Use the Digital Collection Gateway

Last updated: Thu, 18 Mar 2021 13:55:49 GMT

Find information about logging in to the Digital Collection Gateway and managing collection profiles, mapping metadata, previewing records in WorldCat, managing synchronization schedules, and reviewing reports of past synchronizations. After you have enabled WorldCat Sync on your CONTENTdm Server and have registered with the Digital Collection Gateway, you can log in to the Digital Collection Gateway and manage collection profiles, map metadata, preview records in WorldCat, manage synchronization schedules, and review reports of past synchronizations.

For more information, see the Using the WorldCat Digital Collection Gateway tutorial. (PDF)

Logging in and reviewing the collection list

After you have enabled WorldCat Sync on your CONTENTdm Server and have registered with the Digital Collection Gateway, you can log in to the Digital Collection Gateway and manage the harvesting of your collections with WorldCat.

You can access the Log In page through CONTENTdm Administration or by going directly to the Digital Collection Gateway.

Log in to the Digital Collection Gateway directly

1. Using a browser, navigate to http://worldcat.org/digitalcollectiongateway/Login.
2. Enter your Digital Collection Gateway user name and password and then click Sign In. The WorldCat Digital Collection Gateway Home page displays.

Log in to the Digital Collection Gateway from CONTENTdm Administration

1. Open CONTENTdm Administration.
2. Click the Server tab.
3. Click Settings. The Server Settings page displays. If the server had been registered with the Digital Collection Gateway, a Login link displays in the WorldCat Sync section of the page.
4. Click Login. The Digital Collection Gateway Login page displays.
5. Enter your user name and password and then click Sign In. The WorldCat Digital Collection Gateway Home page displays.

The Home page displays a list of all active and inactive collections on your CONTENTdm Server:

• Active collections: Collections enabled for WorldCat Sync. Active collections can have the following statuses:
  ◦ Enabled: Enabled for WorldCat Sync and has an approved Metadata Map and synchronization schedule.
  ◦ Disabled: Enabled for WorldCat Sync but no synchronizations are scheduled.
  ◦ New: Enabled for WorldCat Sync since you last logged in.
  ◦ Syncing: Synchronization currently in progress for this collection.
• **Inactive collections**: Collections that were previously enabled for WorldCat Sync, but are currently disabled in CONTENTdm Administration server settings. (Inactive collections can be activated by re-enabling them for WorldCat Sync in CONTENTdm Administration.)

To access the collection profile, click the Collection Profile **View** link. To edit the metadata map for a collection, click the **Metadata Map Edit** link.

### Mapping metadata

The WorldCat Digital Collection Gateway enables you to map how your collection metadata appears in a WorldCat.org preview. You can adjust how records display in the WorldCat item detail and search results views. You can also view and map records in a MARC record preview. As you adjust how records appear in the different views, you are creating a map that affects how the entire collection is processed by the Gateway. In other words, changes to the map in one record affect all records in the collection. Likewise, changes to the map in one view affect all the views (WorldCat item detail, WorldCat search results, and MARC). The Metadata Map is saved as part of the Profile for each collection.

When you choose to edit the metadata map, the Digital Collection Gateway harvests metadata from the CONTENTdm Server and maps it. The records are then displayed for review. As you review and edit the map, the changes are checked to ensure valid MARC records. (Records are never loaded to WorldCat until you approve the map you have created.)

Note: We recommend you use the Qualified Dublin Core template, the Gateway's default setting for CONTENTdm sites, in your collections to facilitate metadata mapping with WorldCat.

After your metadata map is adjusted to your satisfaction, you approve it and your first synchronization with WorldCat begins. The Gateway's default schedule for synchronizing collections is once per quarter, but you can adjust this using the Sync Schedule. For more information, see [Scheduling uploads](https://help.oclc.org/Metadata_Services/CONTENTdm/CONTENTdm_Administration/WorldCat_sync/Use_the_Dig…).

### Accessing the Metadata Map

The Digital Collection Gateway enables you to edit the metadata map through record previews. Click the Metadata Map **Edit** link for any Active collection. A progress screen may display as the map is loaded. The WorldCat Item View displays by default.

### Selecting a Metadata Map template

The first time you edit the metadata map for a collection, you can select a Metadata Map template. When you click the Metadata Map Edit link, the Select Metadata Map dialog box displays the template options of the **System Default Template** or the metadata map for another previously edited collection. Any changes you make to the Metadata Map affect only the current collection. In other words, changes you make to the Metadata Map for this collection do not propagate to other Metadata Maps.

