Jisc NBK contributors:

Data supply workflow

Updated: 23 August 2019

Introduction

This document provides a summary overview of what is involved in a new contributor supplying data to the NBK and how we will support you in this process. If you have any questions about any aspect of the process please get in touch with us at: **nbk@jisc.ac.uk**

We welcome feedback about the documentation and processes.

1. Initial preparation

You need to do:	We will do:
» Provide us with a technical contact – one or more people we will be working with to set up your data supply. Send to: **nbk@jisc.ac.uk**	» Provide details of how to access the NBK Contributor Dashboard via Shibboleth. » If required, provide a single Dashboard login via the Copac Identify Provider. This gives you interim access to the Dashboard whilst you amend your local Shibboleth settings to provide local access control.
» Consider locally the preparations you need to make. Look at the documentation available on the Contributor Website. Access this at: **https://contribute.copac.jisc.ac.uk/**	
» If you have any questions or concerns, contact our Contributor Support: **nbk@jisc.ac.uk**	» Answer any questions you may have regarding preparing for the data supply.

2. Preparation: Server access & data transfer information

You need to do:	We will do:
» Add NBK Contributor Dashboard access credentials to your local Shibboleth.	» Provide support to ensure you can access the Dashboard

On the Dashboard:	» Confirm that we have received your questionnaires, answering any questions you have included.
» Fill in the Data Supply questionnaire and submit this once it is complete: https://contribute.copac.jisc.ac.uk/dashboard/questionnaires/data-supply/	» Give you access to our server for data supply.
	» Let you know when & how you can access the server.
» Fill in the Data Management questionnaire and submit this once it is complete: https://contribute.copac.jisc.ac.uk/dashboard/questionnaires/data-management/	» Use the information in the questionnaires to establish the data processing for your catalogue.
	» Confirm when we are ready for you to send your data.

3. Preparation: Supply circulation data and Library information

You need to do:	We will do:
Once you have submitted your Data Supply and Data Management questionnaires: On the Dashboard:	If you can supply circulation data via Z39.50, we will:
» Fill in the Circulation data questionnaire and submit this once it is complete: https://contribute.copac.jisc.ac.uk/dashboard/questionnaires/circulation-data/	» Test the Z39.50 link for live circulation data » Incorporate this into the NBK once your data is loaded.
On the Dashboard:	» Create a Library Information page for your library on Discover.
» Fill in the Library Information questionnaire and submit this once it is complete: https://contribute.copac.jisc.ac.uk/dashboard/questionnaires/library-info/	» Add your special collections (or other) contact to our contributor mailing list and get in touch to discuss featuring your collections on the NBK blog.

4. Data transfer

You need to do:	We will do:
In the period agreed for you to send your data: » SFTP a copy of your local catalogue including all records you would display on your local catalogue. » If the data supply is likely to be delayed please let us know at: **nbk@jisc.ac.uk** » Check the Contributor Dashboard to see if your files have transferred successfully	Once we have looked at your data: » If we have queries we will contact you about these. » Otherwise we will process and load the data as soon as we have staff and system time available. » We will be in touch to let you know when your catalogue has been loaded onto Discover and Compare.

5. Update supply

You need to do:	We will do:
» Once the initial catalogue transfer is complete, test how you plan to supply updates. Note the file naming conventions: **https://contribute.copac.jisc.ac.uk/dashboard/ file-naming-conventions.html** » Once we have confirmed your load is underway, send your first updates (new, amended, deleted records) » Start sending updates at the agreed frequency. Normally weekly. An email confirmation can be useful to: **nbk@jisc.ac.uk** » If there are likely to be changes to your updates please let us know eg: - Delays in sending updates - Very large updates	» We will confirm that your first updates have been applied successfully. » We will process and load regular updates. » We will respond to any questions you may have regarding your updates.

| Contact the Contributor helpdesk:
nbk@jisc.ac.uk | |

6. Keep in touch

You need to do:	**We will do:**
Tell us about any local changes that affect the data, the data supply process, or your library information page on the NBK, eg: » Library name changes » Z39.50 server changes » Library system move: a change of library system normally means a change of record numbers so we will need a full catalogue reload. Please give us advance warning.	» Amend details on the NBK to ensure the data and the Library Information page are correct. » Work with you to reload your data following a change of library system.