



Create a WorldCat data sync collection

Introduction and instructions for Texas libraries

A data sync collection matches records from your local catalog with records in WorldCat and manages holdings on those matching records. These holdings may be at the institution-level, such as your OCLC symbol or at the local-level, such as Local Holdings Records (LHRs).

Use this checklist to gather the information you will need to create a WorldCat data sync collection in WorldShare Collection Manager. Each panel opens separately. This document lists the topmost questions from all the panels.

Log on to WorldShare Collection Manager

The first step is to obtain your WorldShare Collection Manager account

Complete the request form at this link to begin the process.

Include the information, Texas Navigator library, in the Comments box on this form

<http://www.oclc.org/content/forms/worldwide/en/wckb-request.html>

You will receive a Welcome email that contains:

Your institution's WorldShare custom web address: <https://YOURLIBRARY.share.worldcat.org/wms>

Your Username: _____ and Information on how to establish a password

Authorization number for reports: (9-digit number)

If you have questions about this information or about the sign in process, please contact OCLC Support. Contact information is provided at the end of this document.

Review Collection Manager Institution Level Settings

Once you are in WorldShare, Click Metadata, then Collection Manager to open the left panel. Click **Institution Settings** to open these options.

1. Click **OCLC Symbol** to open the panel.
 - a. Verify that your institution's OCLC symbol is selected.
 - b. If your OCLC symbol is not selected, click the radio button next to your symbol to select it.
2. Click **Reports** to open the panel.
 - a. To **Receive Email Reports**, click Yes
 - b. In **Authorization Code**, enter the 9-digit authorization number _____
3. Open **Data Sync Reports** and select the reports you want to receive:
 - a. Bibliographic Record Processing
 - b. Bibliographic Record Processing exceptions
4. In **Email Address (es)**, enter one or more email addresses to receive reports.
5. Click **Save** to store the selections.

Create a Collection

1. Click **Create a Collection**.
2. Select **Data Sync Collection** from the Collection Type drop-down menu.
3. Select a collection type from the **Data Sync Type** drop-down menu:
 - Bibliographic
 - Delete WorldCat Holdings

Note: If a data sync collection of the same type exists, you will see a warning. *A WorldCat data sync collection of this same type already exists. We recommend using this existing collection; however, you can create a second collection of the same type.*

Follow these steps to search for a data sync collection:

1. Open Collection Manager
2. Choose data sync collection from the Collection drop down list
3. Click Search to display these existing collections
4. Click the Collection Name to open this collection to complete it or review the specifications.

Enter the requested information under each panel. This information will be used by OCLC to process the records that you send. **Properties, Comments and Contact** panels apply to every collection

Create a bibliographic collection

Click **Properties** to open the panel.

Enter a **Collection Name:** _____

A collection name can be up to 100 characters and must be unique for an institution. Use the phrase, **Texas Navigator**, in your collection name to help identify your collections to OCLC staff.

Is this collection for a group: **No**

Group administrators: select Yes; complete the Group tab in Bibliographic record information

Is your institution a **WMS Library:** **No**

Third Party/Consortia Name: Enter, **Texas Navigator project**, in this space

Select the **Original Data Format:** **MARC or Non-MARC**

NOTE: If **Non-MARC** is selected, specify whether **Numeric search keys for holdings maintenance only** will be sent. **Yes or No**

OCLC accepts a .CSV or .TXT file with OCLC Numbers for this processing.

Use Record Status for Processing: **No**

This collection is for update holdings only; create a separate collection to **Delete WorldCat holdings**

Enter a **Description** for the collection. Add brief information about your data or the type of processing you want such as Reclamation. More information can be added under Comments.

Complete Bibliographic Record Information

Click **Bibliographic Record Information** to open the panel.

Complete **Initial Estimate of Record Count** field: _____

This information is used to verify receipt of all records in your first data file.

Update this information when subsequent data files are sent under this collection.

For **non-MARC** data, this is the only information needed in this panel.

