Prepare a collection for the Gateway

Learn how to prepare a collection for the Digital Collection Gateway by selecting the record processing type, assigning an OCLC symbol to a collection, and adding a collection-level metadata record.

This section tells how to prepare your collection for synchronization with WorldCat through the Gateway.

Select the Record Processing Type

1. Select the Home tab. The Home tab contains lists of active and inactive collections.
   a. **Active collections** are collections that have active metadata maps and/or synchronizations with WorldCat.
   
      If a collection is not currently assigned to a user, you can click "Assign to me" (in the Assignee column) so that you can subsequently configure and map the collection.
   
   b. **Inactive collections** are collections that the Gateway knows about, but are not being actively synchronized. These collections were enabled at one time in your OAI repository, but they have been subsequently disabled.

      For simplicity’s sake, some users prefer to delete the collection profiles for inactive collections. To do so, select the collection from the Inactive Collections list (in the Home tab).
      ▪ To delete the collection profile for inactive collection, click Delete (in the Collection Profile column).
      ▪ To delete the WorldCat records for this collection, click Delete WorldCat Records (in the WorldCat Records column).

2. Select the repository that contains the collection with which you want to work.

3. Select the collection with which you want to work. Then click View in the Collection Profile column.

   The Collection Profile includes several sections:
   a. **Collection Details** – In addition to the general information displayed for this collection, you can set the WorldCat Record Processing type, collection-level record, and more.
   b. **Sync Details** – You can edit the synchronization schedule for this collection, view its synchronization history, or view a synchronization status report. For more about the Sync Details, see Section 7, “Synchronization with WorldCat.”
   c. **Metadata Map** – You can click the link to edit the collection's metadata map. For more about this, see Section 6, Viewing and editing the metadata map.

4. In the Collection Details section, select the **WorldCat Record Processing** option: Replace All or Add New Only. When you select Replace All (as shown above), the Gateway performs the following actions in WorldCat:
   a. Adds new item metadata records that are in your local repository but not in WorldCat.
   b. Updates item-level metadata records already harvested by the Gateway to WorldCat, with modifications made during editing in your local repository. In other words, if you have modified any item’s metadata record in your local repository, and there is already a matching record for the item in WorldCat (including an exact match on the URL), the modifications made to the record in your local repository are made to the WorldCat record.
When you select Add New Only, the Gateway ignores records that are already in WorldCat, and only adds new item metadata records from the repository.

5. After selecting the record processing option for this collection, click Save.

Assigning an OCLC symbol to a collection

Note: By default, the OCLC Symbol affiliated with your Gateway Key will be assigned to your repositories and to their collections. This is known as “setting holdings” and is the mechanism that enables end users to see which organization holds an item. You can change the OCLC symbol for any repository and for any individual set—but you can only do this before you start the first synchronization for the set. After the first synchronization has been completed for a given set or collection, you cannot edit its OCLC symbol.

To set an OCLC symbol for a collection

1. In the Collection Details area of the Collection Profile, enter the OCLC symbol to be associated with the items in the collection.
2. Click Save.

Adding a collection-level metadata record

1. In the Collection Details area of the Collection Profile, indicate whether you want the Gateway to include your collection-level metadata record in WorldCat.
   - The collection-level record does not use the metadata map that you define for the collection; it uses the default system map. A collection description simply allows users to put your collection in context.

2. The Gateway uses information provided by your CONTENTdm Collection Level record (or your nonCONTENTdm OAI repository’s setDescription field to create the collection-level record in WorldCat. The setDescription field can include either plain text or text tagged with Dublin Core or Qualified Dublin Core metadata elements.