Using the WorldCat Digital Collection Gateway with CONTENTdm

This tutorial leads you through the steps for configuring your CONTENTdm collections for use with the Digital Collection Gateway and using the Digital Collection Gateway to create WorldCat records from your CONTENTdm metadata records. To successfully complete this:

- The CONTENTdm Server must be running with one or more collections enabled for WorldCat Sync.
- The collections enabled for WorldCat Sync must have metadata fields mapped to Dublin Core.

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- Considerations for sharing metadata

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- Analyzing the collection metadata
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Section 1: Overview

The WorldCat Digital Collection Gateway enables you to synchronize your CONTENTdm metadata item records with WorldCat records, expanding access to your digital items to users around the world via WorldCat.

To accomplish this, the Gateway transforms a CONTENTdm metadata record to the WorldCat.org interface. With its graphical interface, the Gateway does not require detailed knowledge of the MARC or Dublin Core standards. You simply need to know the metadata in your collection, and how you’d like the metadata to appear in a WorldCat display.

The Gateway harvests Dublin Core metadata from your CONTENTdm collections, transforms the Dublin Core metadata to MARC, and displays a WorldCat Item View. You can then make changes to the WorldCat.org display, and the Gateway makes the necessary changes to the metadata in the background. This transformation is called metadata mapping, or just mapping. After you have completed a mapping for a collection, it is saved and can be used again with that collection.

When the mapping is completed and approved, the metadata records are loaded into WorldCat and the OCLC numbers for each item are returned to CONTENTdm where they can be added to the metadata records.

Over time, as you add new items to your collections and make changes to your item metadata, you can use the Gateway to schedule ongoing synchronizations. Synchronizations can be set up in one of two ways:

- Only new items (since the last synchronization) are added to WorldCat
- Or new items are added, and existing records in WorldCat are updated with any changes made to the CONTENTdm metadata records

In this tutorial, we will use the Gateway with an image collection. We will:

- Set up a collection’s metadata to work with the Gateway
- Enable the collection to work with the Gateway
- Transform the metadata records to the WorldCat.org display
- Edit the WorldCat.org display
- Sync the collection records with WorldCat
- Schedule later synchronizations
- View the Gateway’s Sync Report for the collection
- Complete the process by adding OCLC numbers to the CONTENTdm metadata
Section 2: Collection Configuration and Metadata Crosswalking

When working with the Gateway, you are using technology that facilitates metadata mapping between Dublin Core and the WorldCat.org display. The Gateway is not a cataloging or metadata creation/editing tool. As such, the quality of the WorldCat records that the Gateway generates for your digital items depends on: 1) the collection metadata configuration and creation standards, and 2) the nature of Dublin Core and MARC standards.

Metadata configuration and creation

The nature of the WorldCat records depends on the way you have set up and implemented your metadata for your collections. The following CONTENTdm-specific practices will help ensure the best metadata mapping and WorldCat records.

1) For all fields that you want to display in WorldCat, configure the metadata fields in CONTENTdm so that those fields are mapped to an appropriate Dublin Core field. You can use Simple Dublin Core and Qualified Dublin Core. We recommend using Qualified Dublin Core for the best mapping results. The Gateway only gathers and understands metadata elements that have been mapped to Dublin Core. When you configure metadata for your collections, make sure to map all elements that you want available for mapping in the Gateway.

2) Date fields should use consistent date formatting.

3) Note that metadata fields set to hidden in CONTENTdm are not available for use with the Digital Collection Gateway.

4) If you opt to make a field non-searchable in CONTENTdm (i.e., you set the searchable property to "No") and map that field into the Digital Collection Gateway, the field will be searchable in WorldCat.org.

5) Digital Collection Gateway is programmed to handle repeating fields with the following caveat: Repeating fields (albeit those with distinct field labels), if mapped to a single Dublin Core element, are not treated uniquely in the Digital Collection Gateway. For example, two Publisher fields (e.g., Publisher-Original; Publisher-Digital) are mapped to dc.Publisher. In the WorldCat.org display, the user is given the option to map a unique field (e.g., Publisher-Digital) to an alternative field (e.g., All Authors/Contributors). At present, field values for each unique field (Publisher-Original; Publisher-Digital) would be carried together into the alternative field (All Authors/Contributors).

6) The Best Practices for CONTENTdm Users Creating Shareable Metadata may provide further guidance for setting up your collection metadata for use with the Gateway. You may access this document on the CONTENTdm User Support Center.

