**Publishing bibliographic records to OCLC***Revised: March 18, 2021**While it is possible to publish either local holdings records or bibliographic records to OCLC, this document will focus on publishing* ***bibliographic records*** *to OCLC.*

# **Background** Implementing Publishing to OCLC in Alma will maintain WorldCat holdings for your institution. Added, updated, and deleted bibliographic records in Alma will be published to OCLC according to the selected schedule (daily or weekly). All bibliographic records with a management tag of *Publish bib* will get published to OCLC. After a bibliographic record has been published at least once, if the management tag is changed to *Don’t publish,* if the last holdings record is deleted, or if the bibliographic record itself is deleted,it will be published to OCLC as deleted.

**General Steps**

1. Create and configure a WorldCat Data Sync Collection in OCLC WorldShare Collection Manager.
2. Define an S/FTP connection.
3. Configure the Publish bibliographic record (DataSync) to OCLC profile.
4. Check management tags on Alma bibs to be published.
5. Publish an initial set of Alma bibliographic records.
6. Schedule the Publish bibliographic record (DataSync) to OCLC profile.

**STEP 1: Create a Data Sync Collection in WorldShare Collection Manager***If you do not already have access to WorldShare Collection Manager, get started* [*here*](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/FAQ/How_do_I_get_access_to_WorldShare_Collection_Manager)*.*

Once you have access to WorldShare Collection Manager:

1. Select the **Metadata** tab, expand the **Collection Manager** section, and click the **Create a collection** button.   
     
    Collection type -- Data Sync Collection  
    Data Sync Type -- Bibliographic  
    Click **Create**.

**Properties**:

Collection Name -- Define a name for your collection (e.g., Published from Alma)  
 Group -- No (for single-college Alma institutions; for multi-college Alma  
 Institutions, select Yes)  
 WMS Library -- No  
 Collection type -- Bibliographic  
 Original Data Format -- MARC  
 Use Record Status for Processing -- YES

**Bibliographic Record Information:**

Initial estimate for record count (i.e., the number of Alma bibliographic records you plan to send in the first publishing job)

**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 (You will not be able to select this yourself. In  
 comment section add this comment for oclc:*Please set “Replace Records in  
 WorldCat” to “No”*)  
 Use Language of cataloging (040 |b) field from records --Yes  
 Excluded information for fixed fields – [Leave blank]  
  
 *If your Alma instance is a multi-college institution, you will also need to configure  
 the* ***Groups*** *tab.*

**Local Bibliographic Data Information:** N/A

**MARC Record Output Information:**

Enable MARC Record Delivery -- No

**Comments:***(You will have to “Save progress” before the Comments section will appear)*

Add a comment: “Please set Replace Records in WorldCat to no”.

**Contact Information:**

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

After reviewing the configuration for accuracy, click **Submit Collection**. If you do not have time to review the configuration and plan to come back to it later, click **Save Progress.** Once you click on either button, note the collection ID that displays toward the top and/or side of the screen. OCLC will not review and accept your data sync collection until you complete Step 5 below, i.e. you need to send the initial file of records before OCLC assigns a database specialist to evaluate and accept your file and data sync collection. **Exception**: If you’re creating a group data sync project, please wait to submit your data to OCLC until a database specialist contacts you.  
  
**OCLC documentation:**

[Data Sync Collections in Collection Manager](http://www.oclc.org/support/services/collection-manager/documentation/data-sync.en.html)  
[Create a Worldcat Data Sync Collection](http://www.oclc.org/content/dam/support/worldshare/dsc/datasync_chklist.pdf)

**Step 2: Define an S/FTP Connection**Email [support@oclc.org](mailto:support@oclc.org) to request the credentials to access the OCLC file exchange server for your account. Provide your college’s name and OCLC symbol. An OCLC representative will likely respond to provide your user name and ask to call you to provide the password over the phone.

1. In Alma, to to Configuration > General > External System > S/FTP Definitions
2. Click **Add S/FTP connection**
3. Give the S/FTP connection a name, e.g. OCLC Data Sync
4. Server: **filex-m1.oclc.org**
5. Port: 22
6. Sub-directory: **/xfer/metacoll/in/bib**
7. Check the **Is full path** box.
8. Leave the Max Number of Filesblank.
9. Enter **1** for Min. Number of Files.
10. Select the largest option for Max. file size.
11. Select **MB** for Size type.
12. Select **True** for Allow Navigation.
13. Select **Default** for Ftp server type.
14. Leave the FTP passive mode box unchecked.
15. Check the **FTP Server Secured** box.
16. Select the **Username/password authentication** radio button for Authentication method.
17. Enter the Username and password that were provided to you by OCLC support.
18. Click **Save**.

