

Using the WorldCat Digital Collection Gateway

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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Section 1: Overview

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

To accomplish this, the Gateway harvests Dublin Core metadata from your CONTENTdm or other OAI-compliant repository, transforms the Dublin Core metadata to MARC, and displays a WorldCat Item View. 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.

Before you synchronize your records, you preview them in the WorldCat.org view. When you are satisfied you approve the map as a profile for the entire collection. This map is saved and can be used again with that collection, or with any or all of the collections in your repository.

When the sync is complete, the metadata records are loaded into WorldCat and the OCLC numbers for each item are returned to you where they can be added to your local copy of 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.
- New items are added, and existing records in WorldCat are updated with any changes made to the metadata records in your repository.

In this tutorial, we will be working with a small, sample collection of images, the Gateway collection. We will:

- Review the Gateway interface
- Transform the metadata records to the WorldCat.org display
- Edit the metadata map to customize the WorldCat.org display
- Sync the collection records with WorldCat
- Schedule later synchronizations
- View the Gateway's Sync Report for the collection

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 Gateway-created WorldCat records depends on the way you have set up and implemented the metadata for your collections. To ensure the best metadata mapping and WorldCat records, we recommend that you follow these practices:

- For all fields that you want to display in WorldCat, configure the metadata fields so that they are mapped to **Dublin Core** or **Qualified Dublin Core**. When you configure metadata for your collections, make sure to map every element that you want available for mapping in the Gateway.
- Date fields should use consistent formatting.
- When populating the Dublin Core [language](#) field, use ISO 693-2 or ISO 693-3 standard language tables. The Gateway will utilize that information to construct more precise MARC mappings.

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:

- There are some metadata elements that are useful in your local repository but do not have any context or meaning in WorldCat. For example, the original metadata may include a note about the physical location of the original item, such as *Original on 3rd floor stacks in the Henburg Library*, which may not be appropriate for the WorldCat.org display.
- There are some metadata elements that are not necessary in your local repository but provide essential context and meaning for WorldCat users. For example, when an end user searches your local "Theodore Roosevelt Collection," it may seem obvious 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.
- Complete and consistent metadata records ensure complete and consistent WorldCat.org displays.

The document **Best Practices for CONTENTdm and other OAI-PMH compliant repositories: creating sharable metadata** presents optimized and standardized Qualified Dublin Core metadata element sets to increase the discoverability of your metadata in the local environment and across open access repositories such as WorldCat.org.

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.

Access and view the server settings

1. Open CONTENTdm Administration.
2. Click the **Server** tab.
3. Click **Harvesting**

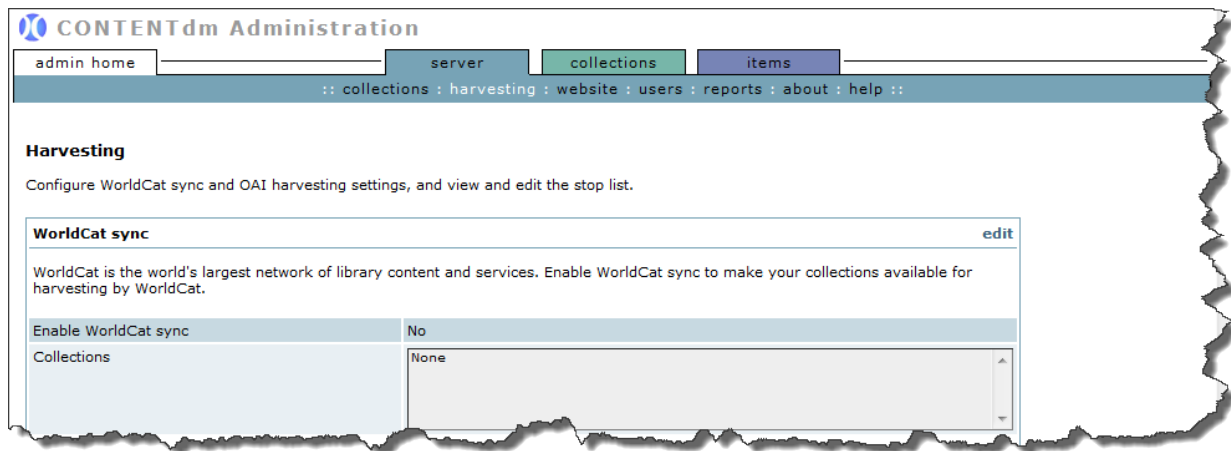


Figure 1: Edit settings for Harvesting

Configure WorldCat Sync settings for the Gateway collection

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

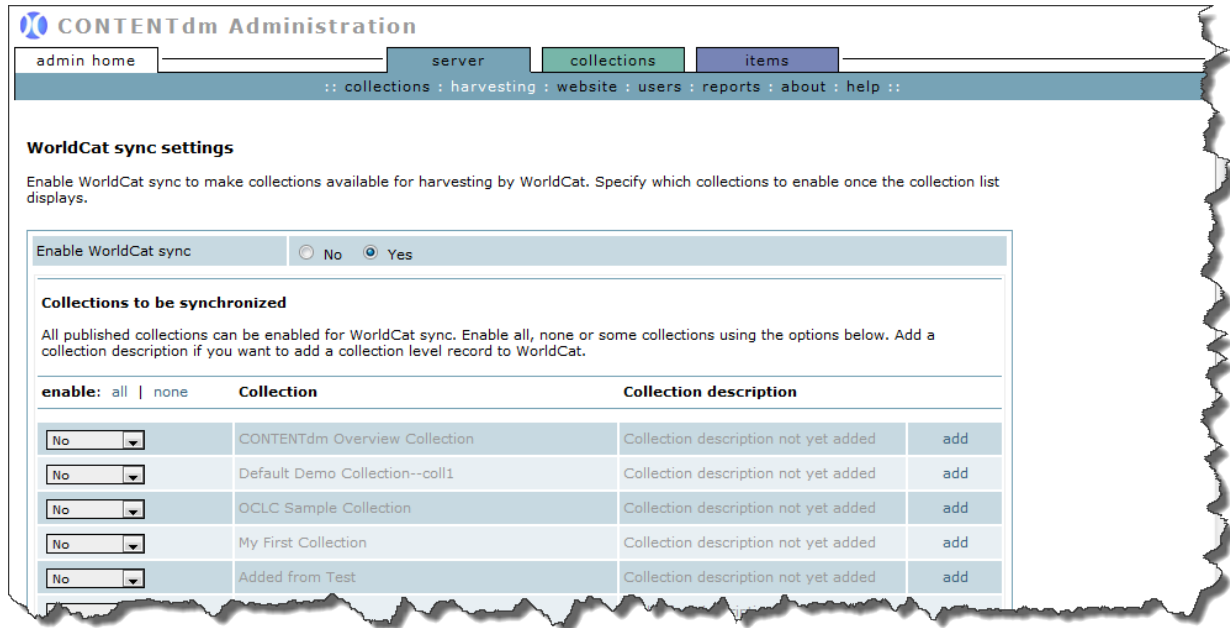


Figure 2: Enable WorldCat Sync

- 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**.
- To enable selected collections for WorldCat Sync, select **Yes** from the drop-down menu for each collection that you want to enable.

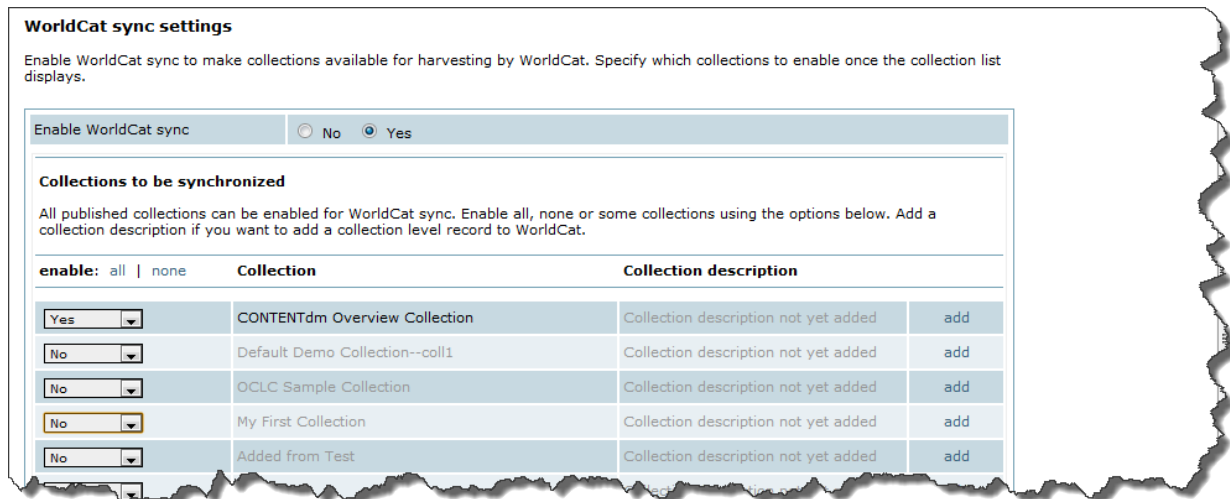


Figure 3: Turn on selected Collections for Harvesting

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 page:

1. Click **Add**. The Collection description page displays.
2. Create the collection-level metadata record.

CONTENTdm Administration

admin home server collections items

:: collections : harvesting : website : users : reports : about : help ::

Current collection: CONTENTdm Overview Collection

Collection description

Create a collection description to generate a collection level bibliographic record in WorldCat when your collection is harvested.

Title	CONTENTdm Overview Collection
Subject	
Description	Images and metadata records used for training with CONTENTdm 6 and the Digital Collection Gateway.
Creator	GBI
Publisher	OCLC
Contributors	
Date	2012-08-21
Type	
Format	
Identifier	

Figure 4: Create a collection-level record for display in WorldCat

1. 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**.

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.

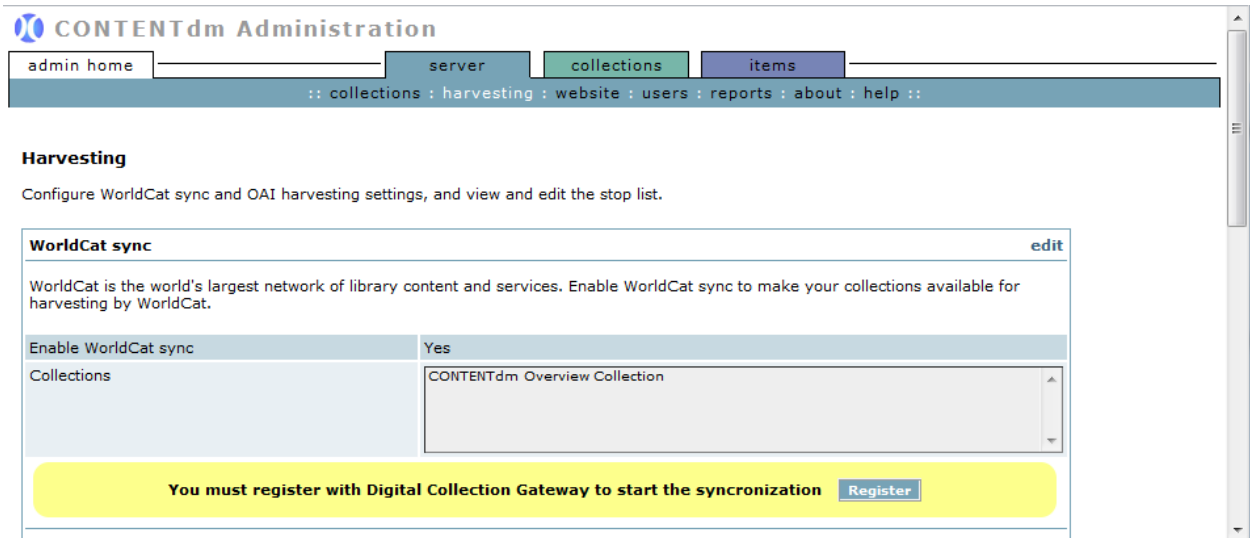


Figure 5: Register with the Gateway

If you have already registered, you will be returned to the Server Settings page and will see a **Login** link to the Gateway.

Register with the Gateway (first-time users only)

From the Server Harvesting page

1. click Register. Note that the registration page will automatically complete the **Repository URL** and **CONTENTdm License Key** fields.
2. Enter your e-mail address.

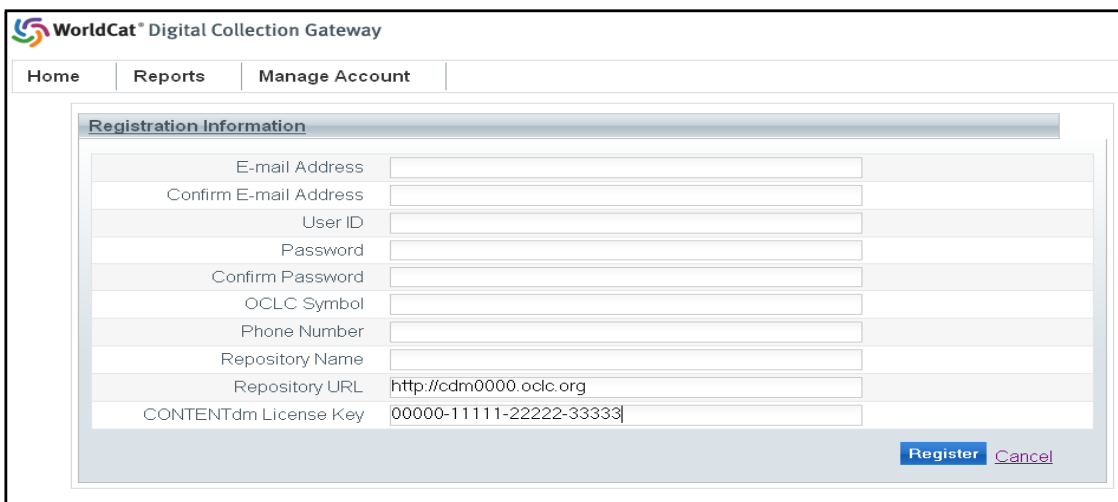


Figure 6: Note the URL and License Key are supplied

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)

You can look up your OCLC symbol at

<http://www.oclc.org/us/en/contacts/libraries/>

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 your 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.

Section 4: Managing Users and Repositories

This section tells how to perform basic tasks in your role as Gateway administrator for your account. You'll learn how to:

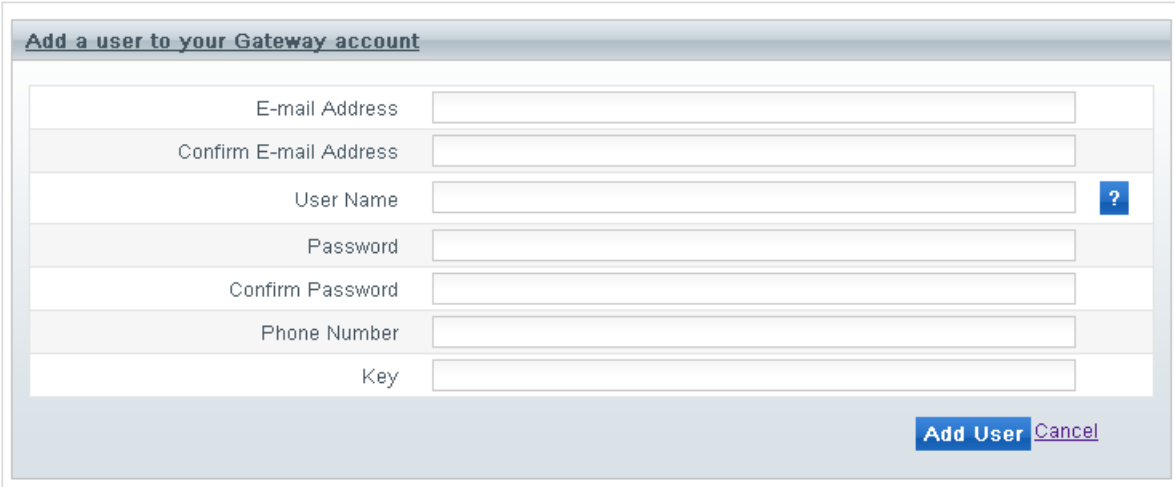
- Add users to your Gateway account
- Log in to your Gateway account
- Manage repository settings
- Assign collections to users
- Update your e-mail address, phone number, and password

Adding users to your account

Once you've registered your Gateway account, you can associate other users with it. To add a user:

1. Go to the Gateway registration page at <http://worldcat.org/digitalcollectiongateway/register.jsp>.
2. In the "Add a user ..." section (at the bottom of the page), provide the following information:
 - The user's e-mail address.
 - The Gateway user name and password for this user.
 - The user's phone number.