For MARC data, complete the tabs below:

Complete the System tab

Enter your local system **Vendor** name: _____

Enter your local **System** Name: _____

Enter your local system **Version**: _____

Select the **OCLC Number Location(s)** in your records:

- 001
- 035 \$a
- Other: Field _____ Subfield _____
- None

Note: Enter the preferred location first in this list. If you only have multiple locations, use the add button (+) to create additional rows.

Select the **Local System Number Location(s)** in your records:

- 001
- 035 \$a
- 907 \$a
- Other: Field _____ Subfield _____
- None

Note: The unique local system number is required. These are stored at OCLC for use in creating Local Bibliographic Data for your institution. If you plan to re/load records back into your local system after processing, this number is a unique match point for this purpose.

Complete the Processing tab / verify and accept the default values presented here

Limit Added Records to WorldCat Staging: **No**

Replace Records in WorldCat: **No**

Use Language of Cataloging (040 \$b) Field from Records: **Yes**

NOTE: If you select **Yes**, the language of cataloging indicated by the three-character language code in the 040 \$b of your records is used. When no value is found, then English (eng) is assumed.

If your records do not contain a value in the 040 \$b and/or your records are cataloged in a language other than English, select **No** and select the language of cataloging from the **Default Language of Cataloging Code** drop-down menu.

Use **Excluded Information for Fixed Fields** to identify records to exclude from processing

Tags include: Leader – 006 – 007 – 008

Follow the screen prompts to enter additional information needed to use this for processing.

Identify the Condition from the list provided: _____

Enter the Value: _____

Action: Exclude any field(s) containing data OR Exclude any record(s) containing data

** Action varies based on Tag selected for the fixed field.

Use **Excluded Information for Variable Fields** to identify records to exclude from processing

Tag: _____ Indicator 1: _____ Indicator 2: _____ Subfields: _____

Condition: _____

Value: _____

Action: Exclude any field(s) containing data OR Exclude any record(s) containing data

Complete the Group tab (if applicable)

Select the OCLC symbol to use in field 040 \$a and \$c for new records; and, indicate the location of the Institution Identifiers in the records. The values in this location are used to build the translation table for processing to ensure that the correct holdings action is taken on the OCLC symbols represented in the records.

1. Symbol Used for Adding Records to WorldCat
 - OCLC group symbol is the default; OCLC recommends using this group symbol.
2. Institution Unique Identifier: with this selection, the first OCLC symbol found in a record is used to build the 040 \$a and \$c for new records.
3. Institution Unique Identifier Location:
Enter the Tag and subfield where the library identifiers representing libraries in the group are found in your records. This information is required (see Notes below for details).

Tag: _____ Subfield: _____

4. Note: Records must contain library identifiers for libraries in the group in a consistent location. Identifiers may be unique local codes (meaningful only to the libraries in the group), holding library codes, or the OCLC symbols for the libraries in the group.

5. Note: OCLC gathers the unique identifiers from this specified Tag/subfield and builds a table that “translates” these unique identifiers into corresponding OCLC institution symbols in order to set or cancel holdings accurately for each member of the group.

6. Group Bibliographic Translation Table status: Group administrator reviews and approves table values so processing can move forward for the group.

Complete Local Bibliographic Data Information

Click **Local Bibliographic Data Information** to open the panel.

Identify the Local Bibliographic Data (LBD) fields you want to retain and the corresponding source locations on your system. Select as many data fields as apply:

Tag: _____ Description: _____ Source Location: _____

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Note: OCLC stores local bibliographic data in WorldCat that will display in WorldCat Discovery interface. The data is **not** added to WorldCat bibliographic or local holdings records but it is accessible in **WorldShare Record Manager**. This is not in a **Delete WorldCat Holdings** collection.

Complete MARC Record Output Information (optional)

Click **MARC Record Output Information** to open the panel.

