Streamlined holdings update FAQ

Find frequently asked questions about the streamlined holdings update.

**General**

**What is this streamlined holdings update, and why is it important?**

This new program from OCLC gives you a fast and easy way to update your library’s holdings in WorldCat®. Updated holdings ensure accurate representation of your library’s collections in OCLC services, such as FirstSearch®, WorldCat Discovery, WorldShare® ILL, and Connexion®. Up-to-date holdings in WorldCat also ensure people on the web can find items in library collections on WorldCat.org™ and through our partnerships with popular websites like Google Books, Wikipedia, and Goodreads.

You can submit a request for a free update by using the form at [oc.lc/holdings-request](http://oc.lc/holdings-request). Submitting a request does not commit you to proceed with the project. We’ll be in touch with more information about how to get started.

**Will this process update the records for my library’s e-resources in addition to our print materials?**

This process will update the WorldCat holdings for any titles that you manage in your local catalog. If your local catalog includes e-resources and you send records for them in the data you provide us, the holdings for those electronic items will be updated in WorldCat.

We suggest that you also register your e-resources in the WorldCat knowledge base to record content provider and coverage information. If your library maintains these holdings through the WorldCat knowledge base, we’ll update them without the need to include them in your files.

**Can my library use this streamlined process if we have not previously set up a WorldCat data sync collection in WorldShare Collection Manager?**

Yes. This holdings update process includes everything you need for a fast, free update of your library’s WorldCat holdings.

**How long does it take to update my library’s WorldCat holdings after I submit a project request?**

Timing can vary, so we will keep you informed of progress on your library’s project following receipt of your request. Once we provide you with instructions to send your data, we ask that you send it within two weeks or, if that is not possible, tell your specialist when you will be able to send data. After you send data and we begin processing, we may request that you verify reports we supply at certain points in the process. The time you take to verify and respond to our requests will impact the total duration of this work. The faster you respond the quicker we can get your holdings up to date in WorldCat.

**What is not included in the streamlined process that my library would receive in OCLC’s for-fee reclamation**

[https://help.oclc.org/Librarian_Toolbox/WorldCat_Holdings/Streamlined_holdings_update_FAQ](https://help.oclc.org/Librarian_Toolbox/WorldCat_Holdings/Streamlined_holdings_update_FAQ)
OCLC’s for-fee reclamation service is a custom service that includes extensive consultation with OCLC’s holdings update experts to resolve issues related to records that are not updated through our automated processes. It also includes the option to enrich WorldCat records. This streamlined process only sets a holding and removes holdings for items you no longer have in your collection.

What is local bibliographic data (LBD)?

Local bibliographic data (LBD) allows you to add local information to a bibliographic record that is specific to your institution’s title. Users from other institutions will not be able to see that information in the WorldCat record, and your users will only see your institution’s LBD. Learn more about LBD on our Support site.

How can we ask specific questions before we proceed?

We encourage you to join us during our monthly Collection Manager office hours to ask and learn more about streamlined WorldCat holdings updates. These virtual sessions are open for all community members to attend. Check the WorldShare Collection Manager community in the OCLC Community Center for the next scheduled time and recordings of past events.

Data preparation and sending

Are you asking for our entire catalog of full MARC records, or simply the OCLC control numbers we have?

For this streamlined holdings update, we ask for your entire database of MARC records. If there are records you do not want to be visible, you can leave them out. If your entire set of records has OCLC control numbers, please let us know if you want us to only match on the OCLC control number. By default, we will set holdings on full matches.

Do you want our records as one zip file or multiple separate files when we send our collections?

We require multiple files of records—fewer than 100,000 records per file—to ensure that they are properly ingested. Please do not zip your files.

Do you want the WorldCat knowledge base files that we maintain through WorldShare Collection Manager?

We will refresh your WorldCat knowledge base holdings as part of this process, so you do not need to send those files separately.

Can we still add or remove holdings once we begin this update?

Once you send us your data, we ask that you refrain from deleting any WorldCat holdings until the process is complete, usually about two weeks. It’s fine to set holdings at any time.

What if I can’t get my files ready within two weeks?

We prefer that you stay as close to the two-week schedule as you can. Please let us know of any potential delay, and we will set your project up so that it’s ready when you send the files. And please also provide a revised delivery date so that our database specialists can plan their time.
Considerations for groups

Should we do this streamlined holdings update as a group or as individual libraries?

We can handle groups of any kind, so the choice is yours, depending on whether you can provide holdings information in your bib records. If you send us a single data stream for your group, it must contain identifiers for each individual library that needs holdings to be attached/reset for each record in the file(s). These identifiers will be “translated” into OCLC symbols for processing. Your specialist will work with you to create the translation table. We will also need your group OCLC symbol.

One advantage of proceeding as a group is that you won’t have duplicate records returned to you at the end of the project.

We would like to proceed as a group, but some of our libraries don’t want to participate. Can we still send only one set of files?

We can work with you on the translation table, which determines which libraries are included and have holdings set. If there are libraries who aren’t interested, we can exclude them from the table.

Considerations for Alma libraries

How should I export my bib records from Alma?

Use the “Publish bibliographic record (Data Sync) to OCLC” profile. This profile exports MARC bib records. We can provide you with more detailed instructions upon request.

What information do you need if I’m pulling my data from an Alma Network Zone?

You may be able to extract records from the Network Zone to cover all the libraries in your group if you can embed the holdings information (typically in the 852 field in the Institution Zone) in the exported bib records. We use the holdings information along with a translation table to determine which library (OCLC symbol) to add for holdings.

What information do you need if I’m pulling my data from an Alma Institution Zone?

Each library in your group can set up its own streamlined holdings registration (SHR) collection from its Institution Zone, if needed. As long as the holdings information is exported in the bib records, we can set up a single Group SHR collection to process the records for all the libraries using a group OCLC symbol for processing. See Ex Libris’ “Publishing to OCLC” documentation, which explains how to include embedded holdings information, publish print holdings, and more.

Matching process

How are my records matched to records in WorldCat?

Details about the matching process, including the match points, are outlined in OCLC’s “Matching to records in...”
Can I limit the match points, such as only matching on OCLC numbers?

Yes, we can do OCLC number matching only, if that is your preference.

Can I review the records that don’t match in WorldCat before they’re updated?

For the simple holdings project, the ability to add records that do not match is either enabled or not. If you choose to allow records to be added to WorldCat, the only records that will NOT be added will be the records that fail to pass a validation check. These failed records will be available as a report after processing and will list the validation check(s) that failed.

What to expect after the update

Will you send me reports after the update?

Reports will be available for 90 days from the date of upload. You can collect reports and records from the following locations:

- OCLC Usage Statistics
  - Bibliographic and Holdings Processing Summary reports
  - LBD Processing Summary reports
- My Files (under the WorldShare Metadata tab)
- sFTP (xfer/metacoll/reports)

Detailed information about My Files and sFTP reports is available in our “My Files reports for Bibliographic or Delete WorldCat Holdings collections” documentation.

Upon request, we can send a scan/delete holdings report as well.

Can I continue to send a complete update on a regular basis?

It is important that you maintain your holdings in WorldCat going forward, either with a WorldCat data sync collection or via individual records in Connexion or WorldShare Record Manager. This is especially important for new, updated, and deleted items in your catalog, so that users to get the best discovery experience.

Information about maintaining up-to-date WorldCat holdings is provided on the OCLC Support website. If you need help with any of these tools, the OCLC Support team at support@oclc.org can provide assistance.