Considerations for sharing metadata

As you begin to review your collections in the Gateway, you’ll begin to notice a few things about sharing metadata between systems:

1. There are some metadata elements that are useful in your local CONTENTdm collection that do not have any context or meaning in WorldCat. For example, your CONTENTdm metadata may include a note on physical location of the original, such as *Original on 3rd floor stacks in the Henburg Library*, which may not be appropriate for the WorldCat.org display.
2. There are some metadata elements that are not necessary in your local CONTENTdm collection but provide essential context and meaning for users of WorldCat who discover your item. For example, it may seem obvious to an end user searching a CONTENTdm collection titled “Theodore Roosevelt Collection” that an item with a title “At the Gateway to Yellowstone Park” is referring to Roosevelt. However, this context will be missing to a WorldCat.org user.

3. Create complete and consistent metadata records to ensure complete and consistent WorldCat.org displays.

In this tutorial, we will be working with a small, sample collection of images, the Gateway collection. The metadata configuration uses Qualified Dublin Core, while the local field Location has been left unmapped because it would not be helpful to the end user. The OCLC Number administrative field has been set to be Searchable.
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Metadata fields
View and configure collection and administrative fields.

Collection field properties
View, add, edit and delete fields. Enable full text searching and controlled vocabulary. After you have added, changed, or deleted fields, index the collection to update changes.

<table>
<thead>
<tr>
<th>Field name</th>
<th>DC map</th>
<th>Data type</th>
<th>Large</th>
<th>Search</th>
<th>Hide</th>
<th>Required</th>
<th>Vocab</th>
<th>add field</th>
</tr>
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<td>No</td>
<td>No</td>
<td>No</td>
<td>move to</td>
</tr>
</tbody>
</table>

Field name | DC map | Data type | Large | Search | Hide |
----------------------|--------|-----------|-------|--------|------|
Archival file         | None   | Text      | No    | Yes    | edit |
OCLC number           | None   | Text      | No    | Yes    | edit |
Title                 | None   | Date      | No    | Yes    | edit |
Date modified          | None   | Date      | No    | Yes    | edit |
CONTENTdm number      | None   | Text      | No    | Yes    | edit |
CONTENTdm file name   | None   | Text      | No    | Yes    | edit |

Figure 1: Collection metadata configuration

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A metadata record for an item in the Gateway collection is below. The record is minimal and will therefore result in a minimal WorldCat.org display.

![Sample metadata display in CONTENTdm](image)

**Figure 2:** Sample metadata display in CONTENTdm
Section 3: Enabling WorldCat Sync from CONTENTdm Administration

To enable WorldCat Sync in CONTENTdm Administration, you must have server permissions to add collections, delete collections, or administer user rights.

Step 1: Access and view the server settings

1. Open CONTENTdm Administration.
2. Click the Server tab.
3. Click Settings.

Step 2: Configure WorldCat Sync settings for the Gateway collection

1. Under WorldCat Sync, click Edit.
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2. Click Yes to enable WorldCat Sync. A list of collections displays.

3. Enabling WorldCat Sync makes selected collections available for the Gateway to work with. It does not begin the mapping and loading to WorldCat process. You may choose to enable WorldCat Sync for all your collections, or for selected collections. To enable WorldCat Sync for all your collections, click All.
Figure 6: Enable all collections for WorldCat sync

4. To enable selected collections for WorldCat Sync, select Yes from the drop-down menu for each collection you want to enable.
Step 3: Create collection descriptions for enabled collections

Create a collection description for collections for which you want a collection-level record created and loaded into WorldCat. The collection-level record can be loaded in addition to the metadata records for each item in your collection.

From the WorldCat Sync Settings page:

1. Click Add. The Collection description page displays.
2. Create the collection-level metadata record.
3. When done, click **Save** to save the record.

After you create and save the collection-level metadata record, you can make further edits to it by returning to the WorldCat Sync Settings page and clicking **Edit**.

**Step 4: Complete WorldCat Sync settings**

On the WorldCat Sync Settings page:

1. Click **Save**. This will return you to the Server Settings page.
2. If you have not yet registered with the Gateway, you will be prompted to register.
If you have already registered, you will be returned to the Server Settings page and will see a Login link to the Gateway.

**Step 5: Register with the Gateway (first-time users only)**

From the Server Settings page:

1. Click the Register button to navigate to the Gateway registration page.

The registration page will automatically complete the Repository URL and CONTENTdm License Key fields.
2. Enter your e-mail address.