Note: You can also choose a new metadata map template later by selecting **Reset Metadata Map** while on the Metadata Map Edit page.
Mapping metadata

The Digital Collection Gateway provides several ways to edit the metadata map. Map changes are validated as you make them.

For each displayed field, you can perform the following mapping changes by clicking on the yellow box surrounding the field and selecting from the drop-down list. Each change you make to the map affects how all records in the collection are mapped.

- **No mapping** — If you click No Mapping from the drop-down list, the current field is removed from the map. The metadata is not deleted from your CONTENTdm Server. The metadata is ignored as it is synchronized with WorldCat.
- **Replace** — If you select another source metadata field from the drop-down list and click Replace, the currently displayed metadata field is replaced with the newly selected metadata field.
- **Add** — If you select another source metadata field from the drop-down list and click Add, you will add the newly selected metadata field to the current position in the display. (Some elements of the WorldCat Item View, WorldCat Search View, and MARC View do not allow multiple fields to be displayed at once so your change may not be visible in the current view.)

To see more mappable fields in any display, click the More drop-down list at the top of the page, then select **Show Unmapped Fields**. A template record with additional mappable fields will be displayed on your source metadata. Each of the template record fields show up as metadata surrounded by a blue box. Click on the blue boxes to edit the mappings, the same way you would for other fields. To hide the template, click the More drop-down list at the top of the page, then select **Hide Unmapped Fields**.

You can edit the metadata map using any of the different views of the data and your collection: WorldCat Item View, WorldCat Search View and MARC view. You also can use the Collection-Wide Metadata Viewer, which provides a way to evaluate how frequently fields are used in this collection on your CONTENTdm server.

Each change you make to the map is immediately saved to the map. To undo all changes made to a map within a session, click **Cancel**. Or, save changes to work with later by clicking **Finish Later**.

You can restore the default map and remove any mappings you have made in the past by clicking the **Restore Default Map** link. In this dialog, you can select a metadata map template from a drop-down list.

To save changes, approve and sync, click **Approve Map & Sync**.

Navigating the Preview of Your Collection

While editing the Metadata Map, you can navigate through each record in your collection using either the grey arrows above the preview image, the navigation slider for relative movement in the preview of your collection, or by using the **Go to Record** option to navigate directly to a specific record.

Using the WorldCat Item View

The WorldCat Item View displays by default when you click the Metadata Map **Edit** link from the Digital Collection

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https://help.oclc.org/Metadata_Services/CONTENTdm/CONTENTdm_Administration/WorldCat_sync/Use_the_Dig…

Printed: Wed, 16 Mar 2022 20:35:03 GMT
Gateway Home page. The item view is a preview of what the item's detailed display would look like in WorldCat, after a user discovers the item in search results and clicks to see more information.

The yellow, highlighted boxes show editable metadata mappings. Click to edit the mappings.

Use the **Edit Mapping** drop-down list to review and select mappings. The list displays the field name, as well as the contents of the field for the current record.

After you select a mapping, you can choose to add the selected field to the mapping, or replace the current mapping with the newly selected field. The WorldCat Item View updates to show the edited mapping, and the mapping change is applied to all records in the collection.

To unmap a field, click the yellow highlight box and select "No Mapping" from the **Edit Mapping** drop-down list. Click Replace. The mapping for this metadata field is removed across all records and all views.

You can also open a more accurate preview of the record without the highlight boxes by clicking the **Open Preview in Separate Window** link.

**Material Type Mapping**

You can use a wizard to assign the material type of each item in your collection to the material type icon and text in the **Edition/Format** field of the WorldCat Item View. To use the wizard, click the material type icon in the WorldCat Item View.

The Change Material Type Key window displays.

Following the steps in the wizard, you first select a Dublin Core Field from your collection's metadata that will be used to determine each item's material type. After you've selected a Dublin Core Field, the contents of this field for every item appear in the **Field Contents** column in **Step 2**. You can select a different material type for each value by double-clicking the associated value in the right column and selecting the new material type. Click **OK** to save changes and close the window.

**Record Validation (Online)**

Each record that is harvested for the preview is run through a MARC record validator. The validation status is displayed in the lower-right of the Viewer.

Use the arrows in the upper-right and upper-left to navigate items in the collection.

