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

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
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
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

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](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

Request access to WorldShare

- Group administrators:
  - request the WorldShare custom Web address under your Group OCLC symbol
- Don’t have one?
  - Request the group symbol from Customer Support
Enter Institution and Contact Information

Enter your OCLC Symbol
Or group OCLC symbol

Add Comment:
Texas Navigator Library
Click Next when finished

Review summary of the form / Click Submit

Review
Institution Information
Contact Information
OCLC symbol

Click Submit when finished

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

- Authorization number for reports: 9-digit number
Establish a password...

1. Visit your library’s WorldShare URL. For example: https://yourlibraryprefix.share.worldcat.org/wmc
2. On the “Sign in” screen, click the Set/reset password link directly beneath the “Sign In” button.

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 the link, and create your password. Note: The link will expire in 24 hours.
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 change or forget your password, it can be reset by repeating the steps in this guide.
Logon to WorldShare...

Select your location
Click OK

Create a collection

To create a new collection start here at Create a Collection

Select data sync collection

Select data type

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
Display the data sync collections

1. Click Collection Name to open that collection

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

- 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: 1016596

- Properties
  - Collection Name: Project ID
  - Collection ID: 1016596
  - Institution: Training Library
  - Symbol: TS259
Properties

- **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

Properties / Group

- 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.

Properties

- **Collection Type**: Bibliographic
- **Original Data Format**: MARC
- **Use Record Status for Processing**: Yes

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.
Properties

Collection Status: Save in Progress
Description: Pre-populated...
Add note: Texas Navigator participant

Bibliographic record information

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

Bibliographic record information - System

System Tab:
Enter information about your ILS in Provider, System Name and Version
Bibliographic record information – System

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

Bibliographic record information - System

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).

Bibliographic record information -- Processing

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

Replace Records, select NO (default value)

Language of Cataloging, select YES (default value)
**Bibliographic record information -- Processing**

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

**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

**MARC Record Output Options**

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

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

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

Comments

Communicate with OCLC staff about your data sync collection

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

Newest comment is listed first
Check institution settings

- Verify OCLC symbol
- Set up Reports

Institution settings – OCLC symbol

- Select your OCLC symbol

Institution settings - Reports

1. Receive email reports: Yes
2. Enter 9-digit authorization from welcome email
Institution settings - Reports

1. Check reports for Bib records
2. Select data sync reports
3. Data Sync Reports
   - Data Sync Records
   - Data Sync Monthly Records
   - Bibiographic Record Processing Errors
   - MARC Processing
   - MARC Processing Exceptions
4. Check reports for Bib records
5. Enter email address to receive reports
6. Select report format and delivery
7. Save

Create a collection

To create a new collection start here at Create a Collection

Select data sync collection

Select data sync type
Delete WorldCat Holdings Data Sync Collection

- These panels appear for every collection.

<table>
<thead>
<tr>
<th>Properties</th>
<th>Includes Collection ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bibliographic Records Information</td>
<td></td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
<tr>
<td>Contact Information</td>
<td></td>
</tr>
</tbody>
</table>

Review and complete information in these panels.

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

File names

- 1004100.TXFLW.bibdata.mrc
  - Other extensions: .dat, .bin
  - Bibliographic MARC records

- 101215.TXB.bibdeletes.csv
  - Other extension: .txt
  - OCLC numbers to delete WorldCat Holdings
  - Collection ID is first in each file name

- File name needs: CollectionID.OCLCsymbol.extension
Upload

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

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

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
Data sync collection reports from Usage Stats

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Location</th>
<th>Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bibliographic Record processing summary</td>
<td>stats.oclc.org</td>
<td>Y</td>
</tr>
<tr>
<td>Bibliographic Record processing exception summary</td>
<td>stats.oclc.org</td>
<td>Y</td>
</tr>
</tbody>
</table>

Reports available up to 3 years

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Data sync collection files from My Files

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Location</th>
<th>Notification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bibliographic Cross Reference File</td>
<td>xfer/metadata/reports</td>
<td>N</td>
</tr>
<tr>
<td>Bibliographic Exception Detail File</td>
<td>xfer/metadata/reports</td>
<td>N</td>
</tr>
<tr>
<td>Unresolved Cross Reference File</td>
<td>xfer/metadata/reports</td>
<td>N</td>
</tr>
</tbody>
</table>

Reports available for 90 days ONLY! Also available through FTP

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REVIEW
Request WorldShare logon information

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

Gather information for your data sync collection

Checklist helps you gather needed information

http://oclc/datasync

Create Bibliographic data sync collections

Create a Collection
Send data for Bib collections

Via sFTP

Or via Metadata > My Files

Questions & Discussion

Questions:

OCLC Customer Support
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!