WorldCat data sync collections for groups checklist

Last updated: Tue, 16 Nov 2021 21:43:16 GMT

The WorldCat data sync collections for groups checklist provides an overview of the group data sync collection creation process.

Introduction

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.

The data sync processing options for groups differ slightly from single-institution processing options. Outlined here are the differences to note when creating a WorldCat data sync collection for a group.

• You cannot delete a collection once it has been saved and/or submitted.
• If you have questions while creating your collection, you can:
  ◦ Contact the database specialist assigned to your collection using the Comments accordion
  ◦ Contact OCLC Support
  ◦ Attend Collection Manager office hours

Sign in to WorldShare Collection Manager

To begin, obtain a WorldShare custom Web address under the OCLC group symbol rather than an OCLC institution symbol for a single library in the group. This ensures that the group data sync collection is distinguished from data sync collections that a single institution in the group may create.

WorldShare URL: ____________________________________________
(under group symbol)

WorldShare user name: ______________________

WorldShare password: ______________________
Obtain a WorldShare custom Web address

To obtain a WorldShare custom web address, you will need to create a Collection Manager account for your group OCLC symbol if you don't already have one.

Complete these values pertinent to a group data sync collection

• Click **Properties** to open the panel.

• Select whether this is a collection for a **Group**: Yes or No
  Note: Select **Yes** if data from multiple institutions will be sent under this collection. This creates another tab in the Bibliographic Records Information panel specific for Groups.

• Enter information in **Contacts** if more information needs to be conveyed about this data or collection.
  ◦ OCLC needs a primary contact (usually the person who creates the collection) for communications about the data and the processing.

• Enter **Comments** if more information needs to be conveyed about this data or collection.
  ◦ The comments accordion allows you to communicate with the database specialist assigned to your data sync collection. It appears after you save your collection for the first time. Database specialists can also communicate with you about your collection
  ◦ OCLC may use Comments throughout the translation table creation process.

• Click **Bibliographic Records Information** to open the panel.
  ◦ Complete the **System** and **Processing** tabs.
    • Add locations for the OCLC control number and the Local System number.
    • Set values for WorldCat staging; language of cataloging and excluded information.
  ◦ Complete the **Groups** 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.

• **Symbol Used for Adding Records to WorldCat**
  1. **OCLC group symbol** is the default; OCLC recommends using this group symbol.
     OR
  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.

• **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: ________________________

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.
- OCLC gathers the unique identifiers from this specified Tag/subfield and builds a table that "translates" these unique identifiers into corresponding OCLC institution symbols to set or cancel holdings accurately for each member of the group.

- Group Bibliographic Translation Table status
  - This table is created by the OCLC database specialist assigned to your collection and sent to the group administrator for review and approval; the status of this creation and review is indicated by the values: The status values are updated by OCLC staff throughout the review process. Translation Table changes (additions / deletions of group members) are done through Comments / or email correspondence between the Group Administrator and OCLC staff.
    - **In Progress (default)** - Collection has been created but not yet submitted
    - **Submitted** - Collection has been submitted for processing files
    - **Being Reviewed** - Collection has been received and is being reviewed
    - **Accepted** - Collection has passed review and file processing begins
      Note: Once your initial collection has been accepted, this status remains for all subsequent file submissions.

### Submit collection

When all panels have been completed, select **Submit Collection to OCLC** from the Collection Actions drop-down menu.

Note the **Collection ID**: ____________________________

### Review

1. Set up a WorldShare account under OCLC Group Symbol.
2. Create a data sync collection and identify the type of data to be sent.
3. Complete the Properties panel and indicate that this collection is for a Group.
4. Complete the Bibliographic Records Information panel.
   - Under the Group tab, indicate the location of the library identifiers in your records.
5. Complete the Contacts panel and add information to Comments if needed.
6. Submit the Collection and note the Collection ID for future reference.