



# Planning Guide WorldCat Local and WorldCat Local “quick start”



Congratulations on your decision to make WorldCat Local™ or WorldCat Local “quick start” your library’s discovery and delivery solution. The following guide will help ensure a smooth transition as you begin to integrate WorldCat Local or WorldCat Local “quick start” with your current library systems.

## WorldCat holdings

The most important step you can take in preparation for WorldCat Local or WorldCat Local “quick start” is to make sure that the majority of your library’s collections are represented in the WorldCat® database. Access to all formats of materials in your library collections will ensure that users find the information they need when using your library’s WorldCat Local search box.

Whether you use Batch Processing, a custom cataloging project or on-site cataloging by library staff, the sooner your holdings are represented in WorldCat the sooner your library users can enjoy the benefits of WorldCat Local or WorldCat Local “quick start.”

A great place to start is to arrange for a retrospective batchload of your entire library collection into WorldCat. Even if you add your holdings to WorldCat on a regular basis, a retrospective batchload will fill in any gaps in your current WorldCat holdings. OCLC provides one retrospective batchload at no charge for all WorldCat Local and WorldCat Local “quick start” libraries.

## Batchloading

WorldCat Local and WorldCat Local “quick start” libraries that meet the criteria listed below may use the OCLC® Online Service Center at [www.oclc.org/servicecenter/](http://www.oclc.org/servicecenter/) to submit their batchload requests.

The criteria for submitting batchload requests for WorldCat Local and WorldCat Local “quick start” are:

- The project will set holdings for a single OCLC institution symbol
- It is a one-time project
- Your records are in MARC 21 format
- Character encoding in the records is MARC-8 or UTF-8 Unicode
- Records are sent to OCLC only electronically via transfer to an OCLC Electronic Data Exchange account or via upload to the OCLC Product Services Web
- The project is limited to 10 million or fewer records
- You do not need to receive full OCLC-MARC records as the output of your batch project

- Acceptable output of the project is an XREF report (a list of OCLC numbers across from the corresponding local record number) or your library’s records returned with OCLC numbers added.

Libraries that do not meet these criteria may use the standard batchload order form at <http://www3.oclc.org/app/batchload>.

If you would like OCLC to seek permission to load vendor records for your planned WorldCat Local or WorldCat local “quick start” implementation, contact your OCLC representative.

## Keep your WorldCat holdings up-to-date

Once your library’s holdings are in WorldCat, it is important to keep them up-to-date. Guarantee library users receive the most current information about your collections by scheduling daily batchloads of new or changed records.

You can contribute your library’s holdings to WorldCat on an ongoing basis by using any of OCLC’s cataloging services. OCLC can also help you add nonbook formats, including:

- **eSerials** —The OCLC eSerials Holdings™ service automates the process of setting and maintaining holdings for ISSN-based electronic serials. This helps library users and staff more easily find and use the electronic serials in your library collection.

Accurate holdings information for your collection is increasingly important as OCLC continues to add article-level records to WorldCat. OCLC has added more than 56 million article records from familiar services, such as GPO Monthly Catalog, ArticleFirst®, MEDLINE, ERIC, the British Library and Elsevier. OCLC has announced the upcoming addition of records from MLA and H.W. Wilson, and will continue to enhance the WorldCat database with article-level records from additional sources.

OCLC partners with EBSCO, Serials Solutions and TNet to automate the process of setting and maintaining your holdings for electronic serials in WorldCat. Libraries that subscribe to WorldCat Link Manager™ may also choose to set holdings automatically through the service. Whether you work with one of the providers listed or submit holdings directly into WorldCat, the service exposes your electronic serials collection more fully through online search tools and interlibrary loan applications—all without adding to your cataloging workload.

The eSerials Holdings service is provided at no charge to all OCLC member libraries. Order it through the Online Service Center. For more information, visit [www.oclc.org/us/en/eserialsholdings](http://www.oclc.org/us/en/eserialsholdings).

