

September 28, 2016

An introduction for Texas Libraries

## WorldCat data sync collections in WorldShare Collection Manager

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Member Education



The **Batchload** service is transitioning to ...

**Batchload**



**Data sync collection**

... **WorldShare Collection Manager** as data sync collections

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## What does a data sync collection do?

- A data sync collection matches records from your local catalog with records in WorldCat and manages holdings on those matching records.
- Supports the Texas Navigator program
  - Displays your library information in WorldCat
  - Makes your items searchable in Navigator
  - Adds OCLC #s to records for your local library system

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## Data sync collections are set up by data type:

- Bibliographic \*
- Delete WorldCat Holdings \*

❖ Bib or Delete WC holdings accepts MARC records or numeric search keys

- Configure one collection of each type, easier to manage this process
- Use the same collection to submit data type as often as needed

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## The steps in the process

- **Create a data sync collection**
- Send your bibliographic records to OCLC
- OCLC processes your records against WorldCat
- OCLC adds the OCLC number to your records
- OCLC returns records to you
- You re-load records and index the OCLC numbers
  - Same steps as with the current Batchload process

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## Where do you get started?

- **Obtain your WorldShare Collection Manager account**
  - Every Texas library starts here:
- <http://www.oclc.org/content/forms/worldwide/en/wckb-request.html>



Enter Institution and  
Contact Information / submit form

Welcome email will contain your  
Custom Web address and username  
Follow Set/reset password to create  
your password

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# Request access to WorldShare



## Request access to WorldShare® Collection Manager and the WorldCat® knowledge base

WorldShare Collection Manager together with the WorldCat knowledge base helps manage your electronic resource holdings and expose a consistent view of your resources in OCLC and non-OCLC applications.

**Use this form to gain access to WorldShare Collection Manager and the WorldCat knowledge base.**

To add another WorldShare Collection Manager/WorldCat knowledge base contact for your library, submit your request using the [OCLC Services account page](#).

Alternatively, you can create and manage additional staff accounts using the [Admin module](#) in the WorldShare interface.

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### Institution Information

<p>› Institution Name <input type="text"/></p> <p>OCLC Institution Symbol <input type="text"/> <a href="#">Directory of OCLC Libraries</a></p> <p>Institution/Registry ID (if available) <input type="text"/> <a href="#">Find your Registry ID</a></p>	<p>Institution Address 1 <input type="text"/></p> <p>Institution Address 2 <input type="text"/></p> <p>City <input type="text"/></p> <p>State or Province <input type="text"/></p> <p>ZIP or Postal Code <input type="text"/></p> <p>Country or Region Please select : <input type="text"/></p>
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### Contact Information

<p>› First Name <input type="text"/></p> <p>› Last Name <input type="text"/></p>	<p>› E-mail <input type="text"/></p> <p>› Phone Number <input type="text"/></p>
--	---

Enter Institution and  
Contact Information

Include your OCLC Symbol

### Comments

Comments or Questions

Texas Navigator Library

↑ ↓

[Next](#)

Add Comment:  
Texas Navigator Library

Click Next when finished

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## Review summary of the form / Click Submit

Below is a summary of your form for you to review.

To make changes, click **Back** at the bottom of the page to return to the form. Make your changes, then return to this summary by clicking **Next**.

If you are satisfied with your form summary, please print this summary page for your records. After you submit your form, you will not be able to print a summary.

To submit your form, click **Submit** at the bottom of this page. You may also cancel your form by clicking **Cancel**. If you cancel your form, you will terminate your form session.

**NOTE:** Approximately one week after you submit this form, you will receive an email with your necessary credentials and instructions.

Review

Institution Information

Contact Information

OCLC symbol

Click Submit when finished

**Comments**

---

Comments or Questions  
Texas Navigator Library

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## Welcome email includes...

