

## WorldCat data sync collections: Processing paths for optimal outcomes

### Introduction

Data sync is an automated process that compares records from your library against records in WorldCat and manages holdings on the matching records. This process also facilitates adding new records to WorldCat.

There are three basic questions:

1. What is the goal of your project?

- To maintain institution-level holdings in WorldCat
- To synchronize your library records with records in WorldCat
- To create / update local holdings records
- To delete WorldCat holdings

2. What metadata do you have?

- MARC records (brief or full-level records)
- Non-MARC data (OCLC record numbers)
- MARC format for holdings (MFHD)
- Spreadsheet of patterned data for bib or local holdings information (charges apply)

3. What output do you need?

- Your own records with OCLC numbers included
- WorldCat records with local data included
- WorldCat records and LHRs
- LHRs only

### Bibliographic collection

The bibliographic collection is the most versatile collection type. It is used for holdings maintenance as well as for reclamation processing. This collection type accepts only MARC records for processing. Output includes, a library's own records returned or WorldCat records with library's local bibliographic data included. Detailed reports are available for any type of data sync processing.

These elements pertain to a bibliographic collection:

- **Properties:** Original Data Format: **MARC**
  - Use Record Status for Processing: **YES or NO**
    - based on record characteristics from your local system
  - Description: add notes about data, processing, or other details
- **Bibliographic Record:**
  - System: OCLC number location & local system number location
  - Processing: Limit Added Records to WorldCat Staging: **NO** (default value)

- **MARC Records:** Enable MARC Record Delivery: **YES**
  - *Deliver my library records:* the OCLC control number (OCN) in field 035 \$a (OCoLC)
  - *Deliver WorldCat Records:*
    - deliver unresolved records in a separate file (optional)
    - update Institution Settings > MARC records
      - select output format **MARC 21 with MARC 8 (or other option)**
      - specify field for **local system number** (LSN)
      - specify how to include local bib data
- **Contact Information:** enter a primary contact and a few other individuals who may be contacted about your collection specifications or data.
- **Save** collection to obtain the Collection ID
- **Comments:** add note with questions or special requests for processing
- **Submit** collection (when completed)

## Institution settings

- **OCLC symbol:** Verify that your OCLC symbol is selected here
- **MARC records:** Enable MARC record delivery to receive WorldCat records as output from data sync processing (optional)
  - Select record format
  - Select field for Local system number (LSN) from your records
  - Select how to include local bibliographic data in these records
- **Reports:** Enter one or more email addresses and select the data sync reports to receive. Once your files are processed, the output reports are delivered to the email address(es) entered here. Other reports and files are delivered to Metadata > My Files > Downloads.

General documentation about Bibliographic Collections is available [here](#).

## Bibliographic collection with Reclamation (scan/delete process)

A Reclamation synchronizes your library holdings with your WorldCat holdings. This is useful if your WorldCat holdings have not been consistently maintained and it would be difficult to isolate records that must be updated from your library collection or from WorldCat.

The steps in a reclamation include:

- Match your records to WorldCat records,
- Sets holdings on those records in WorldCat
- Adds a timestamp to these matching records
- Identify WorldCat records where holdings were set before the timestamp
- Cancel holdings on the identified WorldCat records

Considerations with the reclamation process:

- This is a one-time only project.
- There is a fee associated with this processing.
  - To request pricing information, please contact [support@oclc.org](mailto:support@oclc.org).
- Verify the date for the timestamp with OCLC staff before processing begins.
- If needed, request a report of titles where holdings will be removed in Comments
- Knowledge base holdings will be turned off briefly and then turned back on to ensure these holdings remain when the scan/delete process occurs.
- Online cataloging to set holdings through Connexion or Record Manager can proceed while the reclamation is underway; however, do not delete holdings online.

Refer to [Create a bibliographic collection for a reclamation](#) for details.

## Bibliographic collection for a group

A group data sync collection is needed when data is submitted for processing on behalf of multiple libraries in a single file. This consolidated set of records is often produced from a shared local system or from a shared processing center.

Each library in the group must have an OCLC institution symbol (the symbols are required for setting and canceling holdings accurately). Every group that creates a group collection must have an OCLC symbol for the group. This is used when creating the collection and for tracking data as it is processed. If your group does not have an OCLC group symbol, contact OCLC Customer Support for assistance.

Holdings information will be part of the bibliographic records in multiple 852 fields specifying each institution and their OCLC symbols.

Refer to the data sync collections for groups [checklist](#) for details about creating this bibliographic collection.

## Local Holdings Records (LHR) collection

A library may want to send their local item records to have OCLC create or update local holdings records (LHRs) on matching WorldCat bibliographic records. This collection accepts the MARC format for holdings (MFHD) or a spreadsheet of patterned data.

Every MFHD record or spreadsheet of patterned data must contain:

- A single valid OCLC control number (OCN) for the corresponding WorldCat bibliographic record
- The OCN must be consistently placed in all records, use field:
  - 004 - Control Number for Related WorldCat Bibliographic Record
  - 014 - Linkage Number with prefix in \$b OCoLC
  - 035 - System Control Number with accepted prefix \* (consult [documentation](#) for details)
- Location codes for 852 ‡a and ‡b
  - With valid OCLC symbol and holding library code combination
  - This information is used to build a translation table so correct holdings are set in WorldCat.