3. Create a user ID and password. The password must be at least three characters long. You will use these to log in to the Gateway.

   **Note:** If you have an existing user ID and password with WorldCat.org associated with the e-mail address you entered above, you should enter your WorldCat.org user ID and password so the Gateway can be added to that user account. Only one user account is permitted for each e-mail address.

4. Enter your organization’s OCLC symbol. This symbol is used to associate your organization with the records loaded to WorldCat. (For information about assigning an OCLC symbol per collection, see Step 4)


5. Enter a phone number.

6. Create a name for your Repository.

7. Click the **Register** button to complete your registration.

   If your browser blocks pop-up windows, it will return to the CONTENTdm Administration WorldCat Sync Settings page.

   If you browser does not block pop-up windows, a new browser window will open, displaying the Gateway.

   **Note:** Only one user account (user ID and password) is assigned per CONTENTdm Server.

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**Section 4: Working with the Digital Collection Gateway**

**Step 1: Navigating the Gateway interface**

You can log in to the Gateway directly at [https://worldcat.org/digitalcollectiongateway/login.jsp](https://worldcat.org/digitalcollectiongateway/login.jsp).

Or, you can log in via CONTENTdm Administration:

1. From the CONTENTdm Administration Server Settings page, click **Login**.
2. Log in with the user ID and password you created when you registered with the Gateway.

After logging in, you will be on the Home tab. As the Gateway logs you in, it is contacting your CONTENTdm Server to get the list of currently enabled collections from the WorldCat Sync section of CONTENTdm Administration.

From the Home tab, you can view a list of your new, active and inactive collections, view collection profiles, and edit metadata mapping.

- **New** collections are collections that have been enabled in the WorldCat Sync section of CONTENTdm Administration since the last time you logged into the Gateway.

- **Active** collections are collections that have active metadata maps and/or synchronizations with WorldCat.

- **Inactive** collections are collections that the Gateway is aware of, but are not being actively synchronized. These collections were enabled at one time in the WorldCat Sync section of CONTENTdm Administration, but they have been subsequently disabled. Click **Delete** to delete the collection profile.
The Reports tab provides you with reporting on your synchronizations.

The Manage Account tab enables you to change the e-mail address, phone number and password associated with your Gateway account.

The Keys and Repositories section of the My Accounts tab is advanced and not needed by the majority of CONTENTdm users who use the Gateway to synchronize metadata between a single CONTENTdm Server and WorldCat.

If you want to use the Gateway with more than one metadata repository (CONTENTdm and/or non-CONTENTdm), you can use the Manage Account tab to add and manage license keys and repositories. (Please note that support for metadata repositories other than CONTENTdm 5.2 or later is currently in the pilot phase. Contact Support@oclc.org for further information.)

**Note:** The Keys and Repositories features are for current pilot project participants. If you are a CONTENTdm user who has registered only their CONTENTdm Server for use with the Gateway, please disregard this functionality.

**Step 2: Setting up WorldCat record processing**

Before starting to map metadata, we need to set up the type of record processing we want to use for this collection.

1. From the Home tab, click **View Collection Profile** for the collection with which you want to work. We are viewing the profile for the Gateway Images collection.

   The Collection Profile provides information about the selected collection, its synchronization schedule and history, and the status of its metadata map.

   There are two options for WorldCat record processing: **Replace All** and **Add New Only**.
2. Select **Replace All** to have the Gateway update records from this collection that are already in WorldCat and add new item metadata records to WorldCat.

In other words, if you have modified an item's metadata record in CONTENTdm, and there is a matching record for the item in WorldCat, the modifications made to the CONTENTdm record will be made to the WorldCat record.

To summarize, **Replace All** takes the following actions in WorldCat:

- Adds new item metadata records that are in CONTENTdm but not in WorldCat.
- Updates item-level metadata records already in WorldCat with any modifications made during editing in CONTENTdm.

3. Select **Add New Only** to have the Gateway ignore records that are already in WorldCat, and only add new CONTENTdm item metadata records.

4. After selecting the appropriate processing option for this collection, click **Save** to save your selection.

5. For the Gateway collection, Replace All has been selected as the processing method.

**Note:** If you are unsure which processing to use, selecting **Add New** is the more conservative approach.

**Note to users of Connexion digital import:** The Gateway is designed to ignore WorldCat records that have been used with Connexion digital import. Regardless of which processing option chosen, WorldCat records replaced via Connexion digital import will not be updated.