- Your Gateway account key – This text string was included in the welcome e-mail from OCLC with your user credentials and account information.



The screenshot shows a web form titled "Add a user to your Gateway account". The form contains several input fields: "E-mail Address", "Confirm E-mail Address", "User Name" (with a blue question mark icon), "Password", "Confirm Password", "Phone Number", and "Key". At the bottom right of the form, there are two buttons: "Add User" (in blue) and "Cancel" (in purple).

Figure 7: Add a user to your Gateway account

3. Click **Add User**. The new user will immediately be able to log in to your Gateway account.

Note: If you encounter difficulty when attempting to add a user to your account, send an e-mail to support@oclc.org for help with troubleshooting the issue.

Logging into the Gateway interface

You can log in to the Gateway directly at <https://worldcat.org/digitalcollectiongateway/login.jsp>.

Or, you can log in via CONTENTdm Administration:

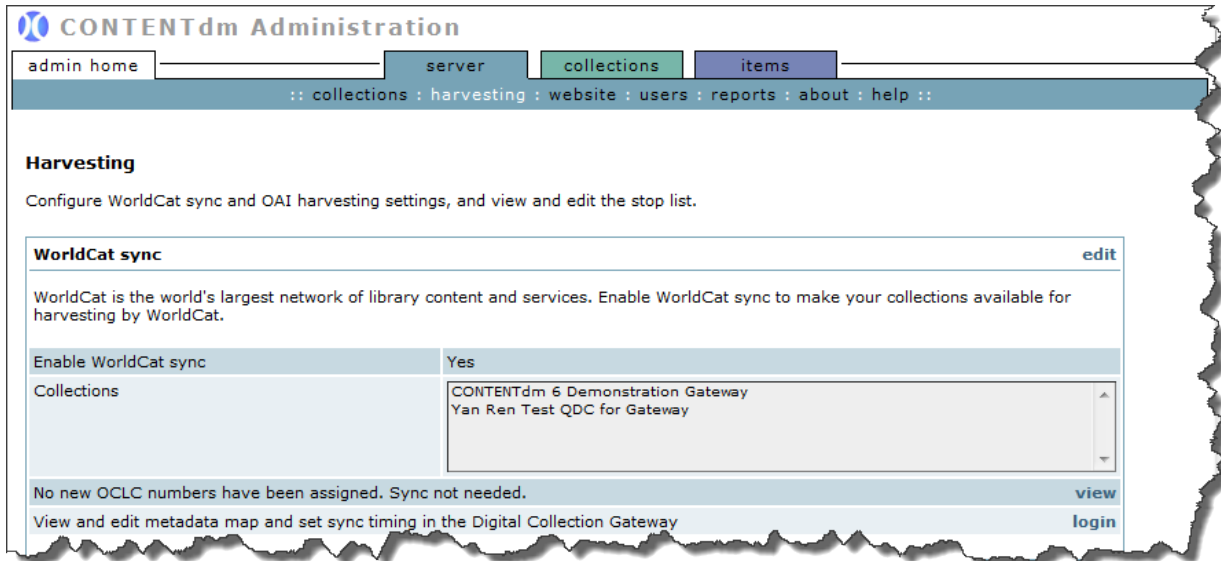


Figure 8: No new OCLC numbers have been assigned since sync completed.

Managing repository settings

From the Manage Account tab, you may select a repository and change two of its settings: Type and Show Sets.

1. Select the **Manage Account** tab.
2. If it is not already open, click to open the **Keys and Repositories** section.
3. In the list of repositories, click to select the repository for which you want to view details.

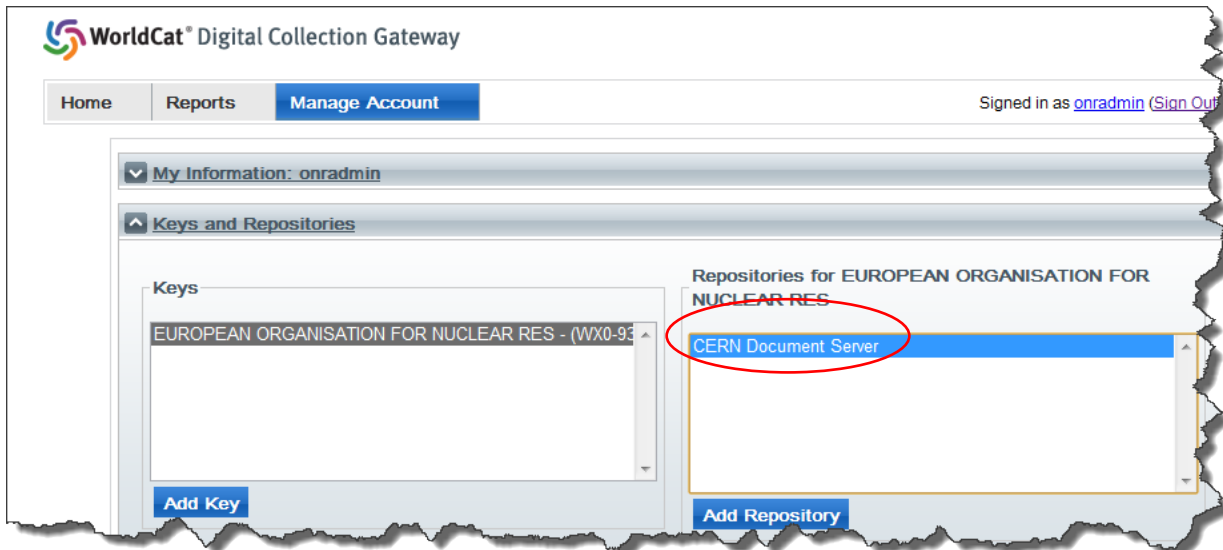


Figure 9: Manage a repository's settings

4. In the Repository area of the page, the following information is displayed:

- Institution symbol (OCLC symbol)
- Gateway license key
- URL, name – the OAI-PMH base URL and name of this repository
- Type – To change the repository type, use the pull-down menu to select one of the following: CONTENTdm (pre version 5), DSpace, Fedora, Eprints, Digital Commons, or Other. After changing the type, you must click **Change** to save your choice.

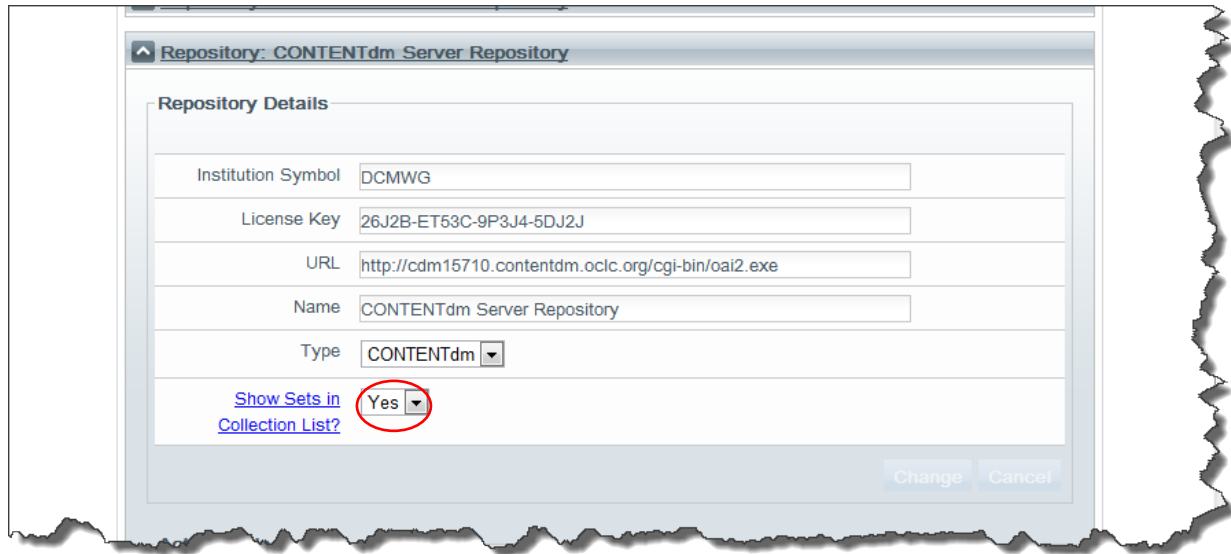


Figure 10: Choose the default to show individual sets in Collection list.

5. You can use the **Show Sets in Collection List?** Pull-down menu to configure the way the Gateway harvests content from a repository.

Your OAI repository allows you to manage sets (collections of records) separately in the Gateway. Using sets is the default approach. In the Gateway, a set name is the same as a collection name.

By default, **Show Sets...** is **Yes**. This default setting allows you to set up different metadata maps for each collection (or set) in a repository.

If you want to create a single metadata map for all records in your OAI repository, regardless of what collection the records are in, you can select **No** from the pull-down menu. Selecting **No** will create a special collection named **Entire Repository**. When you create a metadata map for that special collection, your mappings apply to the entire repository.

- **Note:** If you select **No**, you cannot subsequently undo that setting in the Gateway. For this reason, we strongly recommend that you do not change the default setting. Moreover, with multiple sets you may choose to apply one profile to several (or all) of the sets at any time.

Assigning collections to users

Since your license key may be used by more than one Gateway user, you can assign users with that key to particular collections. The users can then map metadata and synchronize with WorldCat for each collection to which they are assigned.

1. Select the **Manage Account** tab.

2. In the Keys and Repositories section, select the repository containing the collections that you want to assign.
3. In the Repository section, click to select a collection from the Active Collections list.
 - To assign multiple collections to a user, hold down the Ctrl key and click to select each collection name.

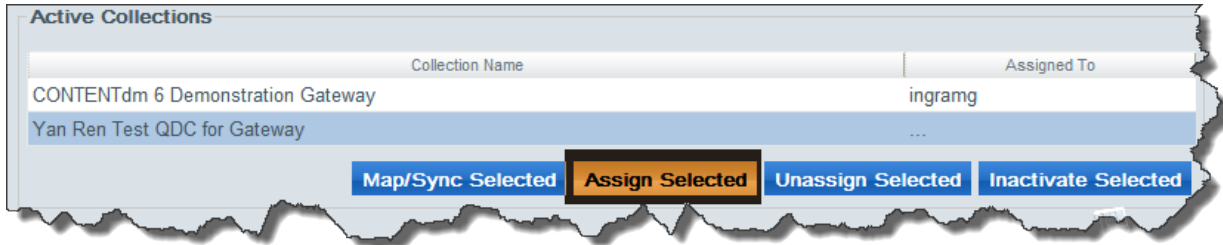


Figure 11: Assign multiple sets at once

4. Click **Assign Selected**.
5. Use the pull-down menu to select the user you want to assign to the highlighted collection(s).

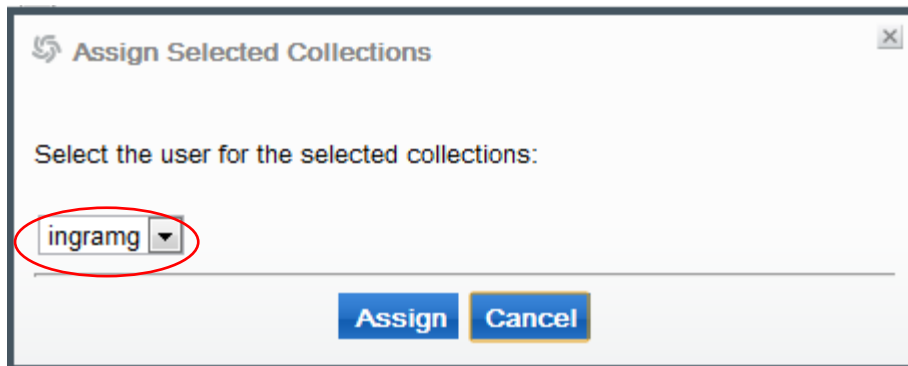


Figure 12: Select the user to assign

6. Click **Assign**.
7. The collection is now assigned to the selected user:

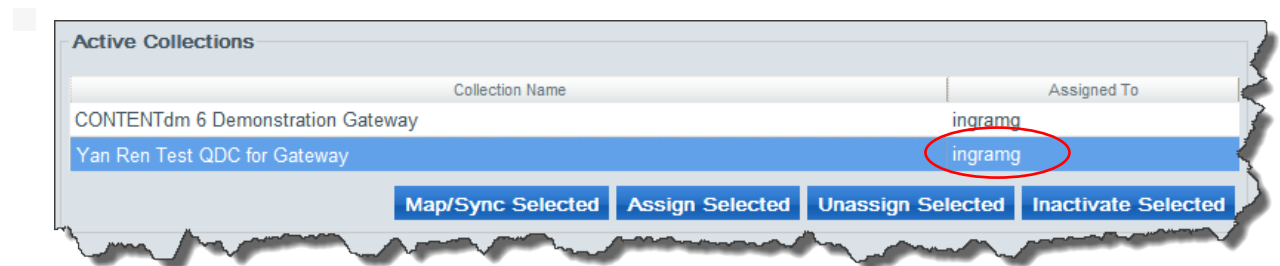


Figure 13: Selected user has been assigned the collection(s).

8. To assign this or any other collection to a user, repeat the preceding steps, using the pull-down menu.

Updating your personal information

To change your e-mail address, phone number or password:

1. Select the **Manage Account** tab.
2. Click to open the **My Information** section.
3. In the User Details area, make any needed changes, and then click **Change**.

The screenshot shows a web interface for 'My Information' for a user named 'ingramg'. The 'User Details' section contains several input fields: 'User name' (ingramg), 'User e-mail' (ingramg@oclc.org), 'User phone' (800-848-5878), 'Change password', and 'Re-type password'. At the bottom right, there are two buttons: 'Change' and 'Cancel'. The 'Change' button is circled in red.

Figure 14: Change my personal info

Section 5: Preparing a Collection for the Gateway

This section tells how to prepare your collection for synchronization with WorldCat through the Gateway. You'll learn how to perform the following steps:

- Select the type of record processing for this collection. You must select the processing type before you start to map metadata.
- Assign an OCLC symbol to the collection.
- Indicate whether to include a collection-level record.

Select the Record Processing Type

1. Select the **Home** tab. The Home tab contains lists of active and inactive collections.
 - **Active** collections are collections that have active metadata maps and/or synchronizations with WorldCat.

