



Create a WorldCat data sync collection

Introduction

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.

If more research must be done to complete the collection, use **Save Progress** to store your work in progress. When all the needed information is entered, use **Submit** to send your collection to OCLC.

Save Progress and Submit generate a unique 7-digit **Collection ID**. Use this to search for your saved collection and in the file name when sending files to OCLC for processing. Details about searching for your saved collection can be found [here](#); file naming and uploading details are [here](#).

After you complete the checklist, sign in to WorldShare® Collection Manager to create the collection (see logon details on [this page](#)).

NOTE: Each panel opens separately. This document lists the topmost questions from all the panels.

Log on to WorldShare Collection Manager

Use Collection Manager to create a data sync collection.

- Do you have a WorldShare account? If so, log on using your:

WorldShare URL:	
WorldShare user name:	
WorldShare password:	

- If you do not have a WorldShare Web address (URL):
 - Go to the OCLC Services page < <https://share.worldcat.org/myaccount> >.
 - Click Create account to begin; you need a 9-digit cataloging authorization. If you do not have this authorization, please contact OCLC [Customer Support](#) for assistance.
- To add Metadata Services to an existing account:
 - Go to the OCLC Services page < <https://share.worldcat.org/myaccount> >.
 - Click **Add services to an existing account**.
 - Enter your institution's **OCLC symbol, institution name, or zip code**.
 - Enter your **User Name and Password**; Click **Sign In**.
 - Enter your 9-digit cataloging authorization; Review options and add new services.

Review Collection Manager Institution level Settings

Click **Settings** in the left-hand navigation to begin.

NOTE: These Institution level settings apply to all Collection Manager Collections (such as those from WorldCat knowledge base, WorldCat Cataloging Partners, WorldCat Updates, etc.). The settings described below relate to the data sync collections specifically; Use **caution** when changing existing settings as the changes may impact these other collections.

- Click **OCLC Symbol** to open the panel.
- Verify that your institution’s OCLC symbol is selected.
- If your OCLC symbol is not selected:
 - Select the **OCLC Symbol** radio button.

- Click **Reports** to open the panel.
- To **Receive Email Reports**, click Yes
- In **Authorization Code**, enter your 9-digit cataloging authorization number _____
- Open **Data Sync Reports** and select the reports you want to receive, such as:
 - Data Sync Reports
 - Data Sync Monthly Reports
 - Bibliographic Record Processing
 - Bibliographic Record Processing Exceptions
 - LHR Processing
 - LHR Processing Exceptions
- In **Email Address (es)**, enter one or more email addresses to receive reports.
- Use a semicolon (;) to separate multiple email addresses.
 - _____
 - _____

- Click **Save to store** the selections.

Create a Collection

- Click **Create a Collection**.
- Select **Data Sync Collection** from the Collection Type drop-down menu.
- Select a collection type from the **Data Sync Type** drop-down menu:
 - Bibliographic
 - Local Holdings Records
 - Bibliographic + Local Holdings
 - Delete WorldCat Holdings
 - Delete Local Holdings Records
- Click [here](#) for more information about data sync collection types.
- **Note:** If you have a data sync collection of the same type, you will see this 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 instructions [here](#) to search for existing data sync collections.
- There are several panels that apply to a Data Sync collection.
- Complete **Properties, Comments and Contact** information panels for every collection
- For information about panels for specific collections, please go to:
 - Bibliographic data sync collection = page 5
 - Local Holdings Records data sync collection = page 8
 - Delete WorldCat holdings collection = page 9
 - Delete Local Holdings Records collection = page 10

Complete Properties

- 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. The Collection Name supports the following special characters: \$ @ # * ^ & () = +
- Select whether your institution is a **WMS Library**: **Yes or No**
Note: WMS = WorldShare Management System; These libraries have purchased the WorldShare Acquisitions and Circulation modules.
- 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, Library of Congress Numbers, or International Standard Book Numbers for this processing.
- Select whether to **Use Record Status for Processing**: **Yes or No**
- **NOTE: Record Status** is the value in Leader/05 of the record. When record status (Rec Stat) contains the value **d**, your institution's holding is deleted from WorldCat.
- For any other value, your holding symbol is set (added) on matching WorldCat records.