**Note to users of the previous WorldCat Harvesting Program:** If you have existing records in WorldCat from the WorldCat Harvesting Program and select Replace All, the Gateway will replace the existing records in WorldCat with your current CONTENTdm metadata.
6. Indicate whether or not you want the Gateway to include your collection-level metadata record in WorldCat. The collection-level record does not use the metadata map you set up for the collection; it uses the default system map.

![Collection Details]

Figure 14: Include collection level record in WorldCat

7. Click **Preview** to preview the collection-level record as a WorldCat display.

![WorldCat Preview]

Figure 15: Preview collection level record

**Step 3: Assigning an OCLC symbol to a collection (support for multiple organizations and consortia)**

If your organization uses CONTENTdm as part of a group, you may set holding on the WorldCat records to indicate that an individual organization (not the entire group) is responsible for the digital item and the WorldCat record. The Gateway provides this functionality by allowing you to indicate which OCLC symbol you want to have associated with the records in WorldCat for each CONTENTdm collection.

**To set an OCLC symbol for a particular collection**
1. Before completing the first synchronization for the collection, go to the **Collection Profile**.
2. Delete the default OCLC symbol.
3. Enter the appropriate symbol to be associated with the items in the selected collection.
4. Click **Save**.

![Collection Details]

**Figure 16:** Change OCLC symbol associated with a collection

**Note:** After the first synchronization has been completed for this collection, you are no longer able to edit this field.

**Step 4: Viewing and editing the metadata map**

When you view the Metadata Map for a collection, the Gateway initiates the process of harvesting your item-level metadata records for the selected CONTENTdm collection. Harvesting occurs via the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH).

As the harvest occurs, the Gateway transforms the Dublin Core records to WorldCat MARC records.

**Note:** Changes are not uploaded to WorldCat until you click **Approve Map & Sync**. In other words, when you view and edit the Metadata Map the records are not being actively uploaded to WorldCat.

After transforming the records to WorldCat MARC, the Gateway validates the MARC records to ensure they are valid MARC records. If there are validation errors, you will be told which MARC fields contain the errors. Correcting validation errors will usually require: 1) Changing the default mapping (to delete or re-map the fields causing the error); and/or 2) Changing the metadata record in CONTENTdm to be compatible with the crosswalk and WorldCat MARC record.

**To select a metadata map template:**

1. From the Home Tab, or the Collection Profile, click **Edit** metadata mapping.
2. The first time you view a collection using the Gateway, you are prompted to select a map template for the collection.

![Select Map Template]

Select a template for the new metadata map:

- System default map

[Create Metadata Map] [Cancel]

Figure 17: Select map template

A new map template is created for each collection map that you have approved and synchronized using the Gateway. You may re-use your collection maps by selecting them here, or you may select the System Default Map. The System Default Map uses a map created and maintained by OCLC. After you select the template, you may edit it further during the mapping process.

For the Gateway Images collection, we have selected the **System Default Map**.

3. Click **Create Metadata Map**. A progress dialog displays as the metadata processing begins. Records display when available.

**To view the metadata map:**

1. After you click **Create Metadata Map** (above), records display when available, using the selected metadata mapping. In this example, the system default metadata map is being used.

![WorldCat Digital Collection Gateway](image-url)

Figure 18: Default metadata mapping
To select a different metadata template:

If the map template you selected for the collection results in an inadequate mapping, you may select a new template.

1. Click More, then select Reset metadata map.

![Figure 19: Reset metadata map](image)

2. A warning dialog box displays.

![Figure 20: Select a template for the new metadata map](image)

**Warning**

All existing customizations to the metadata map for this collection will be lost.

Select a template for the new metadata map:

- System default map

![Reset Metadata Map Cancel](image)

3. Click the drop-down list to display a list of the metadata map templates.
4. Select the template you want to apply to the current collection.
5. Click **Reset Metadata Map** to view the collection with the newly applied metadata map template.

**Editing the Metadata Mapping**

The yellow highlighting indicates a metadata field. To see which Dublin Core element is being displayed in a particular highlighted field, click the yellow highlighting.

Below, the field with the data "Jones Historical Society" is selected. We see that that field is being populated by the DC.Contributor element.