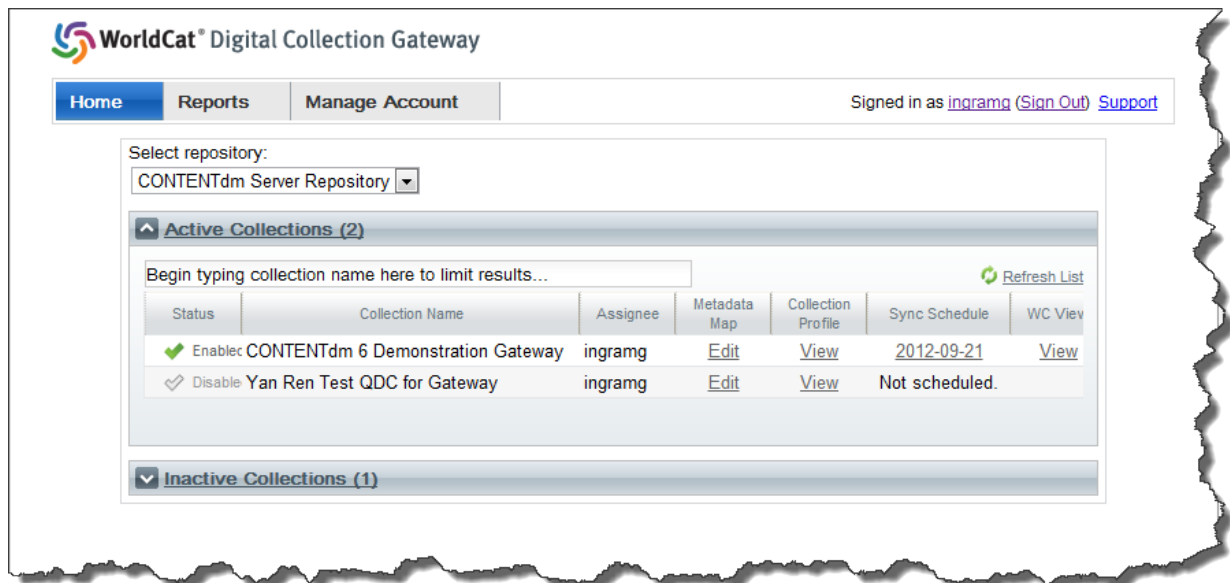


Figure 15: Active Collections or Sets

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.

- **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).*

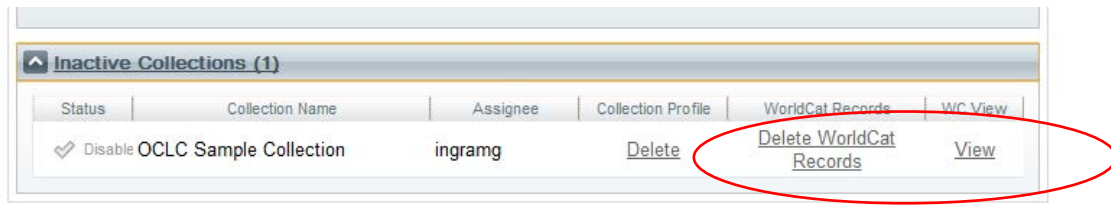


Figure 16: Removing Inactive Collection Profiles and WorldCat Records

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

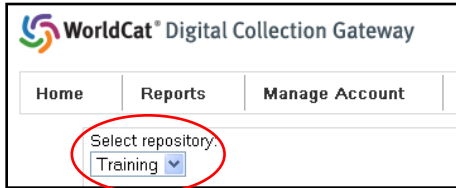


Figure 17: Select a Repository (group of sets or collections)

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

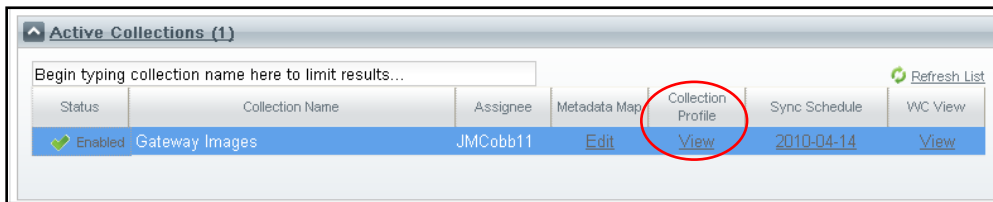


Figure 18: View the Collection Profile

The Collection Profile includes several sections:

- **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.
 - **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."**
 - **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.

Collection Identifier	p15165coll14
Collection Display Name	Gateway Demonstration
Active	Yes
WorldCat Record Processing	<input checked="" type="radio"/> Replace All <input type="radio"/> Add New Only
OCLC Symbol	DCMWG
OCLC Symbol Display Name	DIGITAL COLL SERVS METADATA WORKING G
Include collection-level record in WorldCat?	<input checked="" type="radio"/> Yes Preview collection-level record in Worldcat display. <input type="radio"/> No
Metadata Format	Qualified Dublin Core

Figure 19: Choose to Replace existing or Add New Only

When you select **Replace All** (as shown above), the Gateway performs the following actions in WorldCat:

- Adds new item metadata records that are in your local repository but not in WorldCat.
- 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**.

Collection Profile: Gateway Images
Repository: Training

Collection Details

Collection Identifier	p9006coll4
Collection Display Name	Gateway Images
Active	Yes
WorldCat Record Processing	<input checked="" type="radio"/> Replace All <input type="radio"/> Add New Only
OCLC Symbol	OCL
Include collection-level record in WorldCat?	<input checked="" type="radio"/> Yes Preview collection-level record in Worldcat display. <input type="radio"/> No

[Help](#) [Save](#) [Cancel](#)

Figure 20: Set holdings symbol for specific Collection

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.

Collection Details

Collection Identifier	p9006coll3
Collection Display Name	Gateway Images
Active	Yes
WorldCat Record Processing	<input checked="" type="radio"/> Replace All <input type="radio"/> Add New Only
OCLC Symbol	CWR
Include collection-level record in WorldCat?	<input checked="" type="radio"/> Yes Preview collection-level record in Worldcat display. <input type="radio"/> No
Metadata Format	OCLC Dublin Core

[Help](#)

Figure 21: Include collection-level record

2. The Gateway uses information provided by your CONTENTdm Collection Level record (or your non-CONTENTdm 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.

Section 6: Viewing and Editing the Metadata Map

When you view the Metadata Map for a collection, the Gateway initiates the process of harvesting your metadata records for the selected collection. Harvesting takes place using the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH). During the harvest, the Gateway transforms the Dublin Core records to WorldCat MARC records.

Note: While you are viewing or editing the Metadata Map, your metadata records are not being actively uploaded to WorldCat.

After transforming your metadata records to WorldCat MARC, the Gateway tests the MARC records to ensure they are valid. If there are validation errors, the Gateway reports which MARC fields contain the errors. Correcting validation errors usually requires that you change the mapping (to delete or re-map the fields responsible for the error). It may be helpful to use the MARC view when making these adjustments. (For more about MARC view, see "[Switching between views](#)," later in this chapter.)

Selecting a metadata map template

1. In the Home Tab, select the collection whose metadata map you want to edit. Then click **Edit** in the Metadata Map column.

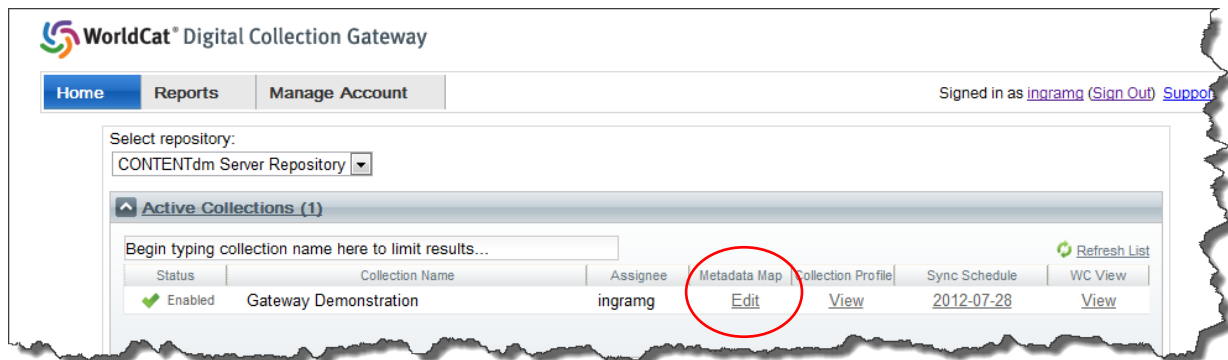


Figure 22: Edit the Collection's metadata map

- Alternatively, you can click the **Edit Metadata Map** Link in the Metadata Map section of the Collection Profile.

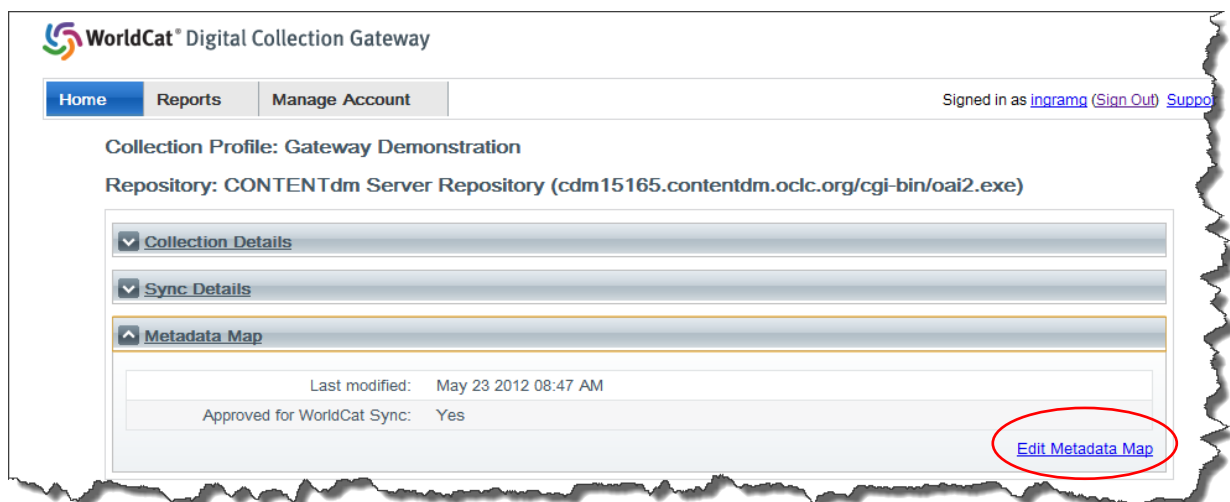


Figure 23: Another link to Edit the Collection's metadata map

2. The first time you view a collection using the Gateway, you are prompted to select a map template for the collection.

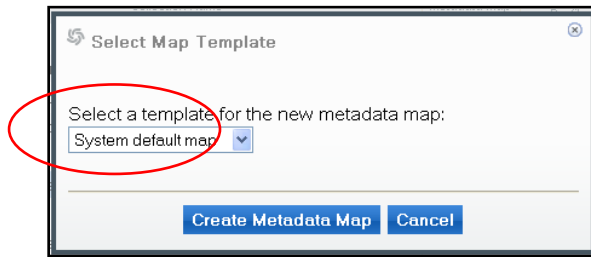


Figure 23: Start with the default or any other map you have created

You can re-use map templates that you've defined previously for other collections, or you can select the System Default Map, which is created and maintained by OCLC. After you select the map template, you can edit it further during the mapping process.

For our sample collection (Gateway Images), we've selected the **System Default Map**.

3. Click **Create Metadata Map**. A progress dialog displays as the metadata processing begins. Records are displayed as they become available.

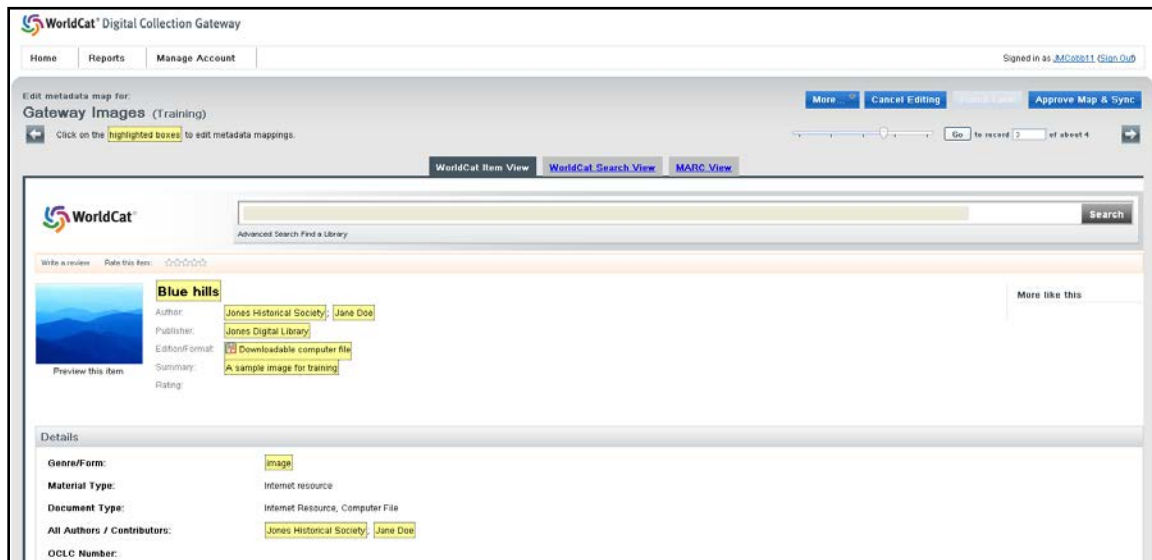


Figure 24: Records load into the editor

To select a different metadata template:

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

1. From the **More** pull-down menu, select **Reset metadata map**.

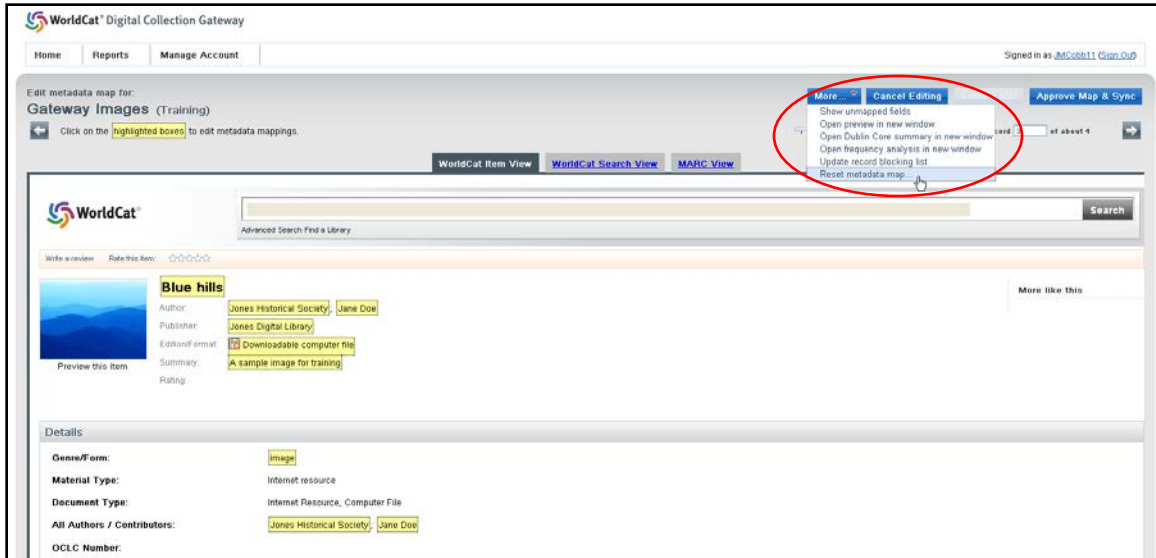


Figure 25: Reset metadata map

- When the Warning dialog box appears, click the drop-down list to display a list of available metadata map templates.