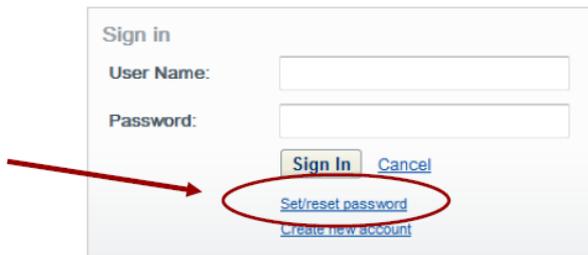
- WorldShare Collection Manager
  - OCLC symbol: \_\_\_\_\_
  - Your institution's WorldShare URL in this format:  
<http://YOURLIBRARYPREFIX.share.worldcat.org/wms>
  - Your username: \_\_\_\_\_
- Information on how to [establish a password](https://www.oclc.org/content/dam/support/worldshare-metadata/password.pdf)  
<https://www.oclc.org/content/dam/support/worldshare-metadata/password.pdf>
- Authorization number for reports: 9-digit number

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## Establish a password...

1. Visit your library's WorldShare URL. For example: <https://yourlibraryprefix.share.worldcat.org/wms>
2. On the "Sign in" screen, click the [Set/reset password](#) link directly beneath the "Sign In" button.



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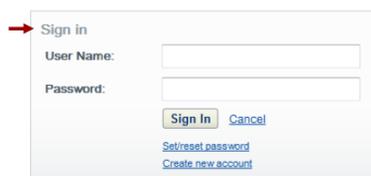


## Establish a password...

3. In the new window that appears, type your User Name and click "Request new password" button.



4. An email will be sent to the email address associated with your account containing a link that lets you set your password. Click this link, and create your password. **Note: The link will expire in 24 hrs.**
5. Once again, visit your library's WorldShare URL.
6. Enter your User Name and the Password. Click the "Sign In" button.



You have now set the password for the WorldShare interface.

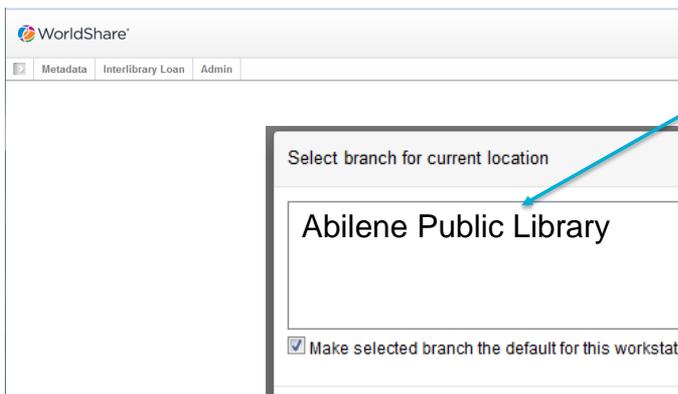
Should you at any time misplace or forget your password, it can be reset by repeating the steps in this guide.

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# SUBMIT A COLLECTION

## Logon to WorldShare...



Select your location  
Click OK

## Check institution settings

Verify OCLC symbol

Set up Reports

The screenshot shows the WorldShare Admin interface. The top navigation bar includes 'Positions', 'Licenses', 'Circulation', 'Interlibrary Loan', 'Analytics', and 'Admin'. The 'Admin' menu is expanded, showing 'Collection Manager' and 'Settings'. The 'Settings' menu is also expanded, listing various options: 'OCLC Symbol', 'Knowledge Base Data', 'WorldCat Holdings', 'Proxy and Authentication', 'Provider Settings', 'Sharing', 'WorldCat Discovery', 'MARC Records', 'Reports', and 'Display Options'. Two orange arrows point to the 'OCLC Symbol' and 'Reports' options. On the left side of the interface, there are several buttons: 'Collection' (dropdown), 'My Selected Collections' (checkbox), 'Search', 'Activity History', 'Approve Changes to Global Collections', 'View Recent Collections', 'Create a Collection', and 'Settings'. An orange arrow points from the 'Settings' button on the left to the 'Settings' option in the right-hand menu.