![Figure 21: Viewing and editing the mapping for a Dublin Core element](image)

6. Since the DC.Contributor element in the CONTENTdm metadata configuration for the Gateway collection is not appropriate for the Author information in the WorldCat.org display, we decide to delete it. To delete the DC.Contributor from the "Author" field in the WorldCat.org display:
   a. Click on the highlighted field you wish to change. The **Edit Mapping** box displays.
   b. Click the pull drop-down list of Dublin Core elements.
   c. Scroll to the top and select **No Mapping**.
   d. Click **Replace** to “unmap” the DC.Contributor element. It is no longer displayed in the WorldCat.org interface.
7. As we scroll down the WorldCat.org display, a **Notes** field contains data from the DC.Format element. Currently, the data being displayed in that field is information about the digital image — “.jpg.”

8. We determine the DC.Format data does not make sense to an end user. Instead, we would prefer to have the data from DC.Contributor (that we just deleted from the Author field) display as a Note.
To change the mapping for the Notes field:
1. Click the highlighted field you wish to change (in this case, the text “jpg”). The Edit Mapping box displays.
2. Click the drop-down list of Dublin Core elements.
3. Find and click the DC. Contributor element.
4. Click Replace to change the mapping of the Notes field from DC.Format to DC.Contributor.

Figure 24: Replacing Dublin Core elements

9. Continuing to review the WorldCat.org display, we note that the DC.Format element could be more appropriately displayed in the Genre/Form field. However, in this case, we would like to add to the already displayed data “image” (from the DC.Type element). To add an additional Dublin Core field to the WorldCat.org display:
   a. Click the highlighted field you wish to change. The Edit Mapping box displays.
   b. Click the drop-down list of Dublin Core elements.
   c. Find and click the DC.Format element.
   d. Click Add to add the DC.Format field to the Genre\Notes field.
10. Finally, we would like to change the Edition\Format. The metadata map functionality works differently for this particular element.

a. Click on the field **Downloadable Computer File**. A new window opens, with options for Change Material Type Key.
Step 1
Select a field from the source metadata. This field will be used to determine a record's material type.

Dublin Core Field: format

Step 2
For any source metadata value in the left column below, double-click the associated value in the right column to change the material type.

<table>
<thead>
<tr>
<th>Field Contents</th>
<th>Material Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>jpg</td>
<td>Downloadable computer file</td>
</tr>
<tr>
<td>pdf</td>
<td>Downloadable computer file</td>
</tr>
</tbody>
</table>

Figure 27: Change Material Type

b. This box displays a list of the values in the DC.Format field from the metadata in CONTENTdm. You may select a different material type for each value. To change the material type, double click the associated value in the right column and select the new material type.

c. In this case we want all items with a DC.Format of “jpg” to have a material type of Downloadable 2-D image: Picture.
d. We also want all items with a DC.Format of "pdf" to have a material type of eBook.
e. Click **OK** to save the changes.

The WorldCat.org display now seems adequate to meet the end user needs. But note that there are other field options available for mapping. The default WorldCat.org display shows you only the fields that were contained in your metadata record. There may be other displayable fields in WorldCat.org that your original metadata record did not contain.

Click **More**, then **Show Unmapped Fields** in the upper-right corner of the interface to see other mappable fields.
These mappable fields display as blue highlighted text with sample data displayed in the WorldCat.org record.

These additional fields provide other options for metadata mapping. To map a Dublin Core element to one of the additional mappable elements, use the same steps you used for the mapped (highlighted) fields.
So far, we have only reviewed a single record in this collection. To see what other records will look like using the mapping that you have created, click the gray left and right navigation arrows to move through the records one at a time, or use the gray slide bar to quickly move through the records, or enter a record number to see a particular record.

**Step 5: Advanced mapping features: record blocking, field splitting, adding prefix and suffix data, and using constant data**

The Gateway provides three more advanced mapping features including:

Record blocking: Block metadata records from being loaded to WorldCat based on the data values of a particular metadata field.

Field splitting: If your existing metadata includes fields that use delimiters, you may split the data values of the delimited field so that each value is contained in its own field.

Prefix and suffix data: You can append prefix and/or suffix data to your existing metadata fields in order to provide additional information for a particular field.

**Record Blocking**

In the Gateway Images collection, we have some digital content that has been contributed to the project by the Jones Middle School. We have used the DC. Contributor field to record the contributor information in the metadata. Jones Middle School has requested that their content be excluded from WorldCat. We can do this by using the record blocking feature.

