



Create a WorldCat data sync collection

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 as a guide to gather the information you will need to create a WorldCat data sync collection in WorldShare Collection Manager.

Logon to WorldShare Collection Manager

The first step is to obtain your WorldShare Collection Manager account. Complete the request form at this link to obtain your WorldShare Web address and user name. Enter 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 URL in this format: <http://YOURLIBRARYPREFIX.share.worldcat.org/wms>

Your username: _____

Information on how to [establish a password](#)

Authorization number for reports: 9-digit number

Review Collection Manager Institution level Settings

Click **Metadata**, then **Collection Manager** to open the left panel.
Click **Settings** to open the Institution-level settings.

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: Select the **OCLC Symbol** radio button.

2. Click **Reports** to open the panel.
 - a. To **Receive Email Reports**, click Yes
 - b. In **Authorization Code**, enter 9-digit authorization number _____
3. Open **Data Sync Reports** and select the reports you want to receive:
 - Bibliographic Record Processing
 - 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

6. Click **Create a Collection**.
7. Select **Data Sync Collection** from the Collection Type drop-down menu.
8. Select a collection type from the **Data Sync Type** drop-down menu:
 - Bibliographic
 - Delete WorldCat Holdings

Note: OCLC started data sync collections for some libraries.

Follow these steps to search for a data sync collection:

1. Open Metadata >
2. Open Collection Manager
3. Choose data sync collection from Collection drop/down list
4. Click **Search** to display pre/configured collections
5. Click the Collection Name (which is the Project ID from a current/previous batchload project) to open this collection and complete it.

You can edit this collection for your current purpose, even if you stopped using that Project ID. You do not need to create a new collection.

Complete Properties

Click **Properties** to open the panel.

Enter (or Edit) the **Collection Name** : _____

Sample collection names: Additions; or P0015232; or Holding Updates

Select these values for these questions:

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

** Group administrators: select **YES**; complete Group tab in Bibliographic Record Information*

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

- 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**
- **Yes (send only OCLC numbers, LCCNs, ISBNs or ISSNs)**
- **No (send spreadsheet with more info)**
OCLC accepts files in .CSV or .TXT format 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 the Group tab

- 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 OCLC symbol is set or canceled.

1. Symbol Used for Adding Records to WorldCat

1. **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.

2. 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: _____

3. **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.
4. **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.
5. **Group Bibliographic Translation Table status**
This table is created by OCLC and sent to the group administrator for review and approval; the status of this creation and review is indicated by the values:

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 (**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.

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 8 in this document for links to details about preparing data and sending files.

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 8 in this document for links to details about preparing and sending data.

Submit your data for processing

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](#)
 - Tuesdays, 12:00 pm – 1:30 pm (US-ET)