**Using the WorldCat Search View**

Access the WorldCat Search View by clicking the Metadata Map **Edit** link from the Digital Collection Gateway Home page, and then clicking the **WorldCat Search View** tab. The search view is what the user would see as a brief search result for the item, when metadata matches a WorldCat search query. (The thumbnail also would display in search results.)

Metadata mappings can be edited in the same way they are edited and previewed using the **WorldCat Item View**.
Using the MARC View

Access the MARC View by clicking the Metadata Map Edit link from the Digital Collection Gateway Home page, and then clicking the MARC View tab. The MARC View displays what happens in the background when the source metadata is translated to a MARC record.

Note: Fixed fields are not adjustable and display as an "Internet Resource, Monograph" in WorldCat.

Metadata mappings can be edited in the same way they are edited and previewed using the WorldCat Item View.

Analyzing the Source Metadata

The Gateway provides two tools that help you analyze the metadata for your collection: Dublin Core Summary and Frequency Analysis. To view the contents of each of the fields in your collection, click the More drop-down list at the top of the page, then select Open Dublin Core summary in new window. To view a Frequency Analysis of the metadata field names from your collection, click the More drop-down list at the top of the page, and select Open Frequency Analysis in new window.

Approving the Map

After you have edited the metadata map, you can approve the map and synchronize your collection with WorldCat from the Edit Metadata Map page.

To approve the metadata map

On the Edit Metadata Map page:

1. Click Approve Map & Sync. A confirmation dialog displays. Click OK to save the approved map in the Profile for this collection and to start synchronizing the collection. A progress dialog displays.
2. The Digital Collection Gateway Home page displays, with the collection’s Next Sync time updated, as the collection is harvested from the CONTENTdm Server and loaded into WorldCat.

Depending on the size of the collection, your changes will display in WorldCat as the synchronization completes.

After the synchronization completes, a WorldCat Sync Report is available in the Reports section of the Digital Collection Gateway (for more information, see Reviewing Reports). You can now synchronize the OCLC numbers from this synchronization into your CONTENTdm collection using CONTENTdm Administration. For more information, see Update collections with OCLC numbers.

Accessing and managing the collection profile

After you have enabled collections on your CONTENTdm Server for WorldCat Sync and have registered with the WorldCat Digital Collection Gateway, those collections that you enabled have a profile. The profile is a collection of settings and information, including record processing, synchronization details, and metadata mapping.

When you view the collection profile, you view:
• **Collection Details**
  - **Collection Identifier.** The CONTENTdm collection alias.
  - **Collection Display Name.** The display name for the collection in CONTENTdm.
  - **Active.** Whether the collection is enabled for WorldCat Sync on the CONTENTdm Server.

  - **WorldCat Record Processing.** How the collection records will be processed as they are uploaded to WorldCat. You can choose from two modes:
    - **Replace All:** This is the Gateway's default processing mode. Each time the Digital Collection Gateway harvests the collection metadata to synchronize with WorldCat, all records are updated. All items that are edited, added or deleted will be edited, added or deleted in WorldCat. All previous records are overwritten with each harvest. Recommended if you are using CONTENTdm for metadata editing.
    - **Add New Only:** Only new records are harvested. No existing WorldCat records are updated. Recommended if you use WorldShare Record Manager as your primary method of editing records. In this workflow, "seed" records are uploaded from CONTENTdm and updates are performed on the records using Record Manager.

To change the **WorldCat record processing** setting select a setting, then click **Save.** The page refreshes, displaying the new setting selection.

• **OCLC Symbol.** The OCLC institution symbol that will be associated with each record uploaded to WorldCat. This OCLC symbol is used to identify the "cataloging institution" in the WorldCat record and to identify the "holding institution" in WorldCat. The OCLC symbol value is initially set to the OCLC symbol used when registering with the Gateway. You can look up OCLC symbols at www.oclc.org/contacts/libraries.

  Note: You cannot edit the OCLC symbol for this collection after the collection is sync'd with WorldCat the first time. You can only edit the OCLC symbol before the initial synchronization.

• **Include collection-level record in WorldCat**
  - **Yes:** If you've created a WorldCat Sync collection-level record for this collection in CONTENTdm Administration, this record is uploaded to WorldCat.
    - Note: The Digital Collection Gateway uses a common, Qualified Dublin Core to WorldCat metadata map for all collection-level records. You cannot modify the mapping using the Gateway.
  - **No:** No collection-level record is uploaded to WorldCat.
  - **Preview:** You can also see what the collection-level record will look like in WorldCat by clicking the Preview link.

