

Publishing to OCLC

Background

Procedures/Recommendations

1. Setting up WorldCat Data Sync Collections (WorldShare Collection Manager)

Obtain a Collection ID from OCLC

This collection is used to set holdings, delete holdings, or both – by either changing the Collection Type (from “Bibliographic” to “Delete WorldCat Holdings” – to delete holdings for all), or setting the “Use Record Status for Processing” radio button to “Yes” for a Bibliographic collection. The “Yes” setting will set or cancel holdings for a specific library based on the Record Status value in the incoming records. Libraries can create an additional collection, if needed, to process deletes and set holds separately.

[Data Sync Collections in Collection Manager](#)
[How to Synchronize Holdings between OCLC and Alma](#)

Here's a brief outline on filling out the online form to obtain an OCLC collection ID for use with Alma.

First, libraries need to have a WorldShare Collection Manager account. Sign into WorldShare Collection manager.

Select the "Metadata" tab and select "Create a collection"

Collection type -- Data Sync Collection

Data Sync Type -- Bibliographic

Select "Create" button.

Properties:

Collection Name -- Insert a name for your collection (e.g., Alma)

Group -- No

WMS Library -- No

Collection type -- Bibliographic

Original Data Format -- MARC

Use Record Status for Processing -- YES

Bibliographic Record Information

Initial estimate for record count (e.g., 1,000)

System Tab

Provider -- Ex Libris
System name -- Alma
Version – [Leave field blank]
OCLC Number Location -- 035 |a
Local System Number Location -- 001

Processing Tab

Limit added records to WorldCat staging -- Yes
Replace records in WorldCat -- No
Use Language of cataloging (040 |b) field from records --Yes
Excluded information for fixed fields – [Leave blank]

Local Bibliographic Data Information

N/A

MARC Record Output Information

Enable MARC Record Delivery -- No

Comments

N/A

Contact Information

Enter contacts (2 or 3 individuals) as contacts for this collection/service.

Click on Save Progress or Submit Collection. Once you click on either button a collection ID will be created and should display toward the top and or side of the screen.

- Once you submit the Data Sync collection, an OCLC database specialist will be assigned to your collection.
- **Ensure that the OCLC database specialist confirms the collection status as “Accepted.”**

2. Configuring Alma

The following instructions were modified by OCLC to assist Alma customers with the recent Batchload migration to WorldShare Collection Manager as related to Data Sync Collections.

Profiles Available for OCLC

1. Synchronize local holdings with OCLC: exports and sends the MARC Format for Holdings Data (LHR) record. For this type of project, you would have ordered a Local Holdings Record Collection in WorldShare Collection Manager.

2. Synchronize bibliographic records with OCLC*: exports and sends the full MARC bibliographic (BIB) record to maintain WorldCat holdings at the OCLC Institution symbol level. For this type of project, you would have ordered a Bibliographic Collection in WorldShare Collection Manager. (Most generally used profile)

*If the purpose of your project is to set (or delete) holdings in WorldCat for every matching record found you should choose: "Synchronize bibliographic records with OCLC." (See **Update the Publishing Profile in Alma** below)

Define an FTP Connection in Alma

Alma Configuration > Configuration Menu > General > External System > S/FTP Connections

SFTP Connection Details

In your Alma profile, make the following selections for Update S/FTP Connection.

- Enter the [host name](#) associated with your OCLC file exchange account for Server.
- Enter **22** for Port.
- In the Sub-directory text field:
 - Enter **/xfer/metacoll/in/bib** for a bibliographic data sync collection.
 - Enter **/xfer/metacoll/in/lhr** for a local holdings records data sync collection.
- Select the **Is full path** checkbox.
- Leave the Max. Number of Files text field blank.
- Enter **1** for Min. Number of Files.
- Choose the **largest option** for Max. file size.
- Select **MB** for Size type.
- Select **True** for Allow Navigation.
- Select **Default** for Ftp Server Type.
- Leave the FTP passive mode checkbox deselected.
- Select the **Ftp Server Secure** checkbox.
- Select the **Username/password authentication** radio button for Authentication method.
- Enter your [OCLC file exchange account username](#) for UserName.
- For Password, please call [OCLC Support](#) to obtain file exchange account credentials for your institution.

*Special characters (@, \$ and #) in symbols will act as 'command control codes' which will halt processing. If you have a special character in your OCLC institution symbol, please convert it as follows:

Update the Publishing Profile in Alma

Alma > Resources > Publishing > Publishing Profiles

Profile Details

§ Profile Name:	'Synchronize bibliographic records with OCLC'
§ OCLC Institution symbol:	use institution symbol
§ Project ID:	leave this box blank
§ Collection ID:	use your Data Sync Collection ID

Submission Format

§ FTP configuration:	scp.oclc.org
§ Sub-directory:	blank
§ Status:	defined by operator
§ Scheduling:	defined by operator

- Change Status to "Active".