- For **Local Holdings Records** (LHRs) collections:
 - If value is **YES**, the LHR will be added or deleted based on the value **d** in Rec Stat
 - This can remove the WorldCat holding at institution-level
 - Remove WorldCat Holding When Final LHR Deleted **Yes or No**
 - (Optional) Enter a **Description** for the collection.
- NOTE: If a Third-Party Provider is sending files on your behalf, please write the provider name and contact information in this Description field.

Complete Contact Information

- Complete the **Contacts** information for at least one individual; OCLC recommends entering information for two to three individuals. List the primary contact in the first row. Use the add button (+) to create rows for additional contacts.

Last Name: _____ First Name: _____ Email: _____

Last Name: _____ First Name: _____ Email: _____

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. <http://www.oclc.org/en-US/policies/privacy.html>

Once these panels are completed, you can click **Save** to store your work. This action generates a **Collection ID**, which is a unique 7-digit number assigned to your data sync collection. The Collection ID is used to retrieve this saved collection and it is the first element in the file name when your data is sent to OCLC for processing.

Note **the Collection ID**: _____.

Learn how to search for the saved collection [here](#); more info about how to send data is [here](#).

Complete Comments (optional)

Comments are used to communicate with OCLC staff about your collection and your data. You would only complete this section while creating a collection if you have a question or need to convey information not addressed in the collection. You cannot add a comment until the collection is saved.

Topic: _____

Comment: _____

Note: Comments cannot be edited or deleted. The most recent comment appears first in the list.

Complete Bibliographic Record Information

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.

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

- Select whether to **Limit Added Records to WorldCat Staging: Yes or No**
NOTE: These records are put into a temporary area from where they can be reviewed, updated or eventually deleted. If NO is selected, unmatched records will be added to WorldCat as original cataloging if they meet [OCLC's standards of quality and completeness](#)
- Select whether to **Replace Records in WorldCat: Yes or No**
NOTE: If you select **Yes**, the records will be replaced if they meet certain conditions.

- Select whether to **Use Language of Cataloging (040 \$b) Field from Records: Yes or No**
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 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:** _____

Tag:_____ **Description:** _____ **Source Location:** _____

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. For more information about local bibliographic data please see: [Working with Local Bibliographic Data](#)

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

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.

- WorldCat Records

NOTE: With this selection, go to **Settings** and review information under **MARC Records**. The records output from a data sync collection will be delivered in a separate file.

Review Collection Manager Institution level Settings

- Click **MARC Records** to open the panel.
- Details about record settings and options for collections can be found [here](#).
- In **Customize Records**, determine if you want Local Data included (LHRs and/or LBDs)
- In **WorldCat updates**, determine the criteria for receiving updated records
 - Options include: **Based on changes to WorldCat master records for my knowledge base, query, data sync collections and WorldCat holdings;**
 - **Specify Excluding Conditions**
 - **Specify Including Conditions**
- In **Record Delivery**, select the record format and delivery frequency
- Click **Save**. Return to the bibliographic collection. Submit Collection

When all panels are completed, click **Submit Collection**. Note **Collection ID**: _____

Next Steps

Once the data sync collection is Submitted, the next step is to prepare your data and send files to OCLC. Refer to page 11 in this document for links to details about preparing data and sending files.

Complete Local Holdings Records Information

- Click **Properties** to open the panel.
 - For a Local Holdings Records collection, note the **Translation Table Status**. This value will change as OCLC completes this table for your review and approval.
- Enter information in **Contacts**. **(required before collection can be saved or submitted)**
- Enter **Comments** if more information needs to be conveyed about this data or collection.
 - OCLC may use Comments throughout the translation table creation process.
- Click **Local Holdings Records 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.