1. Click **More**
2. Select **Update record blocking list**

![Figure 32: Update record blocking list](image)

3. To block records based on the data values in a particular field, select the field from the pull down list
For the Gateway Images collection, we have selected the contributor element because we want to block records when the contributor element contains the text “Jones Middle School.”

4. The data values for the contributor field from all records in this collection display.
5. **Click** the checkbox next to the data value(s) that correspond to the records you want to block.
6. Click **OK**.
7. When this collection is synchronized with WorldCat, all records which contain the text “Jones Middle School” in the contributor field will be excluded from WorldCat.

**Field Splitting**

The Gateway Images collection includes a DC.Subject field containing data elements that are separated with a semi-colon. By default, the Gateway will map the entire DC.Subject field to a single field in WorldCat. By using the field splitting feature, the Gateway will split the field into separate fields based on the delimiter.

8. To see how the DC.Subject field is mapped (using the system default mapping), go to the **MARC View**
9. Click **More**
10. Select **Update field splitting rules**
11. Select the field you want to split from the pull down list  
12. Enter the delimiter used in the field  

For the Gateway Images collection, we selected the Subject field to split, and entered a semi-colon as the delimiter.

13. Click **OK**  
14. The DC.Subject field has now been split into separate fields.
Finally, we will use the field prefix/suffix feature with the Gateway Images collection. The Gateway Images collection includes two DC. Publisher fields. (Note that the Gateway interface places “numbers” your metadata fields in order to allow you to distinguish among fields when more than one field is mapped to the same Dublin Core element.) The first Publisher field (Publisher 1) includes the name of the organization that is publishing the item in digital format, the “Jones Digital Library.” We want to add some further information to this field in order to give WorldCat users more contextual information about the Jones Digital Library. Specifically, we want to add text so that the field reads, “Jones Digital Library, Jones County, Ohio, USA.”

15. **Click More**
16. Select **Update field prefix/suffix rules**
17. Select the field you want to add a prefix or suffix to from the pull down list. For the Gateway Images collection, we will select the Publisher field.

18. Enter the number of the field (remember that each field in Gateway is numbered in order to distinguish among fields that have been mapped to the same Dublin Core element). For the Gateway Images collection, we want the first Publisher field, so we enter the number “1.”

19. Enter the text you want used as the prefix or suffix for the field. For Gateway Images, we enter the text (without the quotes) “, Jones County, Ohio, USA.” Note that we added comma and space before the text in order to ensure appropriate spacing and punctuation in the field.

20. Click **OK**. The record now displays the Publisher 1 field with the additional text appended to the end of the data.

The Prefix/suffix functionality can also be used to expand a simple identifier such as a DOI or Handle into a full URL. This allows end-users of WorldCat and other search engines to easily navigate to your digital content server when they find your items in WorldCat.
Constant Data

Constant data refers to predefined values for some elements. You will generally define constant data for elements that need the same value for all the records in a single collection. For example, when all of the metadata records should contain the same DC.Source data, and your original metadata in CONTENTdm does not contain that element in the DC.Source field, you may wish to provide a constant data value for the DC.Source element.

For our sample collection, we want to add constant data to each record so that the DC.Source element always contains the data "Digital collection created by the Jones Digital Library, Jones County, Ohio, USA."

21. Click **More**.
22. Select **Update constant data fields**.
23. Enter the constant data that you want to display in the appropriate DC element field. In this case, we have entered “Digital collection created by the Jones Digital Library, Jones County, Ohio, USA.” In the DC.Source field.
24. Click **OK** to save the constant data. The record will display with the constant data in the DC.Source field.
25. Note that when the WorldCat Item view is displayed after adding the DC.Source constant data, the data element is not displayed. This is because the DC.Source element was mapped by default to a MARC field that does not show in the WorldCat.org interface. If we look at the MARC View (see Step 6 below for more information on alternative views), we can see that the DC.Source constant data is in the record.
26. If you want the DC.Source constant data to display in the WorldCat.org item view, you can re-map it to another field as necessary so that it displays in the WorldCat.org item view.

Step 6: Using alternative views

The WorldCat Search View illustrates what the display of this record will look like in the search results list in WorldCat.org.

You may replace and add elements using the same method described above for the WorldCat Item View.

![Figure 45: WorldCat Search View](image)

The MARC View shows this record with its corresponding MARC tags.