For **Enable MARC Record Delivery**, select: **Yes or No**

If **YES** is selected, next choose what **Records** should be returned:

- My Library Records (**preferred for Texas libraries**)

NOTE: This option returns your record with the OCLC number inserted in the field specified under Bibliographic Record Information panel. The default location is field 035 \$a.

Complete the Contacts panel

Add contact information for 2 or 3 individuals who know about your collection specifications and your data. List the primary contact first. Use the add button () to create rows for additional contacts.

Last Name: _____ First Name: _____ Phone: _____ Email: _____

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Note: OCLC is a global library cooperative operating in more than 100 countries with the headquarters located in the United States. For information on how this contact information is used by OCLC, see the Privacy Policy. <https://policies.oclc.org/en/privacy/privacy-statement.html>

Save and Submit the collection

When all panels are completed, click **Save** to store these selections. This step generates the **Collection ID**, a unique 7-digit number that is used in your filename to identify your collection.

This step also generates the **Comments** panel, where you can add information about your specifications or data to share with OCLC staff.

Open the **Collection Actions** menu and select **Submit collection to OCLC**. This step alerts OCLC staff that data is forthcoming. Once a collection is submitted, it can only be edited by OCLC staff.

Next Steps

Once the data sync collection is **Submitted**, prepare your data and send files to OCLC.

Prepare your data: talk with your local system administrator to output files of records or numeric search keys to send to OCLC for processing.

Details about naming files can be found at this [link](#)

In the filename, include:

- Collection ID
- Your OCLC symbol
- Description of data, such as update holdings
- File extension based on the type of data being sent, such as “.mrc” for MARC data or .csv for numeric search keys.

Send files to OCLC for processing

You may use the Metadata > My Files or the File exchange services to upload your files to OCLC.

Details about upload through Metadata > My Files is available [here](#)

Details about upload through the [file exchange server](#) is here

OCLC will process your data according to specifications in the data sync collections.

Retrieve output files and reports

Data sync collections reports include processing results for bibliographic records, WorldCat holdings updates, and local bibliographic data records as well as My Library Records.

Access these reports in Metadata > My Files > Downloads or through the file exchange server.

Find information about interpreting the report details [here](#).

Repeat these steps as needed to maintain up to date holdings in WorldCat.

Delete WorldCat Holdings Collection

Create a delete WorldCat holdings collection and submit MARC records or non-MARC numeric search keys for the purpose of removing your holdings from specific records in WorldCat.

The Delete WorldCat Holdings collection contains the Properties, Contacts and Comments panels along with the Bibliographic record information panel.

Click Properties to open the panel.

Enter a **Collection Name**: _____

A collection name can be up to 100 characters and must be unique for an institution. Use the phrase, **Texas Navigator**, in your collection name to help identify your collections to OCLC staff.

Is this collection for a group: **No**

Group administrators: select Yes; complete the Group tab in Bibliographic record information

Is your institution a **WMS Library**: **No**

Third Party/Consortia Name: Enter, **Texas Navigator project**, in this space

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Use Record Status for Processing: **No**

Enter a **Description** for the collection. Add brief information about your data or the type of processing you want such as Reclamation. More information can be added under Comments.

Click Bibliographic Record Information to open the panel.

Complete **Initial Estimate of Record Count** field: _____

This information is used by OCLC staff to verify receipt of all records in your first data file; update this information when subsequent data files are sent under this collection.

For **non-MARC** data, this is the only information needed in this panel.

Complete the **System tab** and the **Processing tab**

(optional) Complete the **Group** tab

Complete the Contacts panel

Add contact information for 2 or 3 individuals who know about your collection specifications and your data. List the primary contact first. Use the add button () to create rows for additional contacts.

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Support Resources

Documentation:

WorldShare Collection Manager: [Data sync collections](#).

How to [Upload and download files](#)

How to [Understand reports and output files](#)

Contact:

- **OCLC Customer Support:** <http://oc.lc/support>
 - 800-848-5800 or support@oclc.org (US)