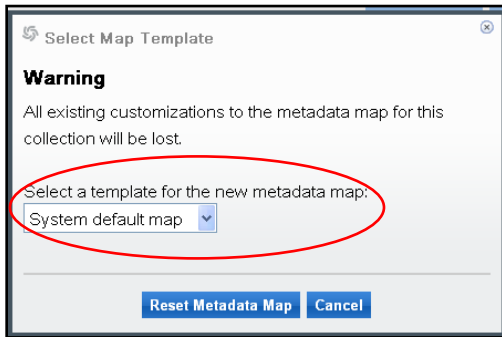


Figure 26: Select a different template

- Using the drop-down list, select the template that you want to apply to the current collection.
- Click **Reset Metadata Map** to view the collection with the newly applied template.

Editing the metadata map

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

In the following example, the field with the data "Contributed to the Jones Digital Library..." is selected. The Edit Mapping popup box tells us that the field is being populated by the Dublin Core contributor element. But that element isn't appropriate for the Author information in the WorldCat.org display – we need to delete that mapping.

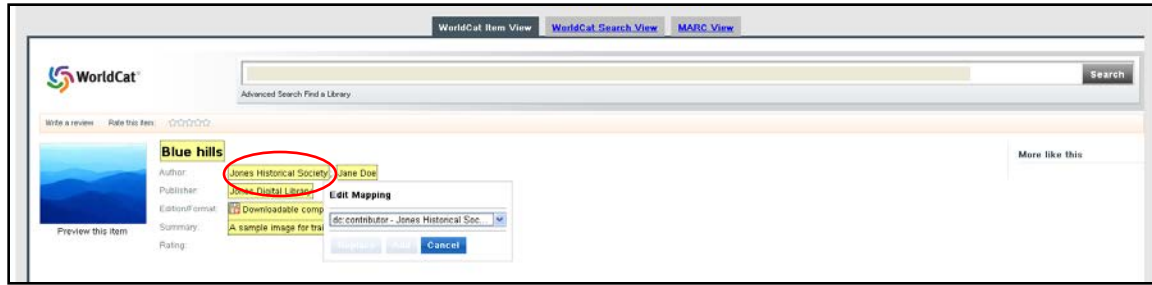


Figure 27: Delete a mapping

Deleting a metadata element

To delete a metadata element from a field in the WorldCat.org display:

1. Click on the highlighted field you wish to change. The **Edit Mapping** box displays.
2. Click the drop-down list of Dublin Core elements.
3. Scroll to the top and select **No Mapping**.
4. Click **Replace** to “unmap” the contributor element. It no longer appears in the WorldCat.org display.



Figure 28: Replace to “unmap”

Remapping a metadata element

You can use this same approach to map a field to a different element (rather than simply unmapping it). In step 3 (above), you would select the desired element, and then click **Replace**.

Adding metadata elements

Similarly, you can edit the metadata map to add additional fields to the WorldCat.org display. For example, you might want to add a second Dublin Core element along with the existing type element in the Genre/Form field:

1. Click the highlighted field you wish to change. The **Edit Mapping** box appears.
2. In the drop-down list of Dublin Core elements, find and click the format element.
3. Click **Add** to add the format element to the **Genre/Form** field.

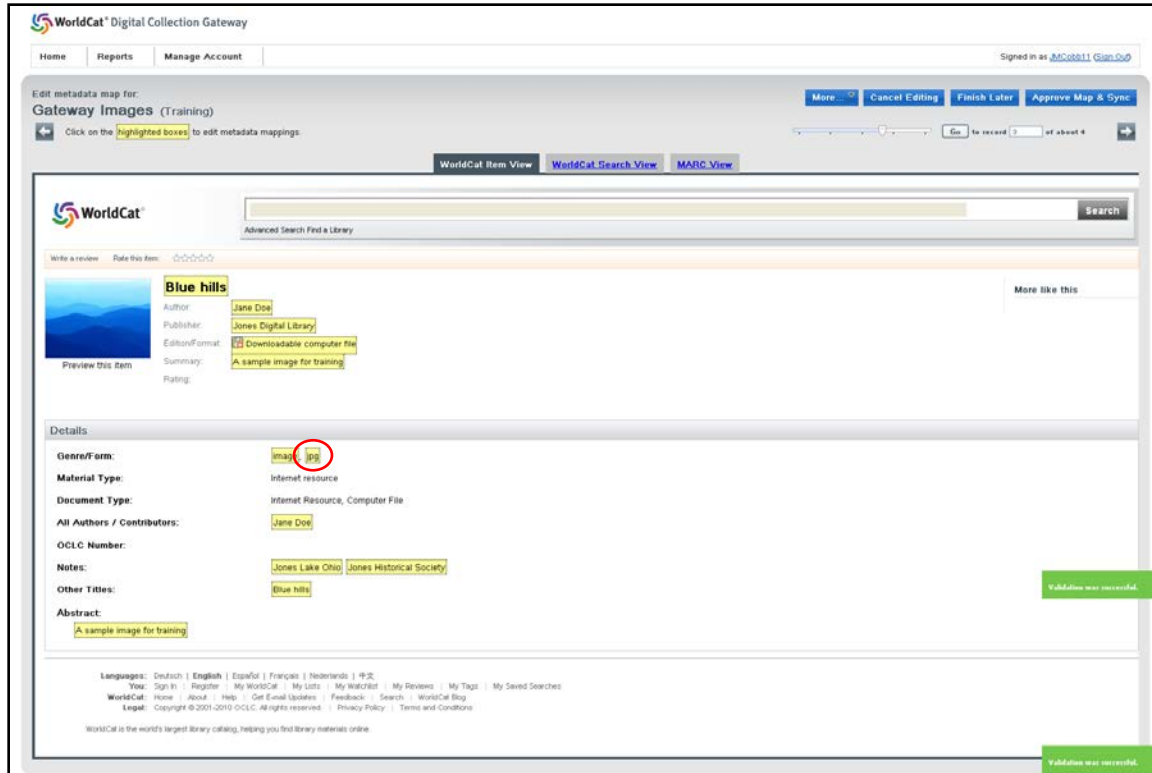


Figure 29: Add a new mapping field

Changing the Edition/Format field

Since Dublin Core doesn't have a reference field, the Gateway uses a default material type of Archival material for every record that is uploaded to WorldCat. You can use Material Type mapping to get a finer-grained view of the records that you upload. Many repositories use the Dublin Core type element for this mapping. There's a different editor for the Edition/Format field.

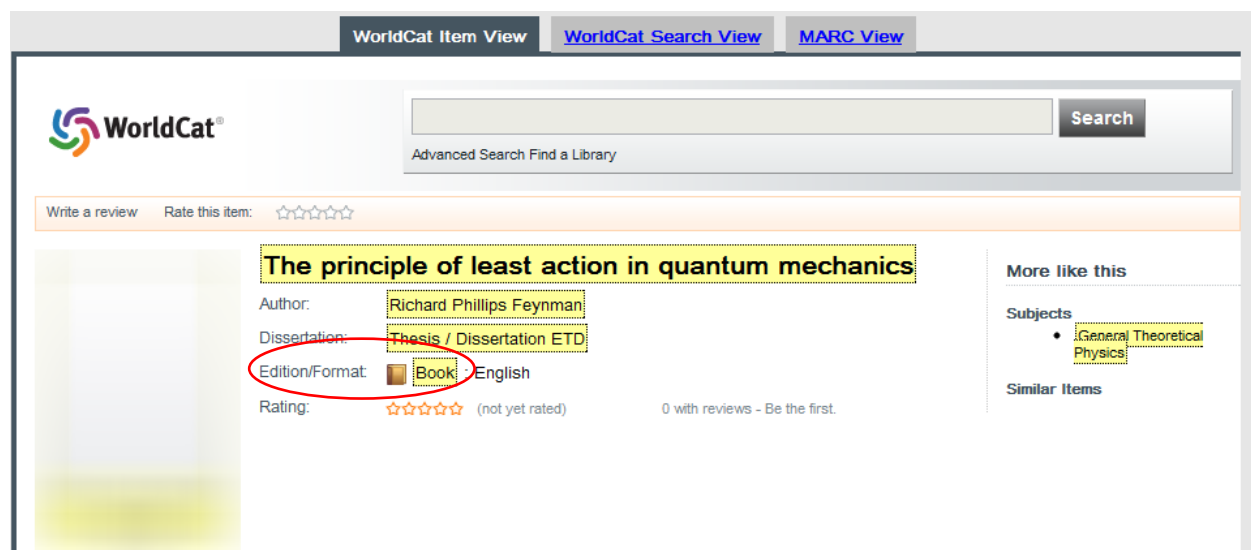


Figure 30: Change the Edition/Format map

1. Click the highlighted field you wish to change (in our example above, **Book**).
2. A new dialog box appears, with options for Change Material Type Key. Step 1 contains two radio buttons: you will choose the method based on the materials in the collection
 - If all records in the collection are of the same type, you might click the top button.

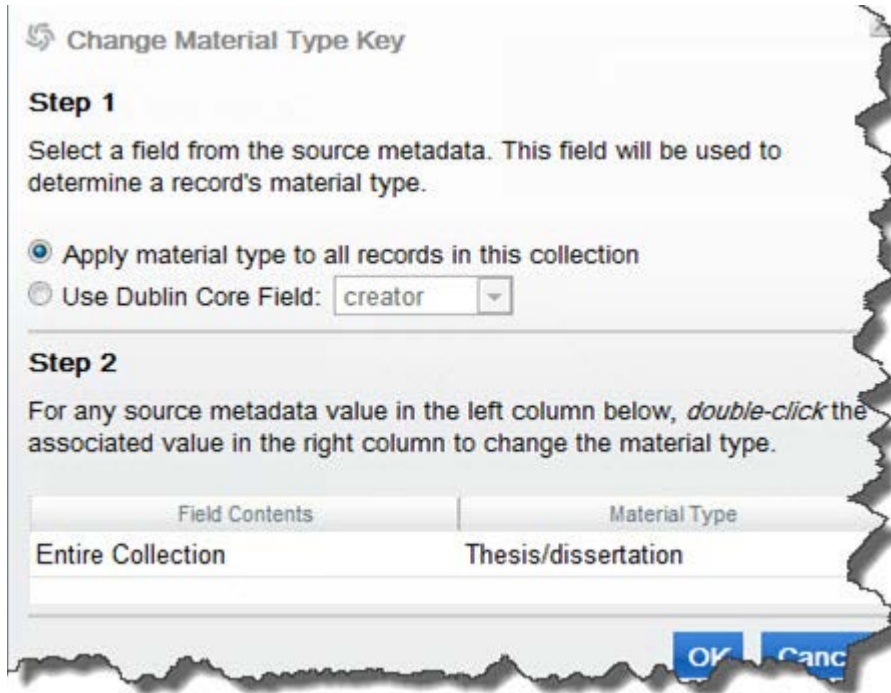


Figure 31: Change Material Type Key in two methods

Since in this example, the entire collection represents theses and dissertations, the Edition/Format field for each record will now contain the label *Thesis/dissertation*.

- Alternatively, for a collection containing multiple material types, you may decide to map different field content values to different material types. You would click on **Use Dublin Core Field** in the Step 1 area of this dialog box, and then verify that whichever element contains the distinguishing value for a record is selected in the pull-down menu.

In the following example, we want to change the value from the system default (*Archival material*) to a different material type depending upon the value in the Format field itself.

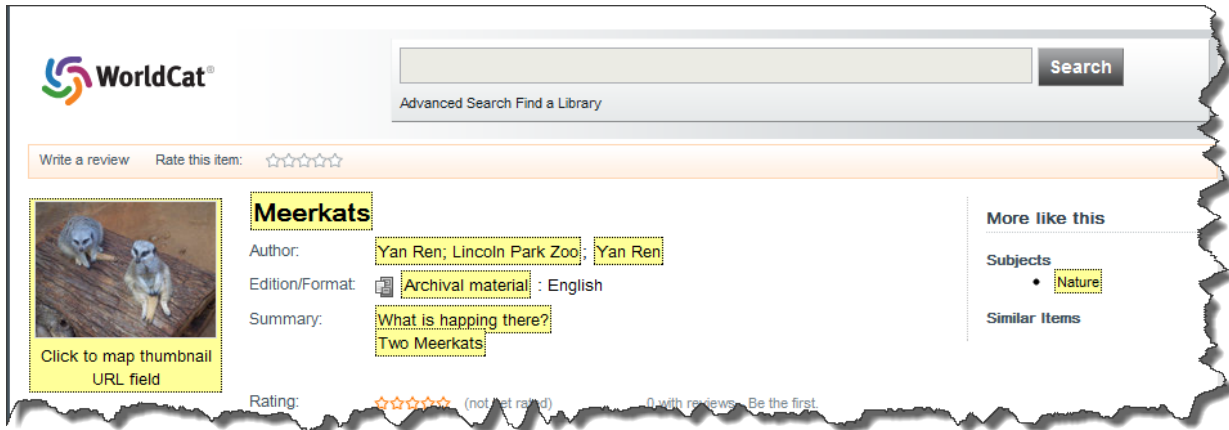


Figure 32: Change value for Edition/Format from *Archival material*

3. Again, click the highlighted field you wish to change (in this example above, **Archival material**).
4. Choose the **Use Dublin Core Field** radio button. Step 2 now displays a list of the values from the format field in the collection metadata.

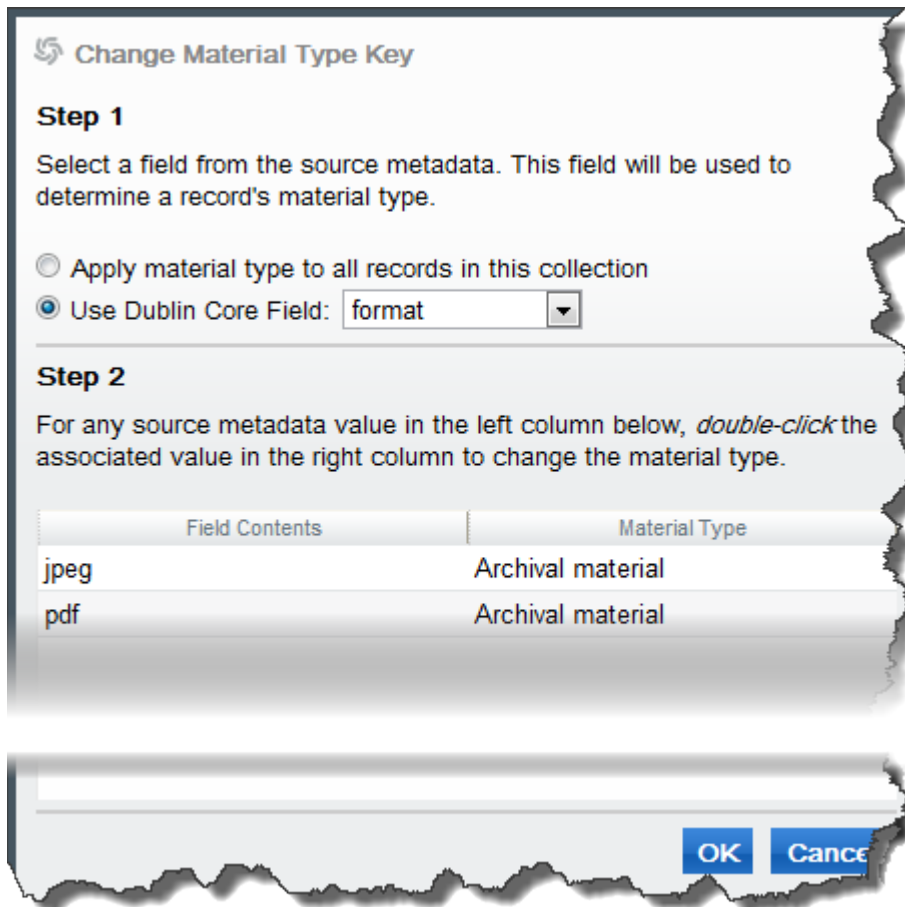


Figure 33: Choosing a specific field's values to remap Edition/Format

3. You can select a different material type for each value. In the Material Type column that corresponds to "jpeg", double-click on "Archival material." Scroll down and select "Image."
5. Similarly, you can double-click the material type for "pdf" and select "Article".
6. Click **OK** to save your changes.