You may replace and add elements using the same method described above for the WorldCat Item View.
To see the WorldCat Item View without highlighting or other graphics, click More, then Open Preview in New Window.
Step 7: Analyzing the collection metadata

1. For information to help with the analysis and understanding of the collection’s use of metadata fields, click More, and then select Open Dublin Core Summary in new window.
This informational tool displays a list of the metadata elements used in this collection, and how often each element occurs.

2. You may also view the data values for each metadata element. Click More, then select Open frequency analysis window.
A new browser window opens, displaying a list of metadata elements.

3. Click a metadata element to see its frequency analysis.
Step 8: Completing the mapping and initiating the WorldCat synchronization

After completing the metadata mapping, you may approve the map and initiate the synchronization.

1. Click **Approve Map & Sync** to save the mapping and begin a WorldCat Sync.

   (Clicking **Finish Later** saves the mapping without initiating a sync with WorldCat. Clicking **Cancel** abandons all changes made during this editing session.)

   After clicking **Approve Map & Sync**, a confirmation dialog displays.

2. Click **OK** to save the metadata map and begin a WorldCat Sync. This step initiates the adding of the records to WorldCat, and sets holdings on those records.
Figure 53: Confirmation of metadata mapping and first WorldCat synchronization

You will be returned to the Home tab and the collection will have a status of Syncing.

**Note:** A synchronization will not load CONTENTdm metadata records that are access-restricted.

Figure 54: Synchronization in process for the Gateway collection

When the sync is complete, the status will change to Enabled.
After this first synchronization has completed, the collection will be scheduled to be synchronized quarterly.

**Step 9: Changing the default schedule**

1. To change the sync schedule, **View** the Collection Profile.
2. Click **Edit Sync Schedule**.

Syncs may be scheduled for monthly, quarterly, biannually, or annually. The default schedule is quarterly.

3. Click the radio button next to the appropriate schedule for this collection.
4. To select a specific begin date for the schedule to start, click the calendar icon next to **Select Next Sync Date** and choose a date. The next collection sync will occur on that date. That date will be used to calculate the ongoing sync schedule.

![WorldCat Digital Collection Gateway](image)

**Figure 57:** Changing the default collection synchronization schedule

5. Click **Save** to save the schedule you have set up.

**Note:** You may do an immediate synchronization with WorldCat at any time by clicking **Sync with WorldCat Now**. An immediate synchronization does not affect previously set synchronization schedules.

**Note:** After you have saved your schedule, you can make edits to the metadata map for the collection at any time. These changes will be saved and will be used for the next scheduled sync.

**Step 10: Viewing reports for a collection synchronization**

After the Gateway collection synchronization has completed (the collection has a status of Enabled on the Home tab), we are able to use the Reports tab to view a summary of the sync.

The WorldCat Sync Report provides you with a summary of the results of the sync including:

- Sync settings used.
- Number of new WorldCat records added.
- Number of WorldCat records replaced.
- Records with warnings: A warning is a note of something that the collection administrator should look into but may not need to be fixed. For example, a record loaded by using Connexion digital import that doesn’t get replaced in WorldCat.
- Records with errors: There are two types of errors:
  - An error indicating that there is some problem with the metadata in a record that causes it not to be allowed into WorldCat. This needs to be fixed or the record will never load into WorldCat.
An error indicating that there is some system problem that occurred during the processing that may not be related to the metadata in the record. This type of error should be reported to Support at support@oclc.org.

1. Click the **Reports** tab.

Alternatively, you can view the Collection Profile and click View Report.

The Reports tab displays a list of all completed syncs for your synchronized collections.

2. To view reports for a specific collection, use the **Collection Name Filter** to select a collection.

Currently, there is only one report (WorldCat Sync Report) available.

3. To see reports from a specific date or date range, click in the upper **Date Range Filter** box to select a begin date.
   a. A calendar will display. Click on the appropriate **begin date**.
   b. Click on the lower **Date Range Filter** box to select an end date.
   c. A calendar will display. Click on the appropriate **end date**.
   d. To view reports from a single date, select that date for both the begin and end dates.

4. To sort the columns of the report, click on the **column heading** by which you want to sort. A small arrow will display in the bottom right corner.
5. Click on the arrow to sort in ascending or descending order.
6. Click **View** to view a report in a browser window.
7. If you prefer to download a report, click either **XML** or **Excel** in the **Download** column, depending on your choice of download format.
The Gateway collection had only three records in it. You can see in the Sync Report that all three records were successfully loaded to WorldCat.

