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**WorldCat data sync collections:  
A tool for holdings maintenance**

An introduction for Texas Libraries

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Member Education




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**Session goal**

- Session goal is to review the setup for WorldCat data sync collections to maintain holdings
  - How to create this collection and send files for processing
- Supports foundational goal of Texas / OCLC agreement
  - To ensure that patrons and staff who use Texas libraries have access to interlibrary loan services and have a way to maintain current holdings information in WorldCat

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**Agenda**

- Introduction to WorldCat data sync collections
- How to get started with WorldShare
- How to create a collection
- How to upload files for processing
- Support/ training/ documentation resources

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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>



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.

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.

- Group administrators: request the WorldShare custom Web address under your Group OCLC symbol
- Don't have one? Request the group symbol from Customer Support

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**Enter Institution and Contact Information**

Enter your OCLC Symbol  
Or group OCLC symbol

Comments  
Comments or Questions  
Texas Navigator Library

Add Comment:  
Texas Navigator Library

Click Next when finished

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**Review summary of the form / Click Submit**

Review

Institution Information  
Contact Information  
OCLC symbol

Click Submit when finished

Comments  
Comments or Questions  
Texas Navigator Library

Submit Cancel Back

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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

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### Logon to WorldShare...

Select your location  
Click OK

Select branch for current location

Abilene Public Library

Make selected branch the default for this workstation

OK

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### Create a collection

To create a new collection start here at Create a Collection

Select data sync collection

Create a Collection

Collection Type: Data Sync Collection

Data Sync Type: Select

- Select
- Biographic
- Local Holdings Records
- Biographic and Local Holdings Records
- Delete WorldCat Holdings
- Delete Local Holdings Records

Select data sync type

Create Cancel

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### Search for data sync collections

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

WorldShare

Metadata Admin

Collection Manager

Collection: Data Sync Collection

Search

Activity History

WorldShare

Search Keyword

Filter by: Select

My Selected Collections

Search

Results: 1 of 1

Collection Name	Collection ID
PS12882	1013441

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### Display the data sync collections

Collection Name	Collection ID	Collection Type	Collection Status	Transition Table Status	Last Updated	Created	Default
1010948	1010948	Direct HoldCat Holdings	In Progress	In Progress	06/30/2016 9:44:49 AM	06/30/2016 9:44:49 AM	No
1010311	1010311	Bibliographic	In Progress	In Progress	06/30/2016 9:43:43 AM	06/30/2016 9:43:43 AM	Yes

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 ID: 1011500

Submit Collection Save Progress Make Default Collection

- 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 Name *	P002411
Collection ID	1011500
Institution	Training Library
Symbol	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 / Group

**Group**  
select YES if you send records for multiple libraries  Yes ?  No

**WMS Library**  Yes ?  No

- Group data sync collections are set up under an OCLC group symbol
- If you are a group administrator with this symbol, set up collection under that symbol
- If you do not have a group symbol, request one through Customer Support
- Groups need WorldShare custom Web address under group symbol

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### Properties

Collection Type: Bibliographic

Original Data Format:  MARC  Non-MARC

Use Record Status for Processing:  Yes  No

Set up Delete WC Holdings to remove holdings

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

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

Use Record Status for Processing: **NO** – set up **Delete WorldCat Holdings** to cancel holdings  
**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 (45/500)
Description	Pre-populated from previous Batchload P002411

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)

Location 035 \$a Tag 035 Subfield

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)

Location 001 Tag 001 Subfield

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  Yes  No **Added Records, select YES**  
No original records will be added to WorldCat

Replace Records in WorldCat  Yes  No **Replace Records, select NO (default value)**

Use Language of Cataloging (040 \$b) Field from Records  Yes  No **Language of Cataloging, select YES (default value)**

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### Bibliographic record information -- Processing

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

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### Bibliographic record information -- Group

- Symbol used for adding records to WorldCat :
  - this value will be used to build 040 \$a and \$c when records are added to WorldCat
    - Default: Group symbol
    - Or, select a different Institution ID
- Institution unique ID location: \* TAG \_\_\_\_\_ Subfield \_\_\_\_\_

\* Used to build translation table for correct processing of holdings in WorldCat

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### MARC Record Output Options

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

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### Contacts

Enter 1 or 2 staff members as contacts  
 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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### Buttons

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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### Comments

Communicate with OCLC staff about your data sync collection

Newest comment is listed first

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

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### Check institution settings

Verify OCLC symbol

Set up Reports

WorldShare

Metadata Admin

Settings

Collection Manager

Collection

My Selected Collections

Search

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

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

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### Institution settings – OCLC symbol

Settings

Save

OCLC Symbol

Your OCLC symbol will be used to maintain WorldCat holdings and output MARC records.

Refresh from WorldCat Registry

OCLC Symbol

TS259 ?

None

Select your OCLC symbol

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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

Reports

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

Receive Email Reports

Yes

No

1. Receive email reports: Yes

Authorization Code\*

100071674 ?

2. Enter 9-digit authorization from welcome email

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### Institution settings - Reports

**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

7. Save

Email Address(es) \*

Report Format

HTML

Excel

Receive as

Email Attachment

Hyperlink

5. Enter email address to receive reports

6. Select report format and delivery

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### Create a collection

To create a new collection start here at Create a Collection

Select data sync collection

Select data sync type

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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.TXFLW.bibdata.mrc BibliographicMARC records
  - Other extensions: .dat .bin
- 101215.TXB.bibdeletes.csv OCLC numbers to delete  
WorldCat Holdings
  - Other extension: .txt

Collection ID is first in each file name

- File name needs: CollectionID.OCLCsymbol.extension

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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

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 in Connexion or Record Manager (w Cat sub)

Review unresolved records in your ILS  
Re-submit them via data sync for processing

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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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## REVIEW

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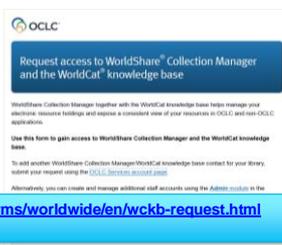
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### Request WorldShare logon information



<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://oclc.org/datasync>



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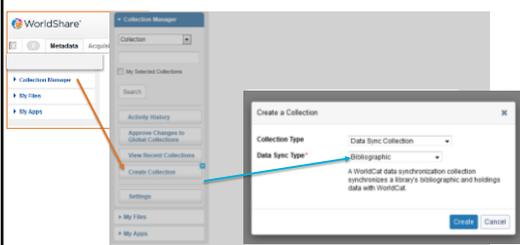
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### Create Bibliographic data sync collections



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### Send data for Bib collections

Via sFTP

Or via Metadata > My Files

The screenshot shows the WorldShare Metadata interface. On the left, a file tree under '/metacoll/in/bib' has folders for 'in', 'bib', 'data', 'lhr', 'provider', 'out', 'ongoing', 'reports', and 'test'. The 'in' and 'bib' folders are highlighted with blue boxes. On the right, the 'Metadata' section is active, showing an 'Upload File' button with a file name '1004108.lu253.bibdata.mrc' and a file type of 'Data sync bibliographic'. Below this, there are 'File Name' and 'File Type' columns in a table.

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### Questions & Discussion

The illustration shows a white 3D figure of a person standing with their hand on their head, looking up at three large, yellow, 3D question marks.

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**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>

**Thank you!**

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