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OCLC

## Institution settings – OCLC symbol

The screenshot shows the 'Settings' page for the OCLC Symbol. At the top, there is a 'Save' button highlighted with a blue arrow. Below it, the 'OCLC Symbol' section is expanded. The text reads: 'Your OCLC symbol will be used to maintain WorldCat holdings and output MARC records.' There is a 'Refresh from WorldCat Registry' button. Under 'OCLC Symbol', there are two radio button options: 'TS259' (selected) and 'None'. A blue arrow points to the 'None' option. To the right of the radio buttons, there is a text box that says 'Select your OCLC symbol' and 'Click Save'.

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OCLC

## Institution settings - Reports

**Settings**

[Save](#)

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

▼ Reports

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

**Receive Email Reports**  Yes  No

**Authorization Code \***  [?](#)

1. Receive email reports: Yes

2. Enter 9-digit authorization from welcome email

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## Institution settings - Reports

**Settings**

[Save](#)

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

### Report Types \*

- ▶ Records Reports
- ▶ WorldCat Holdings Reports
- ▶ Cataloging Partner Reports
- ▼ Data Sync Reports
  - Data Sync Records
  - Data Sync Monthly Records
  - Bibliographic Record Processing
  - Bibliographic Record Processing Exceptions
  - LHR Processing
  - LHR Processing Exceptions

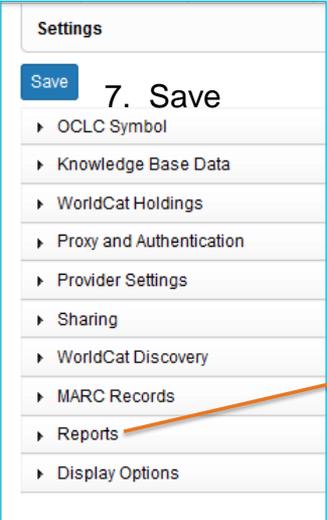
3. Select data sync reports

4. Check reports for Bib records

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## Institution settings - Reports



**Settings**

**Save** 7. Save

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

5. Enter email address to receive reports

Email Address(es) \*  ?

Report Format

- HTML
- Excel

Receive as

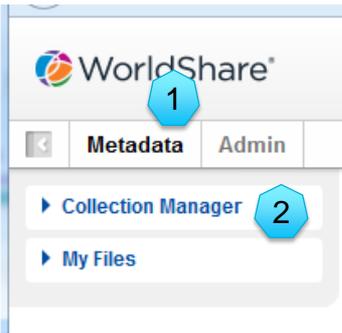
- Email Attachment
- Hyperlink

6. Select report format and delivery

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## Search for data sync collections



WorldShare®

Metadata Admin

Collection Manager 2

My Files

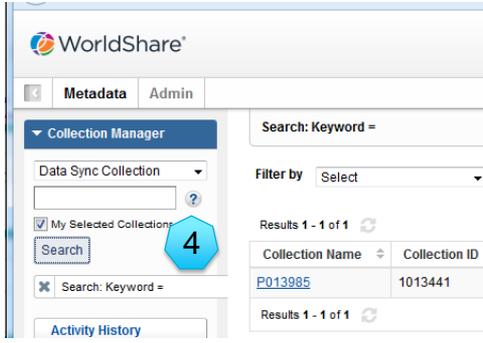
1. Open Metadata >
2. Open Collection Manager
3. Choose data sync collection from drop/down list
4. Click **Search** to display pre/configured collections



Collection Manager

- Collection
- Collection
- Title
- Provider
- Data Sync Collection**
- Search

Activity History



WorldShare®

Metadata Admin

Collection Manager

Data Sync Collection

Search: Keyword =

Filter by Select

Results 1 - 1 of 1

Collection Name	Collection ID
P013985	1013441

Results 1 - 1 of 1

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## Display the data sync collections

.oan   Analytics   Admin

Search: Keyword =

Filter by  Enter search terms

Results 1 - 2 of 2  Rows 10

Collection Name	Collection ID	Collection Type	Collection Status	Translation Table Status	Last Updated	Created	Default
<a href="#">P019279</a>	1010946	Delete WorldCat Holdings	In Progress	In Progress	06/30/2016 9:44:49 AM	06/30/2016 9:44:49 AM	No
<a href="#">P002411</a>	1011311	Bibliographic	In Progress	In Progress	06/30/2016 9:43:43 AM	06/30/2016 9:43:43 AM	Yes

Results 1 - 2 of 2  Rows 10

1. Click Collection Name to open that collection

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## Bibliographic Data Sync Collection

\* These panels appear for every collection.

