
<tr>
<td>3</td>
<td>Tag/Length — Leader too short or too long</td>
</tr>
<tr>
<td>3</td>
<td>Tag/Repeatability — Field 852 occurs too many times</td>
</tr>
<tr>
<td>3</td>
<td>Tag/Special — Field 004, 007, 008, and/or 852 missing</td>
</tr>
<tr>
<td>3</td>
<td>Subfield — Any field 852 $a errors</td>
</tr>
<tr>
<td>3</td>
<td>Any other errors which do not allow the validation process to complete normally</td>
</tr>
</tbody>
</table>

**Sparse records**

Sparse records are bibliographic records that lack sufficient data to identify a manifestation of an item. When sparse records match to a single existing WorldCat record, they are used to set or cancel holdings. Unmatched sparse records are added to WorldCat Staging (unindexed) and are not used to replace existing WorldCat records.

**Example**

A record for the book *Dombey and Son* by Charles Dickens only has the title and author's name. It does not identify the
precise manifestation of the book by publisher, date of publication, language, format (for example, Braille or large print), editor, standard number, and other data that would distinguish the particular manifestation of *Dombey and Son*. Instead of matching to one of the over 1800 records in WorldCat for *Dombey and Son*, sparse records are set aside as unresolved records.

**Sparse record criteria**

In all cases, the Leader, 008 field, and a title (245 $a or 245 $k) must be present. In addition to those mandatory elements, other elements as noted below must be present. The following table is used to determine if a record is a sparse record. Records are checked based on the value in Type, BLvl, and Form elements to see if certain fields or subfields are present. If the criteria is met, the record is considered to be **Not Sparse**. Otherwise the record is considered **Sparse**.

**Criteria used to determine if a record is sparse - Table**

The following codes must be present:

- **Type** refers to Leader/06
  Note: Type (Leader/06) must contain a valid value: a, c, d, e, f, g, i, j, k, m, o, p, r, or t

- **BLvl** refers to Leader/07
  Note: BLvl (Leader/07) must contain a valid value: a, b, c, d, i, m, or s

- **TMat** refers to 008/33 (when Type is coded g, k, o, or r)

- **Form** refers to 008/23 (when Type is coded a, c, d, i, j, m, p, or t)
  Note: Form (008/23) must contain a valid value: blank, a, b, c, d, f, o, q, r, or s

- **Form** refers to 008/29 (when Type is coded e, f, g, k, o, or r)
  Note: Form (008/29) must contain a valid value: blank, a, b, c, d, f, o, q, r, or s

Note: N/A = Code(s) not applicable

<table>
<thead>
<tr>
<th>TYPE</th>
<th>BLVL</th>
<th>FORM MUST CONTAIN ONE OF THE FOLLOWING VALID VALUES</th>
<th>AT LEAST ONE OF THESE MUST BE PRESENT</th>
<th>AT LEAST ONE OF THESE MUST ALSO BE PRESENT</th>
<th>INDICATOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>a or c</td>
<td>c, d, or m</td>
<td>blank, a, b, c, d, f, o, q, r, or s</td>
<td>020/a</td>
<td>260/a or b</td>
<td>Not sparse</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>024/a</td>
<td>264/b</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>027/a</td>
<td>533/c</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>028/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>088/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>100/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TYPE</td>
<td>BLVL</td>
<td>FORM MUST CONTAIN ONE OF THE FOLLOWING VALID VALUES</td>
<td>AT LEAST ONE OF THESE MUST BE PRESENT</td>
<td>AT LEAST ONE OF THESE MUST ALSO BE PRESENT</td>
<td>INDICATOR</td>
</tr>
<tr>
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<td>---------------------------------------------------</td>
<td>----------------------------------------</td>
<td>-------------------------------------------</td>
<td>-----------</td>
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<tr>
<td></td>
<td></td>
<td>110/a</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>111/a</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>300/a</td>
<td></td>
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<td></td>
<td></td>
<td>533/a</td>
<td></td>
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<td></td>
<td></td>
<td>700/a</td>
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<td></td>
<td></td>
<td>710/a</td>
<td></td>
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<td></td>
<td></td>
<td>711/a</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>800/a</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>810/a</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>811/a</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>830/a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>260/a or b</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>a or c</td>
<td>i or s</td>
<td>blank, a, b, c, d, f, o, q, r, or s</td>
<td>264/b</td>
<td>N/A</td>
<td>Not sparse</td>
</tr>
<tr>
<td></td>
<td></td>
<td>533/c</td>
<td></td>
<td></td>
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<td></td>
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<td>020/a</td>
<td></td>
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<td></td>
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<td>024/a</td>
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<td></td>
<td></td>
<td>027/a</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>028/a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d or t</td>
<td>c, d, or m</td>
<td>blank, a, b, c, d, f, o, q, r, or s</td>
<td>088/a</td>
<td>N/A</td>
<td>Not sparse</td>
</tr>
<tr>
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<td></td>
<td>100/a</td>
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<td>110/a</td>
<td></td>
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<td>111/a</td>
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<td>300/a or f</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TYPE</td>
<td>BLVL</td>
<td>FORM MUST CONTAIN ONE OF THE FOLLOWING VALID VALUES</td>
<td>AT LEAST ONE OF THESE MUST BE PRESENT</td>
<td>AT LEAST ONE OF THESE MUST ALSO BE PRESENT</td>
<td>INDICATOR</td>
</tr>
<tr>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>533/e</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>700/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>710/a</td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td>711/a</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>800/a</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>810/a</td>
<td></td>
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<td></td>
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<td>811/a</td>
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<td></td>
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<td></td>
<td>830/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e</td>
<td>c, d, i, m, or s</td>
<td>blank, a, b, c, d, f, o, q, r, or s</td>
<td>007/00 = a, d, or r</td>
<td>260/a or b</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>300/a</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>338/a or b</td>
<td>264/b</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>533/e</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>533/c</td>
<td>Not sparse</td>
</tr>
<tr>
<td>f</td>
<td>c, d, or m</td>
<td>blank, a, b, c, d, f, o, q, r, or s</td>
<td>007/00 = a, d, or r</td>
<td>N/A</td>
<td>Not sparse</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>300/a or f</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
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Transfer of bibliographic data