- **eContent records for NetLibrary® eBooks and Electronic Collections Online™ eJournals**—OCLC provides OCLC-MARC cataloging records at no additional cost to libraries that subscribe to Electronic Collections Online eJournals or order eBooks or eAudiobooks from NetLibrary. This simplifies the integration of eContent into your library’s workflow and increases the visibility of these resources to Web searchers.
- **Digital content records**—OCLC’s CONTENTdm® service supports the delivery of access to digital content available in library collections.

## Vendor records

WorldCat Local vendor records are records that a WorldCat Local subscriber or WorldCat Local “quick start” library has licensed (usually in conjunction with associated content) for use in its catalog. Publishers of these records have restricted redistribution of the records by libraries to other sources, including OCLC.

OCLC contacts publishers on behalf of WorldCat Local and WorldCat local “quick start” libraries to obtain agreements for the addition of vendor records already licensed by libraries to WorldCat.

Please visit [www.oclc.org/us/en/worldcatlocal/support/vendor.htm](http://www.oclc.org/us/en/worldcatlocal/support/vendor.htm) for a list of vendor record sets for which agreements are currently in effect, and a form you can complete to request permission from additional vendors. This site will be updated as additional agreements are obtained.

If your library already licenses vendor record sets for which OCLC has obtained permission to surface through WorldCat Local or WorldCat local “quick start,” initiate a batchload request to have your library’s holdings symbol added to the sets.

## Automatic record enhancement

The Bibliographic Record Notification™ service compares all upgraded OCLC-MARC records to the records your library has holdings attached to on a daily basis, and then sends you upgraded records based on your library’s profile.

Bibliographic Record Notification is available at no extra charge to libraries with cataloging subscriptions. You can submit an order through the Online Service Center or download an order form at [www.oclc.org/support/forms/pdf/bibnot.pdf](http://www.oclc.org/support/forms/pdf/bibnot.pdf).

## Index OCLC numbers

OCLC numbers must be present in your local catalog for linking between WorldCat Local and your catalog to occur. This link facilitates the display of item availability information and the option for users to place holds on needed resources. The OCLC number must be indexed within your ILS. Libraries that have not indexed OCLC numbers can work with OCLC to add this index through a reclamation project.

If your library uses Z39.50 for searching you may also need to index OCLC numbers as a search option in your Z39.50 server. Contact your OCLC representative to discuss inclusion of Z39.50 access in your WorldCat Local implementation.

See additional information about OCLC Control numbers: [www.oclc.org/us/en/batchprocessing/controlnumber.htm](http://www.oclc.org/us/en/batchprocessing/controlnumber.htm).

## Detailed serials information

To effectively deliver accurate serials ownership information to your users, you must have a summary-level record for each serial title in your local catalog. This level of detail tells users which issues are available for use from your library’s collection. If your library is currently cataloging serials by creating a separate record for each year of a serial title, it is imperative that you modify this practice as well as existing records to consolidate information about serials titles at the summary-level record. Contact your ILS provider for assistance in adding summary-level record information to your local catalog.

## Visible branch ownership

The most effective WorldCat Local implementation clearly indicates which location(s) of your library own(s) specific resources. In order for this to happen, individual branch holdings must be represented in WorldCat under a unique OCLC symbol.

If your library currently indicates branch library holdings in the local holdings field of your catalog records (MARC field 049), you will need to work with OCLC to create records that represent branch-level collections at the OCLC symbol level. Your OCLC representative can provide additional information about how to proceed with this work.

If your library does not currently indicate branch library holdings, contact OCLC for assistance.

NOTE: Visibility of branch holdings is included in subscriptions to the WorldCat Local service. Branch holdings are not visible in WorldCat Local “quick start.”

## Consider local cataloging practices

Current cataloging practices within your library or group will impact the success of users searching for items within WorldCat Local and WorldCat Local “quick start.” Review local practices to make sure they support full visibility of your collections in WorldCat.

Attaching a unique symbol for your library to records for items in your collections ensures their visibility in WorldCat Local and WorldCat Local “quick start.”