Other panels vary based on collection type

Review and complete information in these panels

* ▶ Properties	Includes Collection ID
▶ Bibliographic Records Information	
▶ Local Bibliographic Data Information	
▶ MARC Record Output Information	
* ▶ Comments	
* ▶ Contact Information	

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## Properties

- Collection Name: **Project ID**
- Optional: rename the collection to make it more descriptive
- e.g.: **Set Holdings TX Navigator**
- Collection ID: **7-digit number**
- System-assigned if Save Progress or Submit Collection is selected
- Institution and Symbol display automatically

Collection ID: 1011500

▼ Properties

<b>Collection Name *</b>	P002411
<b>Collection ID</b>	1011500
<b>Institution</b>	Training Library
<b>Symbol</b>	TS259

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## Properties

**Group**  Yes  No

**WMS Library**  Yes  No

- Group: **NO**: If you send records for your library ONLY  
If you send records for multiple libraries, select YES. OCLC Support can assist with this setup.
- WMS Library: **NO**

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## Properties

Collection Type	<input type="text" value="Bibliographic"/>
Original Data Format	<input checked="" type="radio"/> MARC <input type="radio"/> Non-MARC
Use Record Status for Processing	<input type="radio"/> Yes <input checked="" type="radio"/> No

Collection Type: **Bibliographic**

Original data format: **MARC**

Use Record Status for Processing:  
**NO** – set up **Delete WorldCat Holdings** to cancel holdings

Choose the collection type for the needed action:  
**Bibliographic** – will set holdings  
**Delete WorldCat Holdings** – will cancel holdings

Choose the data type you plan to send:  
**MARC** = MARC bibliographic records  
**Non-MARC** = lists of OCLC numbers or spreadsheet of data

**Record Status** value in Leader/05 of the record. When record status (Rec Stat) has value **d**, holding is removed from WorldCat. **Yes** – if your system outputs this d value

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## Properties

Collection Status	Save In Progress
Collection Status Last Updated	06/21/2016 8:14:06 AM by WorldShare Trainer
Description	<input type="text" value="Pre-populated from previous Batchload P002411"/> <span style="float: right;">(45/500)</span>

Collection Status: **Save in Progress** -

when collection is completed, click Submit Collection to update this status to Submitted

Description: **Pre/populated ...**

Add note: **Texas Navigator participant**

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## Bibliographic record information

▼ Bibliographic Record Information

**Initial Estimate for Record Count \***  

Enter an estimate of the number of records you plan to send in your first file

Default value = 0

If you cannot provide an exact number, enter an ESTIMATE

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## Bibliographic record information - System

**System** **Processing**

**Provider**

**System Name**

**Version**

**System Tab:**

Enter information about your ILS in Provider, System Name and Version

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## Bibliographic record information – System

OCLC Number Location(s)

Enter location of OCLC number in your records

Default location is 035 \$a

If different location in your records, choose location from drop/down list

If the number appears in multiple locations, use + to add lines to enter more locations

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## Bibliographic record information - System

Local System Number Location(s) \*

Enter location of Local System number in your records

Default location is 001

If different in your records, choose location from drop/down list

Use this unique number as match point when reloading records back into your ILS after processing is completed. (option if My Library Records is selected as output).