The transfer of selected bibliographic data may occur after bibliographic record matching has identified appropriate candidate records and record resolution has selected the best record for retention in the WorldCat database. Selected fields that are candidates for being transferred from the Replace records are copied into the Retain record. Software performs field-by-field transfers according to strict and complex rules based upon factors including but not limited to presence or absence in the Retain record, certain indicator and/or subfield $2$ values, relationships with other fields, tests of uniqueness, and repeatability. Following the transfer of any bibliographic data, the Retain record is put back into WorldCat as the master record.
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Unresolved records

Unresolved records are records that do not match a record in WorldCat. They are added to WorldCat Staging, a partially indexed area of WorldCat. Unresolved records can only be found using the OCLC number provided in the Unresolved Cross Reference file.

Unresolved bibliographic records

A record may be considered unresolved due to the following reasons:

- The record did not match a WorldCat record because of:
  - Legitimate differences in cataloging practice.
  - Data errors that prevented bibliographic matching algorithms from identifying the record as matching a WorldCat record.
  - A matching record does not already exist in WorldCat.
- The record was added to WorldCat Staging because of:
  - MARC validation errors (e.g., non-repeatable fields are repeated, indicator values are missing or erroneous, or other validation errors occurred).
  - Sparse or incomplete records: Records that do not have enough data to be considered even a brief bibliographic record. Often, these are order records that were not deselected during the evaluation process.
  - No matching record was identified and the collection was set to limit added records to WorldCat Staging.

Managing unresolved bibliographic records

You can manage unresolved bibliographic records in one of the following ways:

- Do nothing with the records
  - Records will be deleted automatically 180 days after their initial processing.
  - If records must be deleted sooner than 180 days, you will need to submit a list of OCLC numbers for the records to be deleted to bibchange@oclc.org.
- Use existing record(s) from WorldCat
  - Delete holdings from unresolved record(s).
  - Records with no holdings will be removed regularly.
- Delete holdings from unresolved record(s)
• Correct and resend the record to your data sync collection in a later file of records

For more detailed information on processing unresolved records in WorldCat Staging, see Process records in WorldCat Staging.

Unresolved local holding records (LHRs)

**Error Level 1** - An error level 1 record contains minor errors that do not have an impact on the user of the record. The record will be loaded to WorldCat and will not be corrected by OCLC. Any data correction should be done by the providing institution.

**Error Level 2** - An error level 2 record contains errors that prevent the record from indexing properly. The record will be loaded to WorldCat and OCLC will attempt to correct the record. At the end of this processing, some level 2 errors may remain. Any remaining data correction should be done by the providing institution.

**Error Level 3** - An error level 3 record contains severe errors that prevent the record from being loaded to WorldCat. OCLC will not attempt to correct the record and any data correction needs to be resolved by the providing institution.

Managing unresolved LHR records

You can manage unresolved LHR records in one of the following ways:

• Do nothing with the records:
  ◦ Error level 3 records have not been loaded to WorldCat and Level 1 records have been loaded with minor errors.
  ◦ We do recommend, for quality and indexing, that any remaining Error Level 2 records be updated.

• Use Connexion or Record Manager to correct or add the LHR.

• Delete the LHR from WorldCat.

• Correct and resend the record to your data sync collection in a later file.