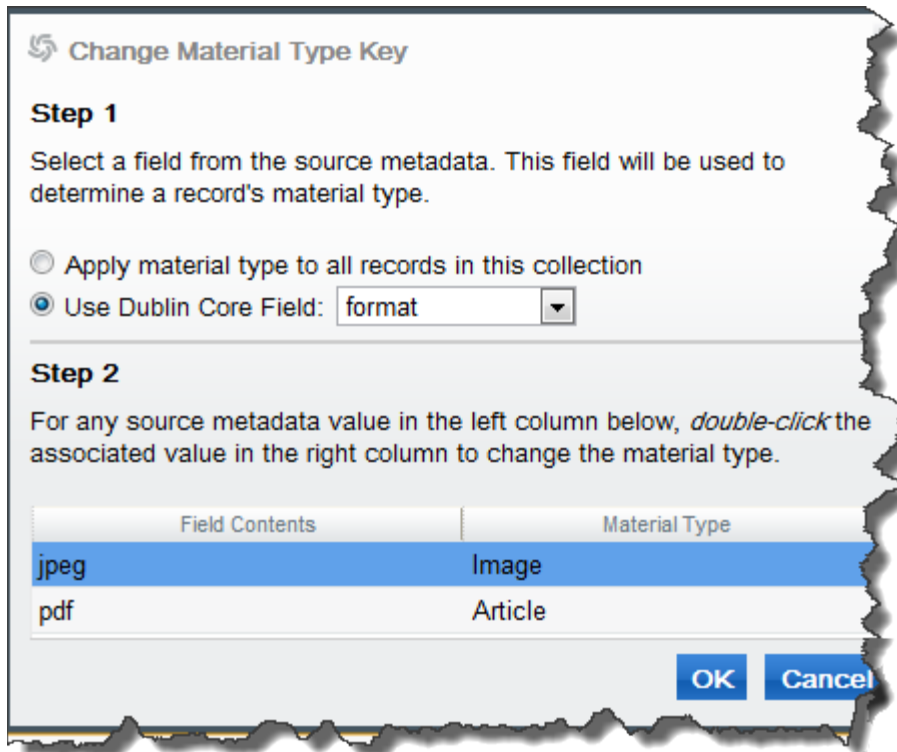


Figure 34: Using the Format field value *jpeg* to show *Image* in Edition/Format

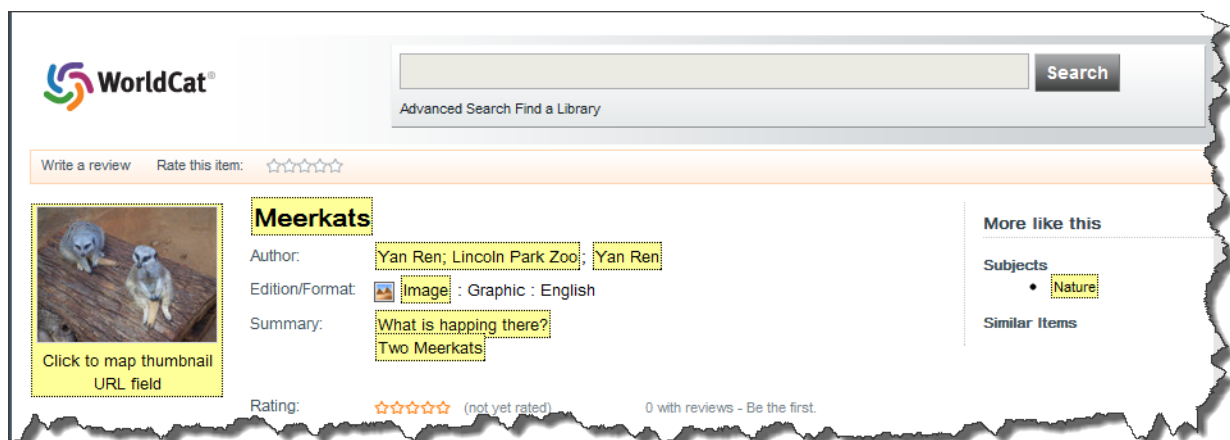


Figure 35: Results show in Edition/Format

Mapping other fields

Although the WorldCat.org display now seems adequate to meet end user needs, there are other field options available to you for mapping. The default WorldCat.org display shows only a few standard

fields displayed in a brief record. There may be richer metadata in your original record. As long as the metadata is in a Dublin Core field, you can map it to display in WorldCat.org, provided the mapping creates a valid MARC record.

From the **More** pull-down menu, select **Show unmapped fields**:

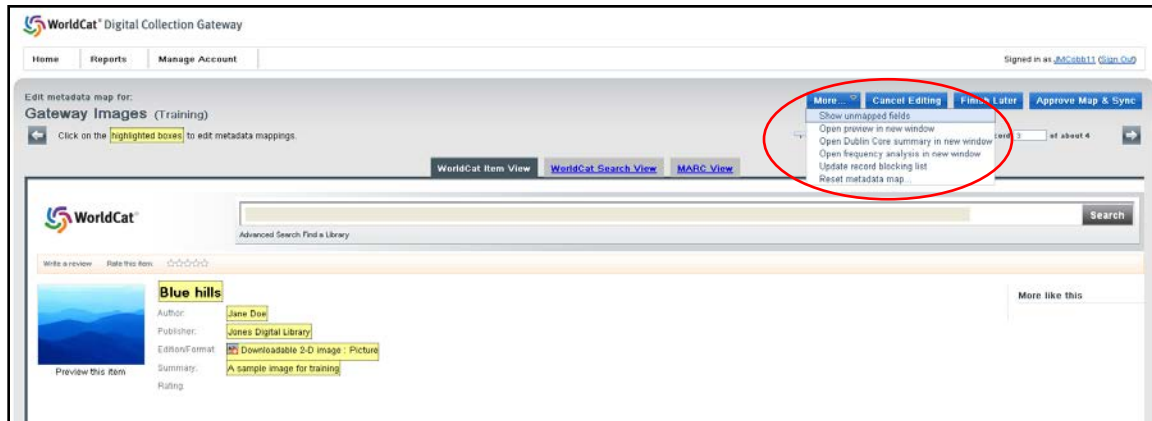


Figure 36: Show unmapped fields

These mappable fields display as blue highlighted text with sample data displayed in the WorldCat.org record.

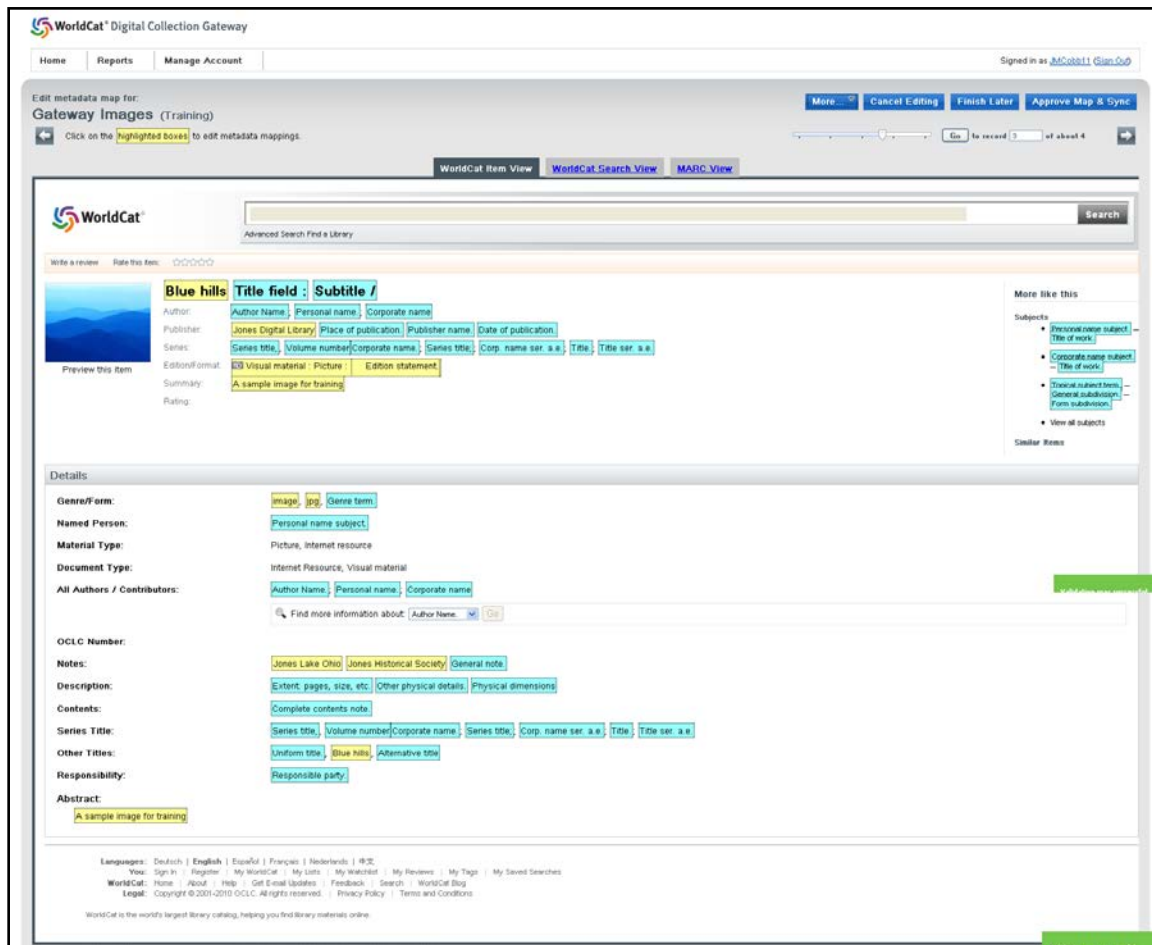


Figure 37: Unmapped fields display in blue

To map a Dublin Core element to one of the additional mappable elements, use the same steps you used for the mapped (highlighted) fields.

In this example, we've only reviewed a single record in this collection. To see what other records will look like using the mapping that you have created, you can navigate in any of these ways:

- Click the gray left and right navigation arrows to move through the records one at a time.
- Use the gray slider bar to move quickly through the records.
- Enter a record number to see a particular record.



Figure 38: Navigate to a specific record

Advanced mapping features

In addition to the features described above, the Gateway provides several advanced metadata mapping features:

- **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 can 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.

This section describes these three features, along with a fourth: defining constant data for certain elements.

Record Blocking

Our sample Gateway Images collection includes some digital content that has been contributed by the Jones Middle School. We have recorded the contributor information in the Dublin Core contributor metadata field.

Jones Middle School has requested that their content be excluded from WorldCat. We can do this by using the record blocking feature.

1. From the **More** pull-down menu, select **Update record blocking list**.

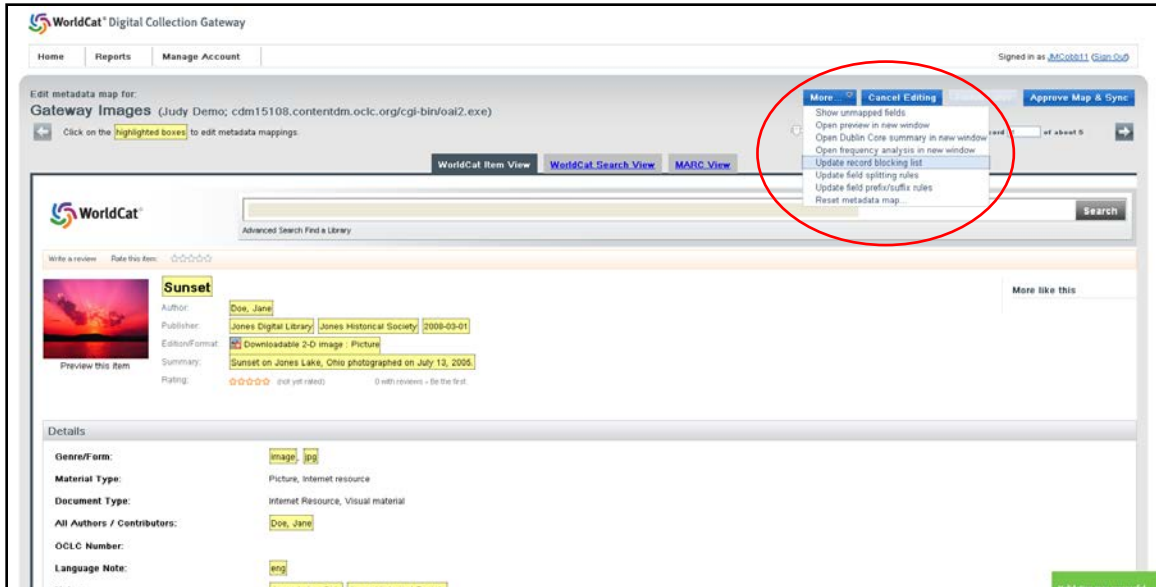


Figure 39: Update Record Blocking list

- To block records based on the data values in a particular field, select the field from the pull-down list in Step 1.

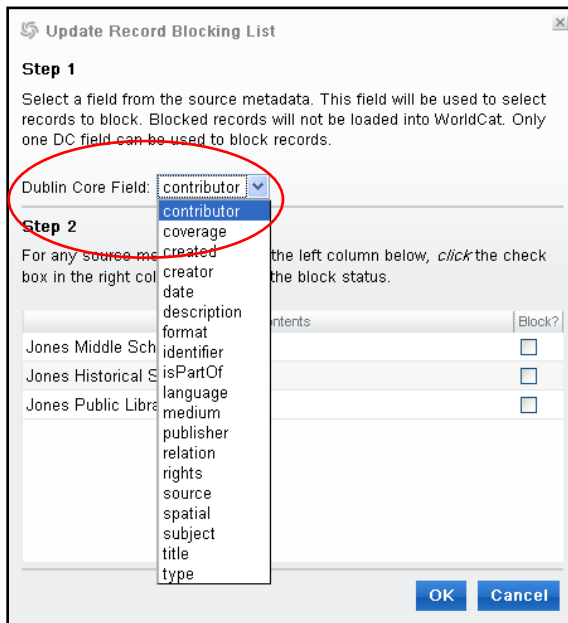


Figure 40: Choose a field and values to Block harvest

Here, we have selected contributor, which will allow us to block records for which the contributor element contains the text "Jones Middle School."

- Step 2 displays all data values that appear in the contributor field for records in this collection. To block all records having a certain data value, click the corresponding box.

Update Record Blocking List

Step 1
Select a field from the source metadata. This field will be used to select records to block. Blocked records will not be loaded into WorldCat. Only one DC field can be used to block records.

Dublin Core Field: contributor

Step 2
For any source metadata value in the left column below, *click* the check box in the right column to change the block status.

Field Contents	Block?
Jones Public Library	<input type="checkbox"/>
Jones Middle School	<input checked="" type="checkbox"/>
Jones Historical Society	<input type="checkbox"/>

OK Cancel

Figure 41: Selecting one value for Contributor field

4. Click **OK**.
5. When this collection is synchronized with WorldCat, all records that contain the text "Jones Middle School" in the contributor field will be excluded from WorldCat.

Field Splitting

In the Gateway Images collection, the Dublin Core subject field contains multiple data elements separated by semi-colons.