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## Bibliographic record information -- Processing

System	Processing
Limit Added Records to WorldCat Staging	<input checked="" type="radio"/> Yes ? <b>Added Records, select YES</b> <input type="radio"/> No No original records will be added to WorldCat
Replace Records in WorldCat	<input type="radio"/> Yes ? <input checked="" type="radio"/> No <b>Replace Records, select NO (default value)</b>
Use Language of Cataloging (040 \$b) Field from Records	This form field is relevant for institutions with a collection that has items that were primarily cataloged in a language other than English. <input checked="" type="radio"/> Yes ? <b>Language of Cataloging, select YES (default value)</b> <input type="radio"/> No

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## Bibliographic record information -- Processing

<b>OPTIONAL</b>	<b>Excluded Information for Fixed Fields</b> For information that you want to exclude from processing, enter the location information (such as the Tag, Type, Offset, or Length), the value that appears in that location, and the action that needs to be taken. Tag: Select   Type: Select   Offset:   Length:   Condition: Contains Any Value   Value: <input type="text"/> Action: Exclude Any Record(s) Containing Data   Reset
	<b>Excluded Information for Variable Fields</b> For information that you want to exclude from processing, enter the location information (such as the Tag, indicators, or Subfields), the value that appears in that location, and the action that needs to be taken. Tag:   Ind 1: Select   Ind 2: Select   Subfield: Select   Condition: Contains Any Value   Value: <input type="text"/> Action: Exclude Any Record(s) Containing Data   Reset

Complete these fields if you want fields or records to be excluded from processing. Consult the documentation for details.

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# MARC Record Output Options

**Enable MARC Record Delivery**  Yes  No

**Records Returned**

WorldCat Records   
 My Library Records  
 WorldCat Records

go to the Settings panel

Choose My Library Records  
 OCLC number will be added to field 035 \$a

Enable MARC Record Delivery = YES  
 if you want your records returned after processing

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## Contacts

▼ Contact Information

Fill out all of the contact information fields for at least one individual. We recommend that you provide the contact information for two to three individuals. List the contacts in order with the primary contact in the first row.

Last Name	First Name	Title	Email Address	Action
Kie	Kathy	??	kiek@oclc.org	<input type="button" value="+"/> <input type="button" value="-"/>

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](#).

Verify 1<sup>st</sup> contact and edit as needed  
 Add telephone number in Title space  
 Use + in Action column to add line for another staff member

Information is required in each column

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## Comments

Comments

Add Comment

Results 1 - 1 of 1

Rows 10

Topic	Comment	Date Created	User

Add Comment

Topic \* Reclamation

User WorldShare Trainer (82/4000)

Comment \* Sample Comments :  
Texas Navigator Participant  
or  
Second reclamation project; \$100 charge is confirmed

Add Close

Communicate with OCLC staff about your data sync collection

Newest comment is listed first

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## Buttons

Submit Collection Save Progress Make Default Collection

Select Submit Collection when collection is completed; this alerts OCLC to expect data from your library

Select Save Progress if you need to gather more information before submitting the collection

The first collection created automatically becomes the default collection; if you have more than one collection, you can set the default collection

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## Create a collection

To create a new collection start here at Create a Collection

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## Delete WorldCat Holdings Data Sync Collection

\* These panels appear for every collection.

Review and complete information in these panels

* ▶ Properties	Includes Collection ID
▶ Bibliographic Records Information	
* ▶ Comments	
* ▶ Contact Information	

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## Upload Files

- There are 2 methods of uploading files
  - Metadata > My Files > Upload (File size – 1 G)
  - Secure FTP (contact OCLC Support for credentials) (No file size limit)
- **Both methods will accept larger files** of data
- NO label file is needed for either method
- Send files as often as needed to maintain accurate holdings

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## File names

- 1004100.ts259.bibdata.mrc

Bibliographic MARC records

- 101215.TXB.bibdeletes.csv

OCLC numbers to delete  
WorldCat Holdings

Collection ID is first in each file name

- Every file name with bibliographic records must have:
  - CollectionID.OCLCsymbol.mrc
- Every file with numeric search keys must have:
  - CollectionID.OCLCsymbol.csv OR CollectionID.OCLCsymbol.txt

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## Upload

1. Open My Files > Select Uploads
2. Select Browse to locate the file you want to upload

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## Metadata > My Files > Uploads

File Name	File Type	Size	Upload Date
1004100.ts259.bibdata.mrc	Data sync bibliographic		