**Step 3: Configure the Publish bibliographic records (DataSync) to OCLC profile**

1. In Alma, go to Resources > Publishing > Publishing Profiles.
2. Find the Publish bibliographic record (DataSync) to OCLC profile.
3. Click the ellipsis button and select **Edit**.
4. Profile Details section:
   1. Profile name: Leave as is-- Publish bibliographic record[s] (Data Sync) to OCLC
   2. Profile description: Leave as is -- Synchronize your local catalog with WorldCat
   3. OCLC institution symbol: enter your OCLC symbol.
   4. Project number: leave blank.
   5. Collection ID: Enter the collection ID you obtained at the end of **Step 1 Create a data sync collection** above.
5. Publishing parameters section:
   1. Publishing mode: Incremental
   2. Status: Active
   3. Scheduling: Not scheduled *(after you send your initial file to your data sync collection, and you are satisfied that holdings were set for those records, you will select a scheduling option)*
6. Submission format section:
   1. FTP configuration: From the dropdown options, select the name you provided in **Step 2, number 3** above.
   2. Sub-directory: leave blank.
7. Click **Save**.

**Step 4: Check Management Tags on Alma Bibs To Be Published**

Alma bibliographic records have a management tag for Exporting to WorldCat. The three values for this management tag are Don’t publish, Publish holdings only, and Publish bib. You can view the management tag value for a bibliographic record from the MARC view in the right-hand column under **Export to WorldCat.**

You can identify physical titles by management tag by doing a physical titles advanced search: Tag Sync External Catalog Equals Publish Bibliographic records|Don’t publish|Publish holdings only.

If you are confident that the bibliographic records to be published to OCLC have the correct value of Publish bib, you will not need to do anything. If you are not sure, you can create a physical titles set of these records and run the Synchronize Bib Records with External Catalog job to set the management tag to Publish bib on those records. When you get to the Synchronize with External Catalog? prompt in the task parameters, select **Publish Bibliographic records**.

Alternatively, if you would like to ensure that bibliographic records that *should not* publish to OCLC (e.g. brief bibs for instructor personal copies, bibs representing equipment, etc) do not, you can run the same Synchronize Bib Records with External Catalog job on a set of those records. For this set of records, when you get to the Synchronize with External Catalog? prompt in the task parameters, select **Don’t publish**.

**Step 5: Publish an Initial Set of Alma Bibliographic Records**

This step can serve to test your configuration before you schedule the publishing profile. It can also serve to publish all the Alma bibliographic records for physical records for which you think holdings have not yet been set in WorldCat, i.e. to bring your WorldCat holdings up to date.

Create a physical titles set to publish to OCLC as the initial file for your data sync collection. Preferably, the number of records in your set will match the record estimate you entered in your data sync collection (Step 1). You will want to include bib records for which you have not yet set holdings in OCLC. This will allow you to monitor whether holdings are set after your data sync collection is accepted.

To run the publishing job:

1. In Alma, go to Admin > Manage Jobs and Sets > Run a Job
2. In the Description box, type **Bib OCLC** and press ENTER or click the search icon.
3. Select **Bib OCLC Republish Set of Titles**.
4. Click **Next**.
5. Find and select your set.
6. Click **Next**.
7. Review the job parameters.
8. Click **Submit**.

Your records will publish to your data sync collection. Once the file of records is received by OCLC, a database specialist will be assigned to review and accept your collection. Check the comment section of your data sync collection periodically. You might want to add a comment asking how long it will take to review and accept your data sync collection.

**Step 6: Schedule the Publish bibliographic record (DataSync) to OCLC profile**

Once the OCLC database specialist has accepted your data sync collection, and you are satisfied that holdings for that set of records are accurately reflected in WorldCat, schedule the Publish bibliography record (DataSync) to OCLC profile.

1. In Alma, go to Resources > Publishing > Publishing Profiles.
2. Find the Publish bibliographic record (DataSync) to OCLC profile.
3. Click the ellipsis button and select **Edit**.
4. In the Publishing Parameters section, select a Publishing Mode.
   1. If you used Step 5 to bring your WorldCat holdings up to date, or are otherwise confident your holdings are currently accurately reflected in WorldCat, select **Baseline**. After the first job runs in Baseline mode, the profile will automatically switch to **Incremental** for all future updates. Baseline mode is simply a way for Alma to account for all bibliographic records and their publishing management tags; it does not send any records to OCLC.
   2. If you didn’t complete Step 5, but are not sure whether your holdings are up to date in WorldCat and would like to ensure that all bibliographic records with the Publish bib management tag value are sent to OCLC, select **Full**. After the first publishing job, the mode will automatically be set to **Incremental**. Incremental mode publishes all records that were added, updated, or deleted since the last publishing job.
5. Scheduling: Select either the weekly or daily schedule, according to local needs or preferences.
6. Click **Save**.