---

### WorldCat Sync Report

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form ID</td>
<td>77350135-13275364260-7B4</td>
</tr>
<tr>
<td>Collection Identifier</td>
<td>p9006ce3d</td>
</tr>
<tr>
<td>Collection Display Name</td>
<td>Gateway Images</td>
</tr>
<tr>
<td>WorldCat setting</td>
<td>Replace All</td>
</tr>
<tr>
<td>Sync start time</td>
<td>2009-07-16 15:54:22.721</td>
</tr>
<tr>
<td>Sync end time</td>
<td>2009-07-16 15:54:40.107</td>
</tr>
</tbody>
</table>

**Processing Summary**

- Records harvested: 3
- Records replaced: 3
- Records validated: 3
- Records loaded to WC: 3

**Errors**

- Harvest errors: 0
- Module errors: 0
- Validation errors: 0
- WorldCat load errors: 0

**Additions to WorldCat**

<table>
<thead>
<tr>
<th>OCLC Record Number</th>
<th>Repository Record ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>100096515</td>
<td>2p158haf507-01.cdsqhost.oclcd.orgp9006ce3d0</td>
</tr>
<tr>
<td>100096514</td>
<td>2p158haf507-01.cdsqhost.oclcd.orgp9006ce3d1</td>
</tr>
<tr>
<td>100096512</td>
<td>2p158haf507-01.cdsqhost.oclcd.orgp9006ce3d3</td>
</tr>
</tbody>
</table>

---

**Step 11: Update records in CONTENTdm (optional)**

Now that we have successfully loaded the Gateway Images collection’s CONTENTdm metadata records to WorldCat, we will need to update the CONTENTdm metadata records to complete the synchronization process.

Each of the metadata records now has an OCLC record number associated with it. You may include the OCLC number in your CONTENTdm metadata by completing the synchronization.

**To complete the synchronization:**

1. Open CONTENTdm Administration.
2. Click the **Server** tab.
3. Click **Settings**.
   
   If you have had a successful load to WorldCat, you will see a notification, indicating you have OCLC numbers ready to sync in one or more collections.
2. Click **Complete Sync**.
3. A new browser window opens and displays a list of collections

**Sync collections**

Update the items in your harvested collections with OCLC numbers from WorldCat. Sync all or individual collections when records are ready for synchronization.

<table>
<thead>
<tr>
<th>Collection name</th>
<th>Records ready</th>
<th>Last sync</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gateway Images</td>
<td>Sync records</td>
<td>2010-07-10, 09:26:49</td>
</tr>
<tr>
<td>Sample UW Photo Collection</td>
<td>Complete</td>
<td></td>
</tr>
<tr>
<td>Sample Collection</td>
<td>Sync records</td>
<td>2009-07-10, 09:26:49</td>
</tr>
<tr>
<td>BCM</td>
<td>Sync records</td>
<td></td>
</tr>
</tbody>
</table>

Figure 61: Listing of collections that are ready to have synchronization completed

4. To complete the sync process and update your metadata records in CONTENTdm, click **Sync Records** for a corresponding collection or **Sync All** to complete all the syncs.

You will be asked to wait while the OCLC record number sync occurs.

When the sync is complete, the page updates, with a status of **Complete**.
Sync collections

Update the items in your harvested collections with OCLC numbers from WorldCat. Sync all or individual collections when records are ready for synchronization.

<table>
<thead>
<tr>
<th>Collection name</th>
<th>Records ready</th>
<th>Last sync</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gateway Images</td>
<td>Complete</td>
<td>2009-07-16, 18:38:35</td>
</tr>
<tr>
<td>Sample UW Photo Collection</td>
<td>Complete</td>
<td>2009-06-10, 10:22:53</td>
</tr>
<tr>
<td>Sample Collection</td>
<td>Complete</td>
<td>2009-07-16, 16:06:35</td>
</tr>
<tr>
<td>BCM</td>
<td>Complete</td>
<td>2009-07-16, 15:36:35</td>
</tr>
</tbody>
</table>

Figure 62: Synchronization of metadata with CONTENTdm completed

5. Close the browser window and return to CONTENTdm Administration.
6. Use the refresh button in your browser to refresh CONTENTdm Administration (this clears the notification).
7. **Index the collections** that were synchronized in order to make the OCLC numbers viewable and searchable from within your collection.