Complete the MFHD tab

- Enter your local system **Provider** name: _____
- Enter your local **System Name**: _____
- Enter your local system **Version**: _____
- Select the **OCLC Number Location** in your records:
 - 004
 - 014 \$a
 - 035 \$a

Note: The OCLC number for corresponding bibliographic record is required so that OCLC knows where to add the Local Holdings Records.

These numbers are optional for Local Holdings Records collections:

- Select the **Local System Holdings Record Number Location(s)** in your records:
 - None
 - 001
 - 014 \$a
- Select the **Local System Bibliographic Record Number Location(s)** in your records:
 - None
 - 001
 - 014 \$a
 - 035 \$a

Submit Collection

When all panels are completed, click **Submit Collection**. Note the **Collection ID**: _____

Next Steps: Refer to page 11 in this document for links to details about preparing and sending data.

Delete WorldCat Holdings Collection

- In the **Properties** panel, enter the following information:
 - Enter a **Collection Name** : _____
 - A collection name can be up to 100 characters and must be unique for an institution. The Collection Name supports the following special characters: \$ @ # * ^ & () = +
 - Select whether this collection represents a **Group** : **Yes** or **No**
Note: if **Yes**, complete the Group tab in the **Bibliographic Record Information** panel.
 - 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, Library of Congress Numbers, or International Standard Book Numbers for this processing.
- 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
 - Add **Institution Unique Identifier Location** field _____ and subfield _____
- Complete the **Contacts** information panel
- Add a note to the **Comments** panel, if needed.
- When all panels are completed, click **Submit Collection**. Note **Collection ID**: _____

Next Steps: Refer to page 11 in this document for links to details about preparing and sending data.

Delete Local Holdings Records (LHR) Collection

- In the **Properties** panel, enter the following information:
 - Enter a **Collection Name** : _____
 - A collection name can be up to 100 characters and must be unique for an institution. The Collection Name supports the following special characters: \$ @ # * ^ & () = +
 - Select whether your institution is a **WMS Library**: **Yes or No**
Note: WMS = WorldShare Management System; These libraries have purchased the WorldShare Acquisitions and Circulation modules.
 - Select whether this collection represents a **Group** : **Yes or No**
 - Select the **Original Data Format** : **MARC or Non-MARC**
NOTE: If **Non-MARC** is selected, please send a .CSV or .TXT file with additional data to create MARC records for processing.
 - Select to **Remove WorldCat Holding When Final LHR Deleted**: **Yes or No**
NOTE: If **No**, the institution level holding symbol will remain on the bib record.
- In the **Local Holdings Record Information** panel, enter the following information:
 - 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 **MFHD tab** and the **Processing tab**
- Complete the **Contacts** information panel
- Add a note to the **Comments** panel, if needed.
- When all panels are completed, click **Submit Collection**. Note **Collection ID**: _____

Next Steps: Refer to page 11 in this document for links to details about preparing and sending data.

Next Steps

Once the data sync collection is Submitted, use these links for details on how to prepare your data and upload files.

1. [Prepare your data](#)
2. [Send files to OCLC for processing](#)

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

3. [Retrieve files and reports](#)
4. Repeat these steps as needed to keep [WorldCat holdings](#) up to date.

Support Resources

- **Online Help:** WorldShare Collection Manager: [Create a data sync collection](#).
- **Web page:** [WorldCat data sync collections](#) in WorldShare Collection Manager.
 - Contains links to training, online help and other resources
 - <http://oc.lc/datasync>
- [Frequently Asked Questions](#)
- **With questions, contact:**
 - **OCLC Customer Support:** <http://oc.lc/support>
 - 800-848-5800 or support@oclc.org (US)
 - Attend the [Office Hours](#)
 - Wednesdays, 2:00 pm – 3:00 pm (US-ET)
 - Thursdays, 11:00 am – 12:00 pm (US-ET)