3. Select the File Type
4. Click Upload
5. File will appear in the table so OCLC can pick it up for processing

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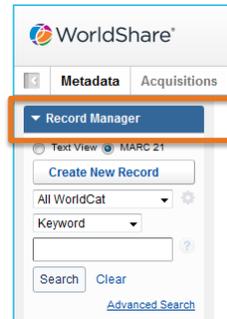


# Post / Processing

Obtain output files and review Processing and Exception Data Reports



Review and process unresolved records  
Available to libraries with Cataloging subscriptions



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## Data sync collection reports from Usage Stats

Report Name	Location	Notification
Bibliographic Record processing summary	stats.oclc.org	Y
Bibliographic Record processing exception summary	stats.oclc.org	Y

Reports available up to 3 years

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## Data sync collection files from My Files

Report Name	Location	Notification
Bibliographic Cross Reference File	xfer/metacoll/reports	N
Bibliographic Exception Detail File	xfer/metacoll/reports	N
Unresolved Cross Reference File	xfer/metacoll/reports	N

Reports available for 90 days ONLY!

Also available through FTP

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 OCLC

**REVIEW**

 OCLC

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## Register for your WorldShare logon information



### Request access to WorldShare® Collection Manager and the WorldCat® knowledge base

WorldShare Collection Manager together with the WorldCat knowledge base helps manage your electronic resource holdings and expose a consistent view of your resources in OCLC and non-OCLC applications.

**Use this form to gain access to WorldShare Collection Manager and the WorldCat knowledge base.**

To add another WorldShare Collection Manager/WorldCat knowledge base contact for your library, submit your request using the [OCLC Services account page](#).

Alternatively, you can create and manage additional staff accounts using the [Admin module](#) in the

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

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## Gather information for your data sync collection

Checklist helps you gather needed information

<http://oc.lc/datasync>

Checklist for creating a WorldCat data sync collection

July 2016

### Create WorldCat data sync collections

#### 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 information is needed once you begin creating the collection, there is a Save Progress button so you can save your work to complete in the future.

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:	

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## Create Bibliographic data sync collections

WorldShare®

Collection Manager

Collection

My Selected Collections

Search

Activity History

Approve Changes to Global Collections

View Recent Collections

Create Collection

Settings

My Files

My Apps

Create a Collection

Collection Type: Data Sync Collection

Data Sync Type\*: Bibliographic

A WorldCat data synchronization collection synchronizes a library's bibliographic and holdings data with WorldCat.

Create Cancel

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## Review your pre-populated collection(s)

Collection Manager

Data Sync Collection

Search

Search: Keyword =

Activity History

Approve Changes to Global Collections

Search: Keyword =

Filter by: Select

Enter search terms

Filter Reset

Results 1 - 2 of 2

Collection Name	Collection ID	Collection Type	Collection Status	Translation Table Status	Last Updated	Created	Default
<a href="#">P019279</a>	1010946	Delete WorldCat Holdings	In Progress	In Progress	06/30/2016 9:44:49 AM	06/30/2016 9:44:49 AM	No
<a href="#">P002411</a>	1011311	Bibliographic	In Progress	In Progress	06/30/2016 9:43:43 AM	06/30/2016 9:43:43 AM	Yes

Results 1 - 2 of 2

## When completed, Submit your collection(s)

Submit Collection

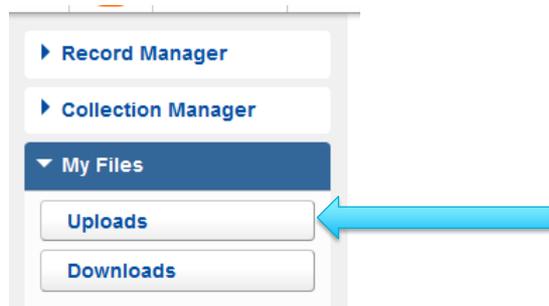
Save Progress

Make Default Collection

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## Send your data for processing



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## Thank you!

### Questions:

#### OCLC Customer Support

[support@oclc.org](mailto:support@oclc.org) or 800-848-5800 (US)

#### Attend Office Hours

Details at: <http://oc.lc/datasync>

#### Attend Training

Details at: <http://oc.lc/datasync>

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