• **Sync Details**
  - **Last Scheduled Sync.** The last time the Digital Collection Gateway harvested collection metadata and synchronized it with WorldCat.
  - **Next Scheduled Sync.** The next scheduled time that the Digital Collection Gateway will harvest collection metadata and synchronize it with WorldCat.
  - **WorldCat Syncs Frequency.** The scheduled frequency of harvesting. Default is once a quarter. The frequency can be as often as monthly or as infrequent as once a year. You can also choose immediate synchronization which doesn't affect any scheduled synchronizations.
  - **Latest Sync Status.** Provides a link to a report of the latest synchronization, if one exists.
  - **View Sync History.** Provides a link to the Reports page.
  - **Edit Sync Schedule.** Provides a link to the Sync Schedule page. The link displays only when the collection has an approved map and a sync schedule established.
For more information about synchronizing, see Scheduling uploads.

- Metadata Map
  - Approved for WorldCat Sync. Displays whether the metadata map has been approved. The Edit Metadata Map link provides access to view how source records are displayed in WorldCat.

For more information, see Mapping metadata.

Access the collection profile

Each collection in the Active Collections list has a Collection Profile. To view the Collection Profile click the View link for the Collection Profile next to any Active Collection.

Scheduling uploads

After your metadata map is adjusted to your satisfaction, you approve it, and your first synchronization (or upload) with WorldCat begins. An initial synchronization schedule for your collection is set at once per quarter, but you can adjust this using the Sync Schedule.

Accessing the Sync Schedule

After you have approved the metadata map, the Digital Collection Gateway Collection List displays a date for the next scheduled synchronization with WorldCat. This link helps you navigate to the Sync Schedule page.

1. From the Collection List on the Digital Collection Gateway Home page:
2. Click the Sync Schedule date for the collection. The Sync Schedule page for the selected collection displays.

Viewing Status

The Sync Schedule page provides the date of the last time the collection was harvested and synchronized with WorldCat, as well as the time of the next scheduled synchronization.

A Last Sync date does not display if the collection has never been synchronized.

Managing the Sync Schedule

The Digital Collection Gateway automatically synchronizes with your CONTENTdm collection quarterly by default (if the collection has been enabled and the metadata map has been approved). You can set your collection to synchronize at other regular intervals, on a specific date, or you can choose to start a synchronization immediately (i.e., ad-hoc sync).

Synchronizing with WorldCat Immediately

Starting an immediate synchronization does not save or change the sync schedule. For example, if you have a scheduled synchronization planned for tomorrow, an ad-hoc, immediate sync today would harvest your collection and
synchronize it with WorldCat, and the scheduled sync would start tomorrow.

1. From the Sync Schedule page, click **Sync with WorldCat Now**. The Collection List page displays and the collection status is updated to “Syncing.” (You can click Refresh List to check for updated status.)

**Changing the Sync Schedule**

Synchronizations are scheduled quarterly by default.

1. From the Sync Schedule page, select a new interval for synchronization or select a specific date for the next synchronization by entering a date (mm-dd-yyyy format) or by clicking the calendar icon and choosing a date from the calendar view.
   
   Note: Specifying a date does not change the default interval for future synchronizations.

2. Click **Save** to save the change. The change is saved and the Collection List page displays, with the Sync Schedule date updated for the selected collection.

**Reviewing WorldCat Sync Reports**

After your collection metadata has been synchronized with WorldCat, you can view and download the WorldCat Sync reports, which capture what happened when your collections were harvested by the Digital Collection Gateway, mapped, and uploaded to WorldCat.

Reports provide information about settings, start and end times of the synchronization, processing summary information, errors, and the OCLC record numbers that were added or replaced.

Reports can be viewed in HTML format. Reports can be downloaded in XML and Microsoft Excel formats.

**Access WorldCat Sync reports**

After you've successfully logged-in to the Gateway click **Reports** from the navigation menu at the top of the page. The Reports page displays.

The Reports page has features to help you navigate your reports easily for many collections. Each column of the Reports page can be sorted by clicking on the sort bar at the top of the column. Additionally, you can filter the report display by report type, collection name, or date. To remove the filters, delete the contents of any filter fields you set at the top of the page.