If your library plans to send a spreadsheet of patterned data for LHR processing, please note:

- There is a charge associated with processing non-MARC data
- A sample of your patterned data is needed for evaluation. This is to ensure that all required elements are present, and that this data can be processed successfully

Contact [support@oclc.org](mailto:support@oclc.org) to request pricing and learn how to submit your sample data

	A	B	C	D	E	F	G
1	LSN	OCLC No.	LHR 852 \$a	852 \$b	866 \$a	008/20	008/21
2	789321	10360340	RAO	RAOS	1-(1979-)	a	b
3	789654	8545506	RAO	RAOS	3-10(1918-1946)	b	a
4	789159	3350110	RAO	RAOS	1-7(1931-)	b	a
5	798357	30056065	RAO	RAOS	35-40(1994-1999)	a	b
6	798246	28755048	RAO	RAOS	10-24(1993-2007)	b	b

Data sync processing does not match individual holdings records.

If you have only one local holdings record attached to a bibliographic record, only one LHR will be processed. But, if there are multiple local holdings records attached to a single bibliographic record, and only one LHR has changed, the entire set of holdings records must be submitted for processing (not just the changed one).

General documentation about Local Holdings Records Collections is available [here](#).

## Shared print registration service

Libraries that participate in shared print programs may use LHR data sync collections to register and maintain this information for display in several OCLC products/services.

For more information, Consult the documentation:

[https://help.oclc.org/Metadata\\_Services/Shared\\_Print](https://help.oclc.org/Metadata_Services/Shared_Print)

With questions, contact OCLC support at: [support@oclc.org](mailto:support@oclc.org)

## Delete WorldCat Holdings (MARC or non-MARC data)

A delete WorldCat holdings collection accepts either MARC records or non-MARC data in the form of OCLC control numbers (OCNs) for processing.

If a file of MARC records is sent with this collection, holdings will be removed from all matching records in WorldCat.

A file of OCLC control numbers must include two columns of data:

Column A: labeled LSN (for local system number): Enter header, LSN, leave this column blank

Column B: OCNs (with OCoLC prefix)

	A	B
1	LSN	OCLC_Number
2		(OCoLC) 932576297
3		(OCoLC) 39197889
4		(OCoLC) 23236548
5		(OCoLC) 91898967
6		(OCoLC) 87965300
7		(OCoLC) 93257690
8		(OCoLC) 1414255
9		(OCoLC) 2326958
10		
11		
12		

The order of the columns must not be changed.

The data must be sent as a .CSV file, with these two columns. Save the file as CSV UTF-8 (comma delimited) and encoded as Unicode (UTF-8).

Refer to [Data requirements for non-MARC numeric search key collections](#) for other details and to review the numeric search key template.

General documentation about the Delete WorldCat Holdings Collections is available [here](#).

## Delete Local Holdings Records (MARC or non-MARC data)

LHR data sync will process MFHD records that contain, at a minimum, a valid OCLC control number and enough information to successfully translate local location codes into valid OCLC institution symbol and holding library code combinations in 852 ¤a and ¤b, respectively, of the WorldCat LHRs.

Every record submitted for your LHR data sync collection must contain a single valid OCLC control number (OCN) for the corresponding WorldCat bibliographic record.

Refer to [Data requirements for delete local holdings records collections](#) for other details.

General documentation about the Delete Local Holdings Records Collections is available [here](#).

## Collection Actions and Next Steps (for all data sync collections)

Once you have completed the appropriate data sync collection, click **Save**. This action creates the unique Collection ID, which is used in your filenames and it displays the **Comments** panel where you can add information about your data, your processing options, or other details.

Once your comments are entered, open the Collection Actions drop-down list, and choose, **Submit collection to OCLC**. This alerts OCLC that you are sending data for processing. Now it is time to prepare your data and send files to OCLC.

### Next Steps

1. Prepare your data: evaluate the data you plan to send for processing through the data sync collection. This may be files of MARC bibliographic records, a list of OCLC control numbers (OCNs), MARC format for holdings data (MFHD) for creating or updating local holdings records or a spreadsheet of patterned data so OCLC can create LHRs to add to WorldCat. Use the documentation at this [link](#) to review what to look for in your data.
2. **Name your files.** Each file name must be unique and must include:
  - *7-digit Collection ID* – Enter as first element of the file name, immediately followed by a period. This ensures that the file will be processed under the correct data sync collection.
  - *OCLC institution symbol* - Include as the second element of the file name, separated from the collection ID by a period.
  - Use the file extension based on data being sent:
    - a. MARC data files (Bib or LHR) should have the filename extension “.mrc”.
    - b. Non-MARC data files should have the file extension .csv, or .txt.
3. Upload your files through [OCLC file exchange](#) or through WorldShare Metadata [My Files](#).
4. OCLC will process your data per specifications in the data sync collections.
5. Retrieve output files and reports: Data sync reports contain information about records matched and delivered as a result of file processing. Some reports are available through the OCLC Usage Statistics and others through Metadata > My Files in WorldShare. Detailed information with samples of the different reports can be found [here](#).
6. Repeat these steps as needed to keep [WorldCat holdings](#) up to date.

### Support Resources

- **With questions, contact:**
  - **OCLC Customer Support:** <http://oclc.org/support>
    - 800-848-5800 or [support@oclc.org](mailto:support@oclc.org) (US)
  - **Attend Collection Manager Office Hours**
    - Tuesdays, 12:00 pm – 1:30 pm (US-ET)