By default, the Gateway maps the entire subject field to a single field (653) in WorldCat. This example shows how to split the field into multiple fields based on the semi-colon delimiter.

1. Select the **MARC View** tab. In this view, you can see how the subject field is mapped by default.
2. From the **More** pull-down menu, select **Update field splitting rules**.

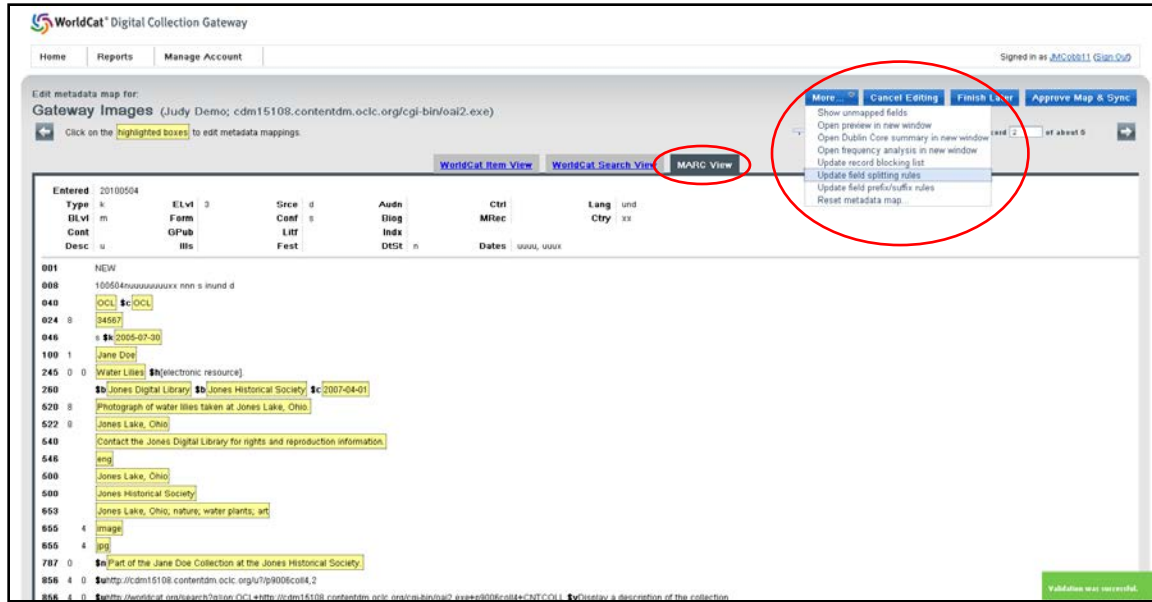


Figure 42: Update field splitting rules

3. Select the field you want to split (subject) from the pull-down list, then enter the delimiter (a semi-colon):

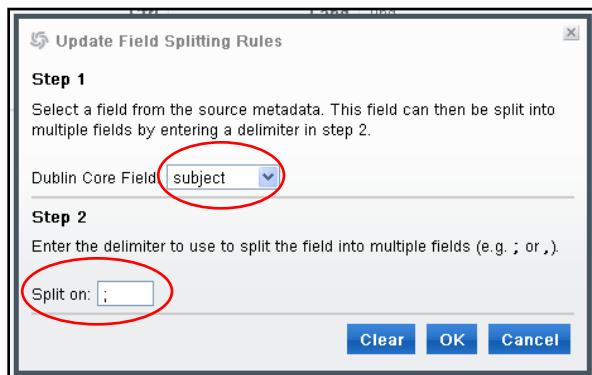


Figure 43: Choose a field and its delimiter

4. Click **OK**.
5. As shown below, the subject field has now been split into multiple MARC 653 fields. If necessary, you can edit the field indicators in the MARC view as appropriate.

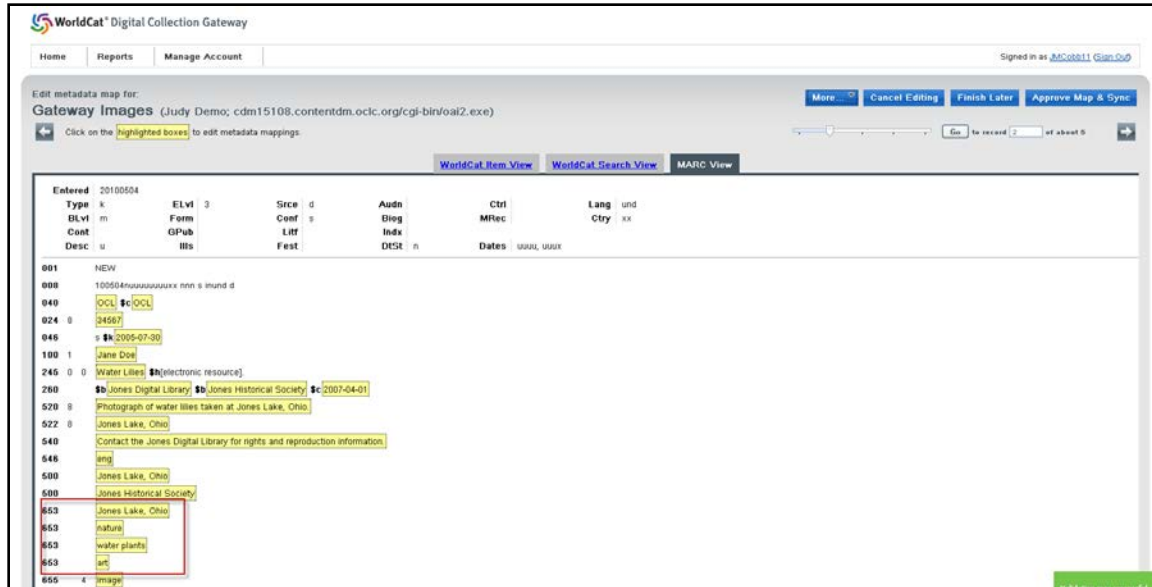


Figure 44: MARC record view showing Field is split

Adding a Prefix and/or Suffix to a Field

The Gateway Images sample collection includes two Dublin Core publisher fields. The first publisher field includes the name of the organization that is publishing the item in digital format (“Jones Digital Library”). To provide better contextual information for WorldCat users, we want to change the field to “Jones Digital Library, Jones County, Ohio, USA.” Let’s look at how you’d do this with the Gateway.

1. From the **More** pull-down menu, select **Update field prefix/suffix rules**.

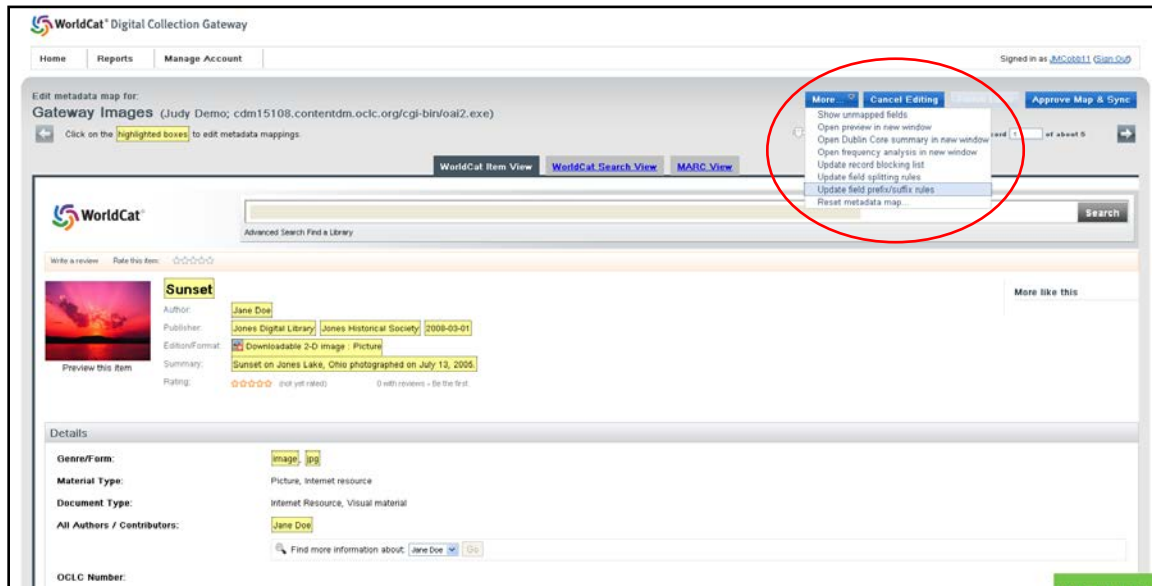


Figure 45: Update field prefix/suffix rules

2. In Step 1, use the pull-down menu to select the field for which you want to add a prefix or suffix (here, publisher).

Figure 46: Add a suffix to the first occurrence of the field

The Gateway “numbers” your metadata fields in order to distinguish among multiple fields that are mapped to the same Dublin Core element. In Step 2, select “1”, this tells the Gateway to apply your changes to the first occurrence of the publisher field.

3. In Step 3, enter the text you want used as the prefix or suffix for the field – here, the suffix (without the quotes) “, Jones County, Ohio, USA.” To ensure appropriate spacing and punctuation in the field, include commas and spaces as needed.
4. Click **OK**.
5. The Publisher 1 field now contains the additional text appended to the end of the data.

Figure 47: Field with suffix

You can also use prefixes or suffixes 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.

Using Constant Data

When there are elements that need the same value for all the records in a single collection, you can define constant data – predefined values for those elements. For example, when all of the metadata

records should contain the same Dublin Core source data, and your original metadata does not contain that element in the Dublin Core source field, you may want to provide a constant data value for the source element.

1. From the **More** pull-down menu, select **Update constant data fields**.

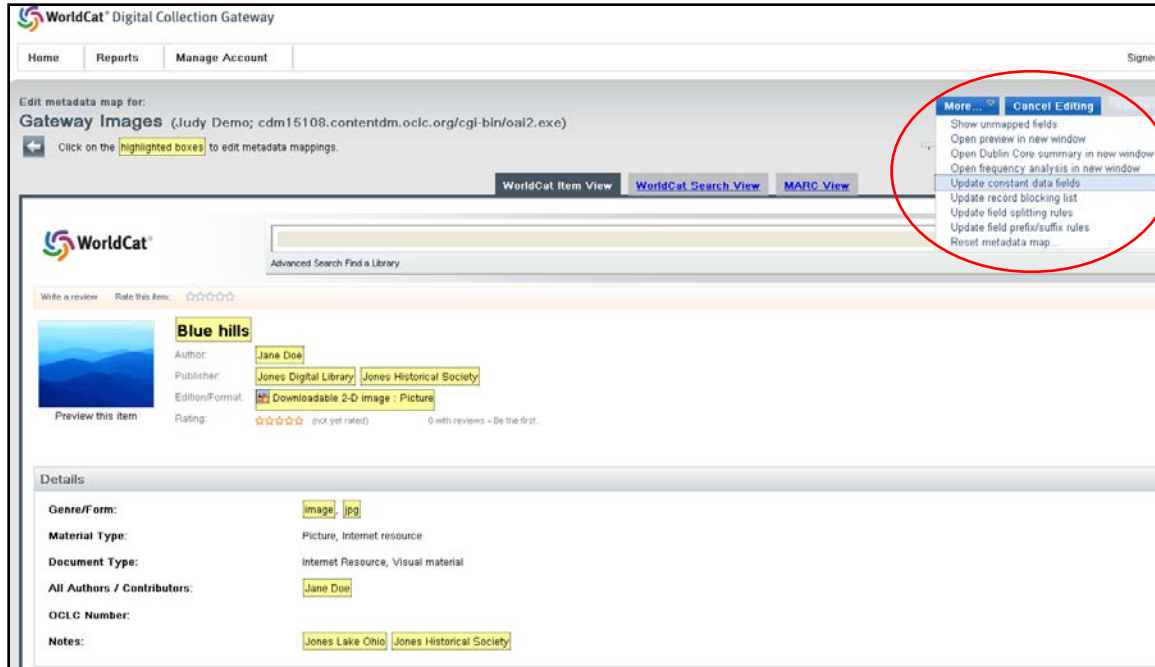


Figure 48: Use constant data as value of a field

2. Enter the constant data that you want to display in the appropriate Dublin Core element field. In the following example, we enter "Digital collection created by the Jones Digital Library, Jones County, Ohio, USA." in the source field.

Update Constant Data Lists

Step 1
Edit the constant data (if any) to be inserted into the metadata fields below.

Dublin Core Field Constant Data

dc:title	<input type="text"/>
dc:creator	<input type="text"/>
dc:subject	<input type="text"/>
dc:description	<input type="text"/>
dc:publisher	<input type="text"/>
dc:contributor	<input type="text"/>
dc:date	<input type="text"/>
dc:type	<input type="text"/>
dc:format	<input type="text"/>
dc:identifier	<input type="text"/>
dc:source	Digital collection created t
dc:language	<input type="text"/>
dc:relation	<input type="text"/>
dc:coverage	<input type="text"/>
dc:rights	<input type="text"/>

Step 2
Save with "OK", or cancel.

Clear OK Cancel

Figure 49: Enter string to display in DC.Source

3. Click **OK** to save the constant data. The record will display with the constant data in the source field.

Edit metadata map for: Gateway Images (Judy Demo; cdm15108.contentdm.oclc.org/cgi-bin/oa12.exe)

WorldCat Item View WorldCat Search View MARC View

WorldCat

Advanced Search Find a Library

Write a review Rate this item: ☆☆☆☆

Blue hills More like this

Author: Jane Doe
 Publisher: Jones Digital Library, Jones Historical Society
 Edition/Format: Downloadable 2-D image, Picture
 Rating: ☆☆☆☆ (not yet rated) 0 with reviews - Be the first.

Details

Genre/Form: image, jpg
 Material Type: Picture, Internet resource
 Document Type: Internet Resource, Visual material
 All Authors / Contributors: Jane Doe
 OCLC Number:
 Notes: Jones Lake Ohio, Jones Historical Society

Languages: Deutsch | English | Español | Français | Nederlands | 中文
 View: Sign In | Register My Account | My Lists | My Watchlist | My Reviews | My Tags | My Saved Searches

Figure 50: Source data does not display in WorldCat Item View...

4. Notice that the source constant data does not appear in the WorldCat Item View. By default, the Dublin Core source element was mapped to a MARC field that does not show in the brief record in the WorldCat.org interface. However, when you select the MARC View, you can verify that the source constant data is in the record (in field 786).

Edit metadata map for:
Gateway Images (Judy Demo; cdm15108.contentdm.oclc.org/cgi-bin/oi2.exe)

Click on the highlighted boxes to edit metadata mappings.

WorldCat Item View WorldCat Search View **MARC View**

Entered	20100525	ELVI	3	Src	d	Audn	Ctrl	Lang	und
Type	k	Form		Conf	s	Blng	MRec	Ctry	xx
BLVI	m	GPub		Litf		Indx			
Cont		Ills		Fest		DtSt	n	Dates	uuuu, uuuu
Desc	u								
001	NEW								
008	100525nnuuuuuuuuu nnn s inuud d								
040	OCL \$c OCL								
046	s \$k 2003								
245	0 0 Blue hills \$h [electronic resource].								
260	\$b Jones Digital Library \$b Jones Historical Society								
500	Jones Lake Ohio								
500	Jones Historical Society								
653	hills, art, photography								
655	4 image								
655	4 jpg								
720	Jane Doe \$f cre								
786	0 8 \$n Digital collection created by the Jones Digital Library, Jones County, Ohio, USA.								
787	0 \$n Part of the Jane Doe collection at the Jones Historical Society								
856	4 0 \$u http://cdm15108.contentdm.oclc.org/u/?p9006coll4,5								
856	4 0 \$u http://worldcat.org/search?q=on:OCL+http://cdm15108.contentdm.oclc.org/cgi-bin/oi2.exe+p9006coll4+CNTCOLL \$y Display a description of the collection								
029	0 OCL \$boai:cdm15108.contentdm.oclc.org:p9006coll4/5 \$chttp://cdm15108.contentdm.oclc.org/cgi-bin/oi2.exe p9006coll4 \$tCNTNT								

Figure 51: ...but DC.Source does display in MARC 786

- If you want to display the Dublin Core source constant data in the WorldCat.org Item View, you can re-map it to another field.

Switching between views

Throughout this tutorial, we've used the WorldCat Item View to examine the metadata map. You can click the tabs at the top of the window to switch between views:

- MARC View** shows the record with its corresponding MARC tags. In the MARC View, you can replace and add elements using the same method described above for WorldCat Item View.

Edit metadata map for:
Gateway Images (Training)

Click on the highlighted boxes to edit metadata mappings.

WorldCat Item View WorldCat Search View **MARC View**

Entered	20100217	ELVI	3	Src	d	Audn	Ctrl	Lang	und
Type	k	Form		Conf	s	Blng	MRec	Ctry	xx
BLVI	m	GPub		Litf		Indx			
Cont		Ills		Fest		DtSt	n	Dates	uuuu, uuuu
Desc	u								
001	NEW								
008	100217uuuuuuuuuuu nnn s inuud d								
040	OCL \$c OCL								
046	s \$k 2003								
245	0 0 Blue hills \$h [electronic resource].								
246	3 3 Blue hills								
260	\$b Jones Digital Library								
520	8 A sample image for training								
500	Jones Lake Ohio								
500	Jones Historical Society								
653	hills, art, photography								
655	4 image								
655	4 jpg								
720	Jane Doe \$f cre								
787	0 \$n Part of the Jane Doe collection at the Jones Historical Society								
856	4 0 \$u http://cdm15108.contentdm.oclc.org/u/?p9006coll4,5								
856	4 0 \$u http://worldcat.org/search?q=on:OCL+http://cdm15108.contentdm.oclc.org/cgi-bin/oi2.exe+p9006coll4+CNTCOLL \$y Display a description of the collection								
029	0 OCL \$boai:cdm15108.contentdm.oclc.org:p9006coll4/5 \$chttp://cdm15108.contentdm.oclc.org/cgi-bin/oi2.exe p9006coll4 \$tCNTNT								

Figure 52: MARC view

- **WorldCat Search View** illustrates what the display of this record will look like in the search results list in WorldCat.org. You can replace and add elements using the same method described above for WorldCat Item View.

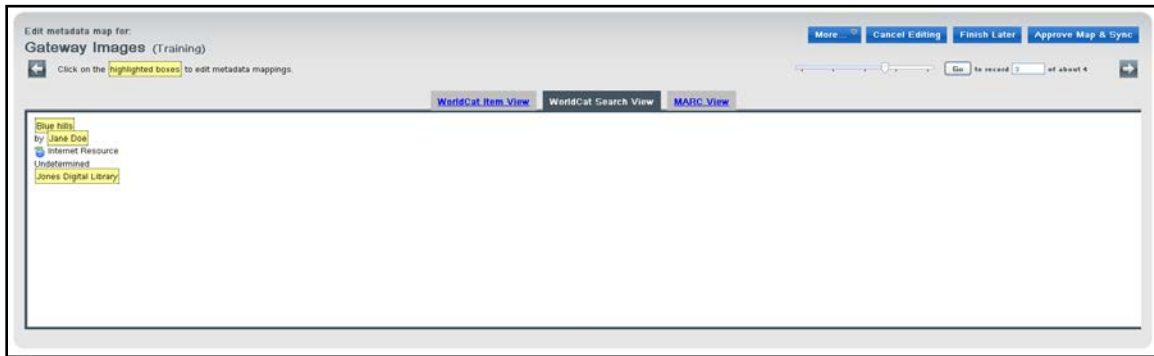


Figure 53: WorldCat Search result elements displayed

- To see the **WorldCat Item View** without highlighting or other graphics, click **More**, then select **Open Preview in New Window** from the pull-down menu.

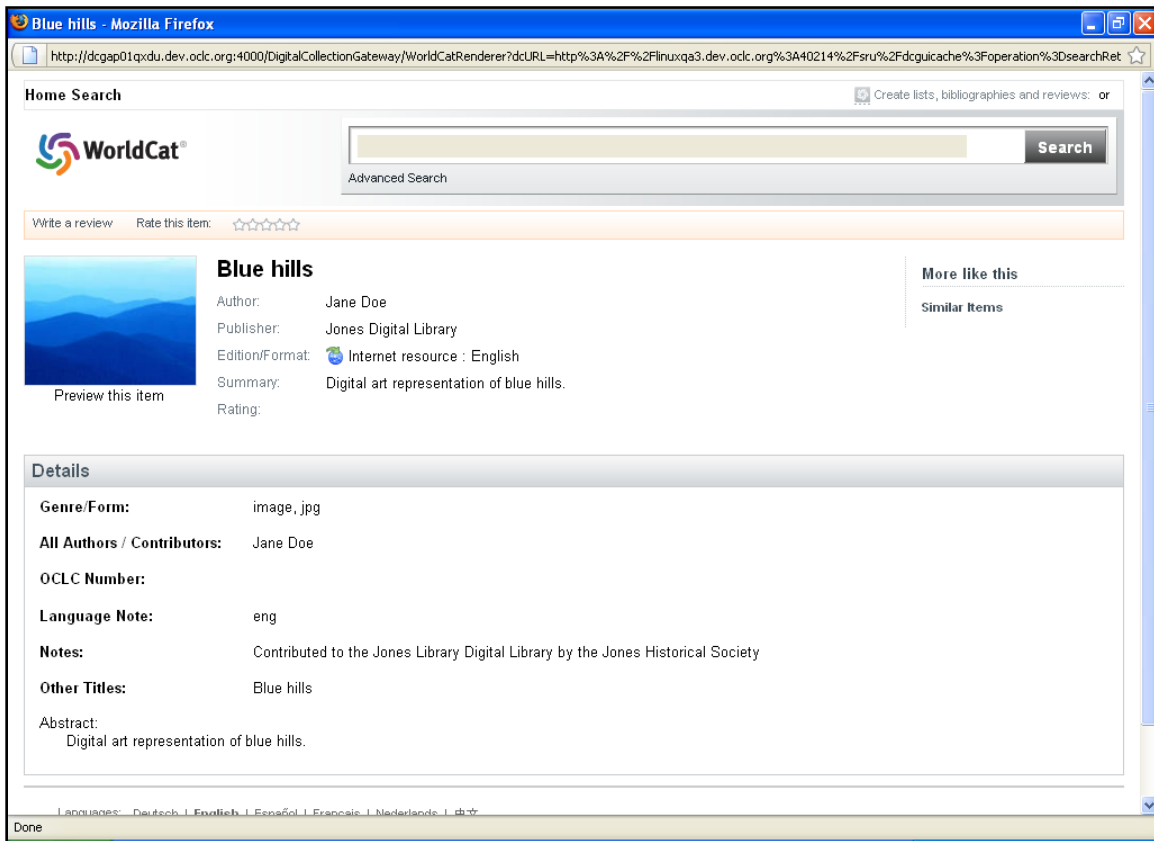


Figure 54: WorldCat Item View preview

Analyzing the collection metadata

The More menu contains two options to help you analyze and understand the collection metadata.

More > Open Dublin Core Summary in new window

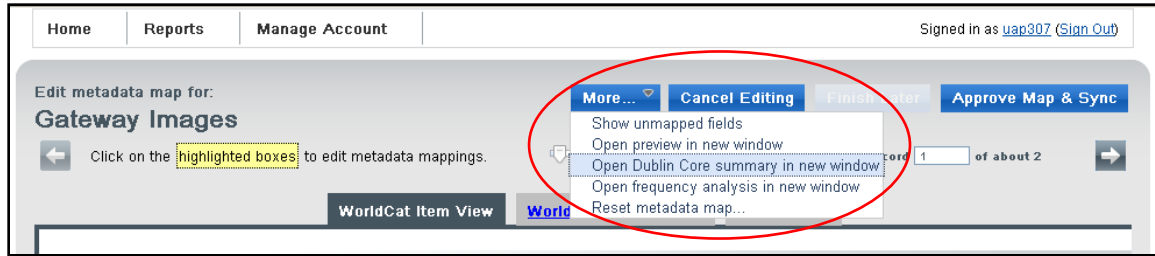


Figure 55: Open Dublin Core summary

Displays a list of the metadata elements used in this collection, and how often each element occurs.

Digital Collection Gateway - Dublin Core Summary - Mozilla Firefox

http://dcdgap01qxdu.dev.oclc.org:4000/DigitalCollectionGateway/dc_summary.jsp?batchID=44ee908%3A1250942ce51%3A-7ff0

Element name	Total occurrences	Records with one or more occurrences	Records with multiple occurrences
contributor	2	2	0
coverage	1	1	0
coverage.spatial	1	1	0
creator	2	2	0
date	2	2	0
date.created	2	2	0
description	2	2	0
format	2	2	0
format.medium	1	1	0
identifier	4	2	2
language	2	2	0
publisher	2	2	0
relation	1	1	0
relation.isPartOf	2	2	0
rights	2	2	0
source	1	1	0
subject	2	2	0
title	2	2	0
type	4	2	2

Figure 56: Default view of the Dublin Core Summary

More > Open frequency analysis in new window

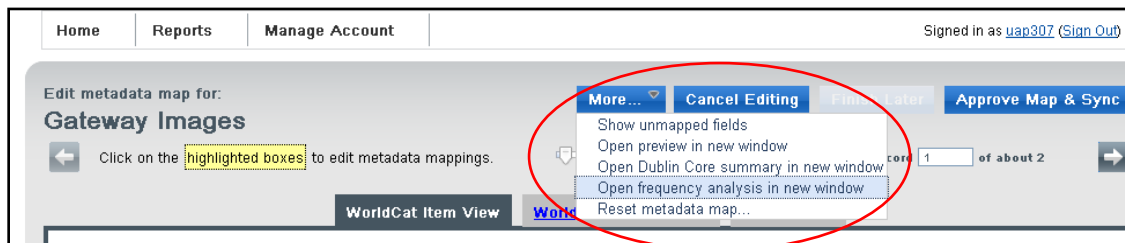


Figure 57: Open frequency analysis

In the Frequency Analysis window, you can click on any metadata element to see its data values and the number of occurrences of each value in the collection.

	Value	Occurrences
contributor	Contributed to the Jones Library Digital Library	1
	Jones Historical Society	1

Figure 58: Occurrences of specific values in selected field in this collection

Section 7: Synchronization with WorldCat

After you have completed the metadata mapping, you can approve the map and initiate synchronization of your collection with WorldCat.

1. To save the mapping and begin synchronization with WorldCat, click **Approve Map & Sync** (at the upper right of the metadata mapping window).

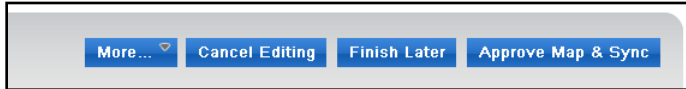


Figure 59: Options—Approve Map and Sync

- To save the mapping without initiating a sync with WorldCat, click **Finish Later**.
 - To abandon all changes made during this editing session, click **Cancel**.
2. In the Approve & Sync confirmation dialog, click **OK** to save the metadata map and begin a WorldCat sync. This step initiates the adding of your records to WorldCat, and sets holdings on those records. (Your sync may be queued if the system is under heavy load.)

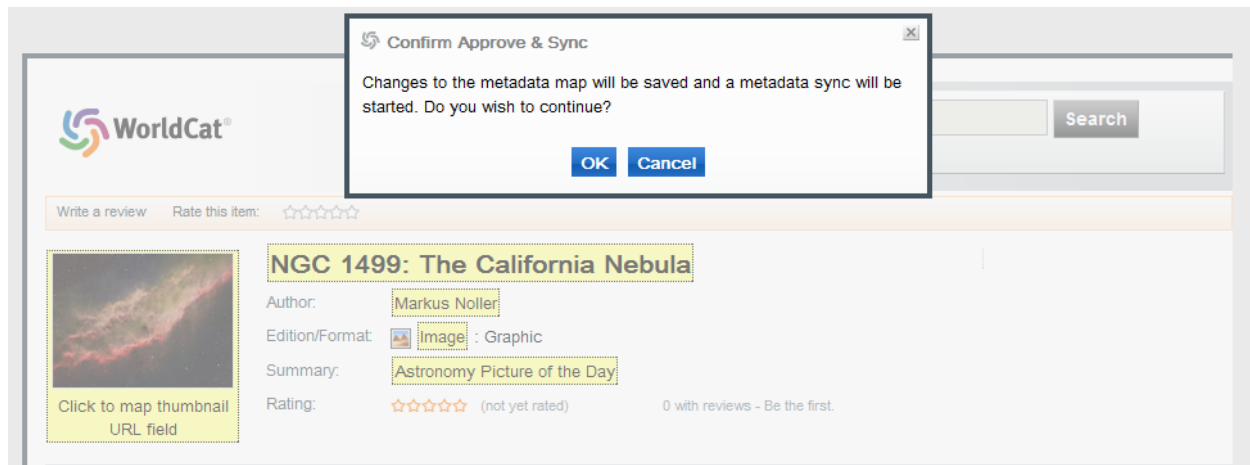


Figure 60: Confirmation that metadata map saved and WorldCat sync is queued

3. The Gateway returns to the Home tab. Note that the status of your collection has changed to Syncing.

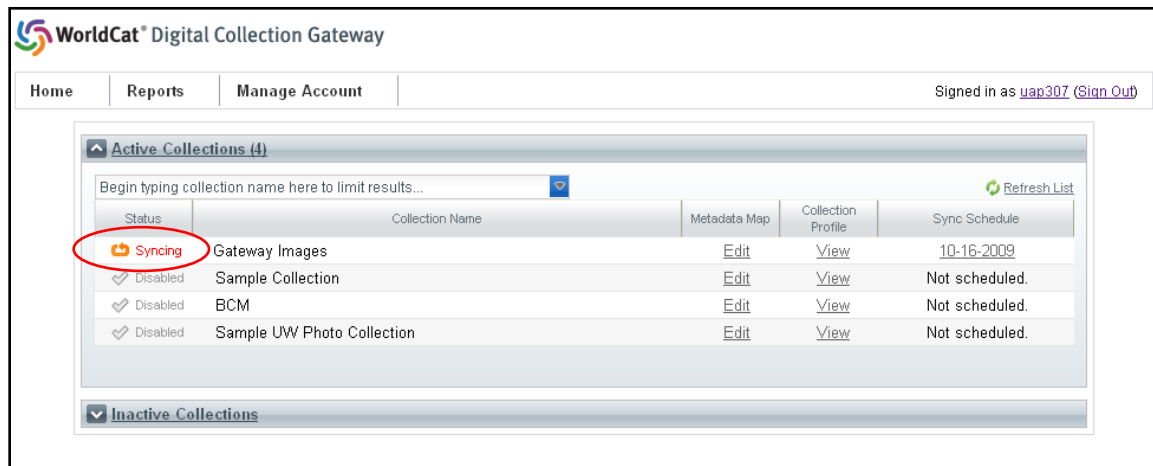


Figure 61: Sync in process for the Gateway Images collection

When the sync is complete, the status changes to Enabled.

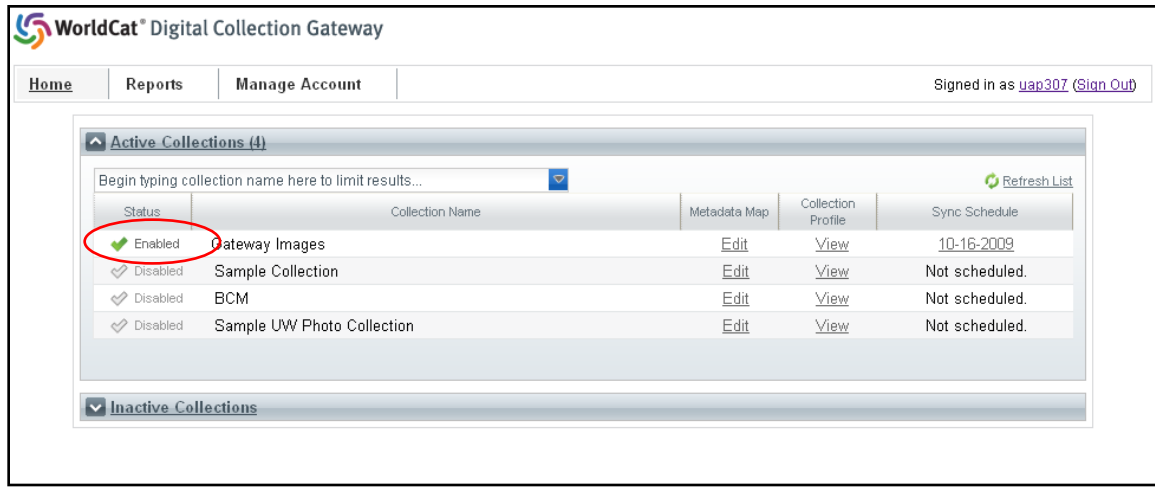


Figure 62: Notification that sync has completed

After this first synchronization has completed, the collection will be scheduled to be synchronized every three months.

Changing the default schedule

1. To change the sync schedule, **View** the Collection Profile.
2. In the Sync Details area, click the **Edit Sync Schedule** link.

Collection Details

Collection Identifier	myfirstcollection
Collection Display Name	<input type="text" value="CONTENTdm 6 Demonstration Gateway"/>
Active	Yes
WorldCat Record Processing	<input checked="" type="radio"/> Replace All <input type="radio"/> Add New Only
	Help
OCLC Symbol	<input type="text" value="DCMWG"/>
OCLC Symbol Display Name	DIGITAL COLL SERVS METADATA WORKING G
Include collection-level record in WorldCat?	<input checked="" type="radio"/> Yes Preview collection-level record in Worldcat display. <input type="radio"/> No
Metadata Format	<input type="text" value="OCLC Dublin Core"/> ▼

[Save](#) [Cancel](#)

Sync Details

Last Scheduled Sync	06-30-2012
Next Scheduled Sync	09-21-2012

[View Sync History](#)

WorldCat Syncs Frequency	quarterly
Latest Sync Status	View Report

[Edit Sync Schedule](#)

Figure 63: Editing the collection profile

3. In the Set Sync Schedule section, click the button that corresponds to your synchronization schedule: monthly, quarterly (the default), biannually, or annually.
4. To select a specific date to begin the synchronization schedule, 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.

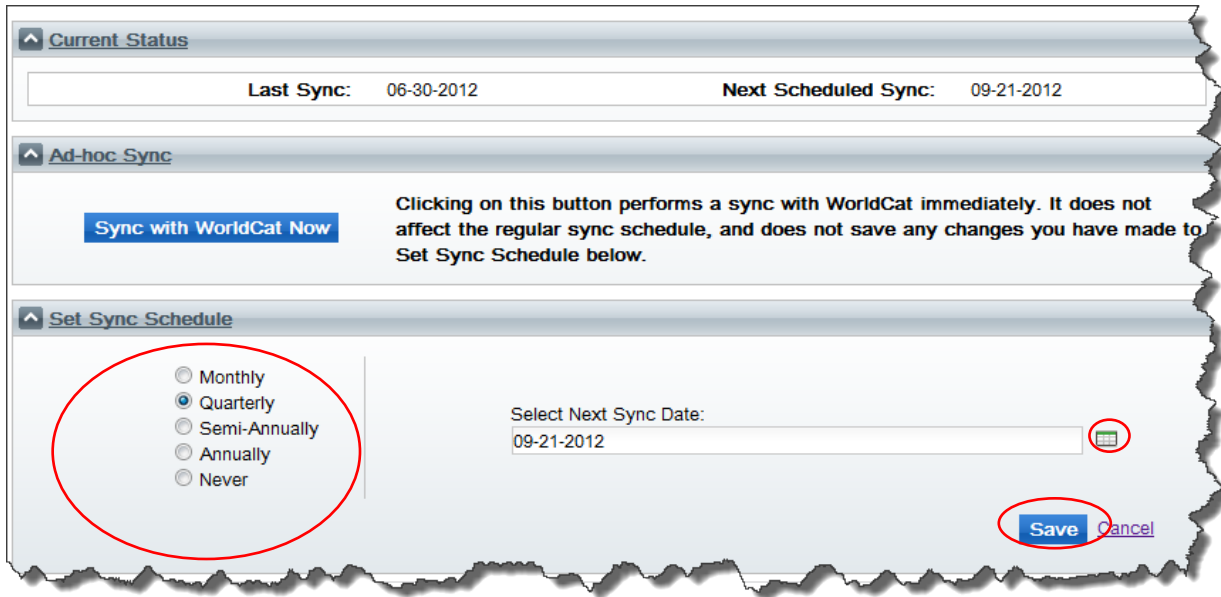


Figure 64: Changing the collection sync schedule

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

Note: You can synchronize with WorldCat at any time by clicking **Sync with WorldCat Now**. This action does not alter 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.

Section 8: View Synchronization Results

After the Gateway finishes synchronizing your collection (that is, the collection has a status of Enabled on the Home tab), you can use the Reports tab to view a summary 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 warning may be issued when a record loaded by using Connexion doesn't get replaced in WorldCat.
- Records with errors. There are two types of errors:
 - An error indicating a problem that prevented the metadata in a record from loading into WorldCat. This problem must be fixed or the record will never load into WorldCat.
 - An error indicating a system problem that occurred during the processing and may not be related to the metadata in the record. If you encounter this type of error, report it to support@oclc.org.

Click the **Reports** tab, or enter through the Collection Profile/View Report

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

Collection Name	Type	Date	View	Download
Gateway Images	WorldCatSync	Jul 16 2009 03:54 PM UTC-0400	View	XML Excel
Sample Collection	WorldCatSync	Jun 26 2009 01:04 PM UTC-0400	View	XML Excel
BCM	WorldCatSync	Jun 26 2009 01:04 PM UTC-0400	View	XML Excel
BCM	WorldCatSync	Jun 26 2009 09:41 AM UTC-0400	View	XML Excel
Sample UW Photo Collection	WorldCatSync	May 27 2009 03:04 PM UTC-0400	View	XML Excel

Figure 65: Gateway Reports tab

1. To view reports for a specific collection, you can use the **Collection Name Filter** to select a collection.
2. The Report Type Filter (WorldCat Sync) is selected for you automatically.
3. To see reports from a specific date or date range, click in the upper **Date Range Filter** box. When the calendar appears, click to select the start date.
4. Click in the lower **Date Range Filter** box. When the calendar appears, click to select the end date.
 - To view reports from a single date, make sure that the end date is the same as the start date.

5. To sort on the data in the columns of the report, click on the **column heading** by which you want to sort. When a small arrow appears, click on the arrow to sort in ascending or descending order.
6. Click **View** to view a report in a browser window.
 - If you prefer to download a report in **XML** or **Excel** format, click the corresponding link.

As shown here, each report begins with a summary of the sync, showing collection-level record harvest (if appropriate), then a batch processing summary of the items harvested, cross-walked, replaced, added, skipped, etc.

WorldCatSync Report	
Batch Id	-194415ad:1365c422cb7:-5b6e
Collection Identifier	cern:ds:THESES
Collection Display Name	HEP theses
Repository URL	http://cdsweb.cern.ch/oa12d
Worldcat setting	Replace All
Sync start date/time	2012-04-16 20:03:08.0
Sync end date/time	2012-04-16 20:07:22.0
Collection Record Summary	
Harvested	No
Crosswalked	No
Validated	No
Loaded to Worldcat	No
OCLC Number	N/A
Holding Added	No
Batch Processing Summary	
Records harvested	1990
Harvest Completion	Complete
Records xwalked	1990
Records validated	1844
Records loaded to WC	148
Records Added	11
Records Replaced	137
Records Skipped	1696

Figure 66: The summary portion of an individual collection sync report

A detailed portion follows, offering a .txt file listing records with their OAI identifiers and displaying the counts and texts of any error messages. At the end of the month, another summary report is run showing activity for the entire repository—in sum, and subtotaled by collection.

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 **Harvesting**.

If you have sync'd successfully to WorldCat, you will see a notification, indicating you have OCLC numbers ready to sync back into in one or more CONTENTdm collections.

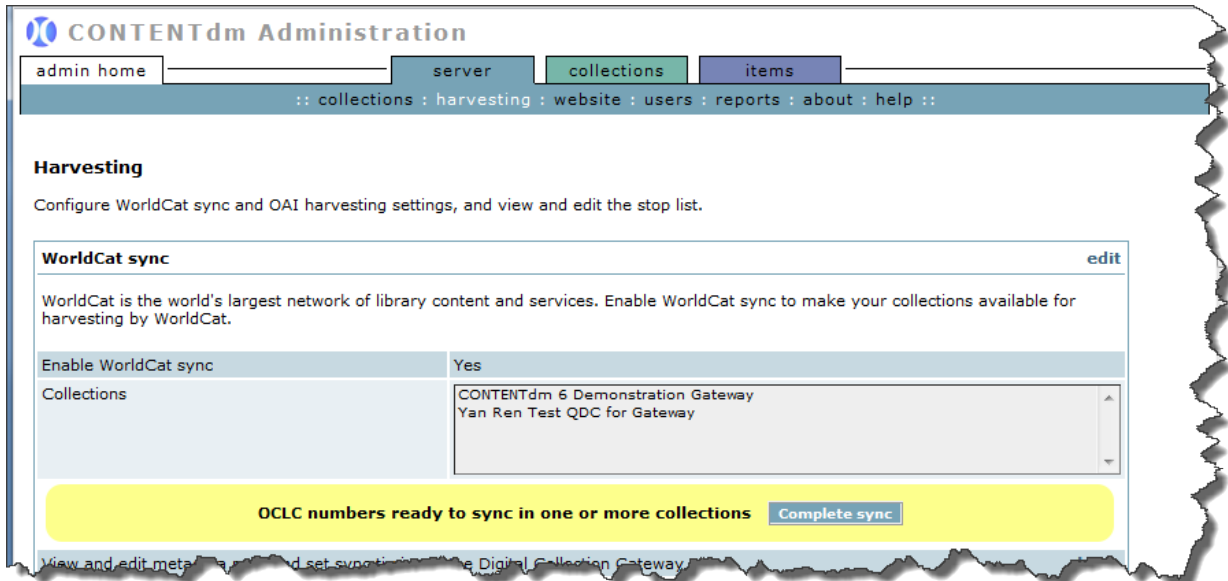


Figure 67: In CONTENTdm Administration, harvesting shows sync status

4. Click **Complete Sync**.
5. A new browser window opens and displays a list of collections

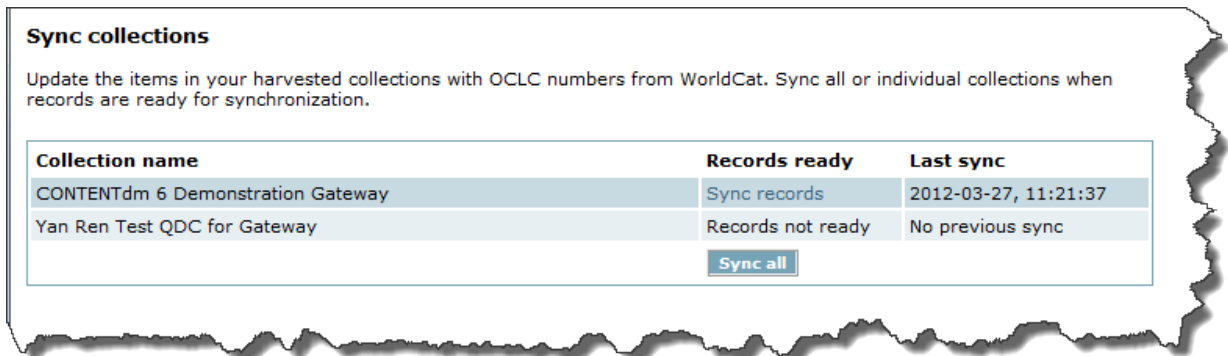


Figure 68: Collection list shows options available

6. 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.

7. When the sync is complete, the page updates, with a status of **Complete**. When returning to the Harvesting screen, the message will let you know that a **Sync** is not needed.

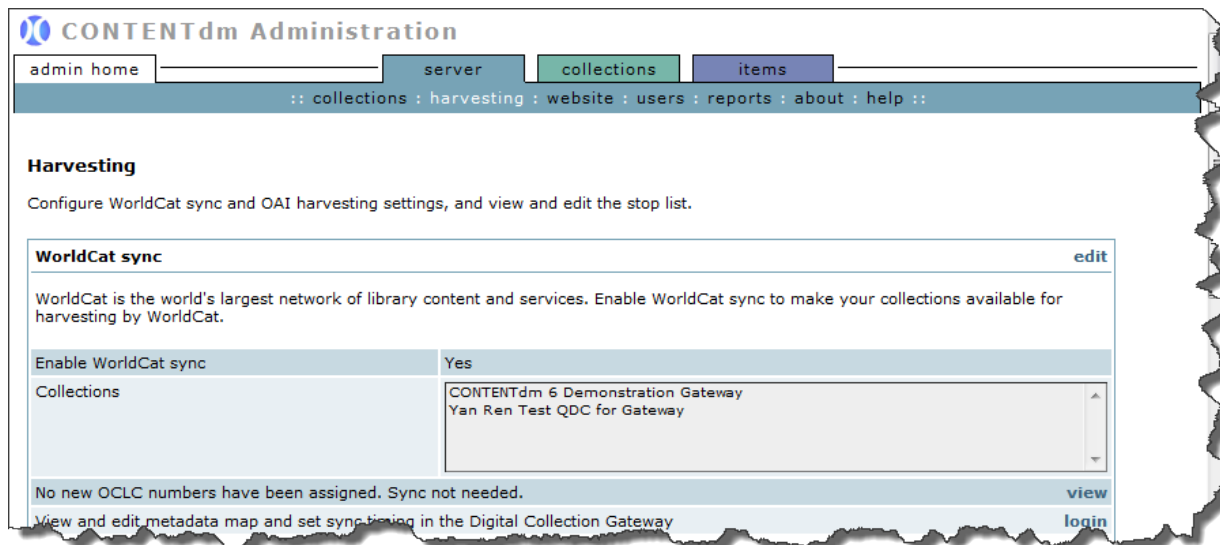


Figure 69: When returned to Harvesting, note that no sync needed at this time

For Further Learning

Here are some resources to help you learn more about using the Gateway to upload your metadata to WorldCat:

- **WorldCat Digital Collection Gateway web session**

Listen, watch, and learn how to use the Gateway. This pre-recorded orientation Web session walks you through the Gateway workflow.
- **WorldCat Digital Collection Gateway frequently asked questions**

Read answers to commonly asked questions about using the Gateway.
- **Best Practices for CONTENTdm and other OAI-PMH compliant repositories: creating sharable metadata**

Learn about optimized and standardized Qualified Dublin Core metadata element sets to increase the discoverability of your metadata in the local environment and across open access repositories such as WorldCat.org.