## Branding your library

WorldCat Local and WorldCat Local “quick start” support interface customization in ways that best represent your library. When thinking about branding your implementation, consider the name and logo that will appear on the interface.

Create a name for your WorldCat Local or WorldCat local “quick start” that makes sense and is easy to remember. The name can

be up to 40 characters long. You may also want to place your library or group logo on the interface.

WorldCat Local and WorldCat Local “quick start” logo files should meet the following specifications:

- Logo URL must begin with <http://>
- No longer than 255 characters
- No larger than 80 pixels high by 275 pixels wide (larger images will be automatically resized).

## Authentication

Authenticating your users will ensure that they can access resources you have licensed specifically for them, such as databases, eBooks or eJournals. WorldCat Local and WorldCat Local “quick start” may authenticate based on IP addresses or by passing users through to your existing authentication log on. Be prepared to share information about your authentication system with OCLC as you prepare for WorldCat Local.

## OpenURL

To provide the best possible WorldCat Local or WorldCat Local “quick start” experience for your users, include links to an OpenURL resolver. The resolver will connect users with resources such as online full-text articles that you provide for them through seamless linking from records in search results.

OCLC staff will work with you to ensure appropriate access to your OpenURL resolver from your WorldCat Local or WorldCat Local “quick start.” In addition, to guarantee ongoing access to your OpenURL resolver from WorldCat.org, enter your resolver’s address in your library’s profile on the WorldCat Registry™ ([www.worldcat.org/registry/institutions](http://www.worldcat.org/registry/institutions)) at any time.

## Placing holds in your OPAC

If your library has an interoperable ILS, OCLC will work with you to enable your users to place holds through WorldCat Local or WorldCat Local “quick start” for items in your library’s collections. You may choose one of two options for doing this:

- **NCIP (NISO Circulation Interchange Protocol).** WorldCat Local supports NCIP for placing holds in circulation systems. To implement this option, your integrated library system (ILS) must support NCIP. If you have already enabled NCIP locally, OCLC will work with you to use your existing system for placing holds. If you have not implemented NCIP in your ILS but wish to do so for WorldCat Local, contact your ILS vendor to discuss whether they offer NCIP as an option. NOTE: NCIP is not available for WorldCat Local “quick start.”
- **Optional configuration.** Use of NCIP is not required for hold placing in WorldCat Local or WorldCat Local “quick start.” Without NCIP, OCLC will work with you to develop hold-placing functionality between WorldCat Local or WorldCat Local “quick start” and your library’s catalog.

## Resource sharing workflow

WorldCat Local includes the option for users to initiate requests to borrow resources from other libraries using WorldCat Resource Sharing™, ILLiad™, VDX® or other OpenURL 1.0-compliant resource sharing services. WorldCat Local “quick start” includes the option for users to initiate requests to borrow resources from other libraries using WorldCat Resource Sharing, ILLiad or VDX.

## User-initiated ILL

If you use WorldCat Resource Sharing you can begin now to customize the form users will complete to request loans of library materials.

Instructions for customizing your library’s ILL request form for WorldCat Resource Sharing are in the FirstSearch Administrative Module Reference Guide on the OCLC Web site at [www.oclc.org/firstsearch](http://www.oclc.org/firstsearch) (click on “documentation” link). If you use other resource sharing services, OCLC will work with you to integrate access to this service in your WorldCat Local implementation.

## More visibility for your digital collections

Give users access to your library’s digital content in addition to other formats when they search WorldCat Local or WorldCat Local “quick start.” Users will appreciate easy access to digital objects, and you will maximize the investments you have already made in digitizing and cataloging these resources. You can provide access to digital collections if metadata for those collections is present in the WorldCat database. Contact your OCLC representative to find out how OCLC can help you add this metadata to WorldCat.

## WorldCat Registry profile

The WorldCat Registry is a central Web location where staff at libraries worldwide manage the data they provide to library service providers through a single, comprehensive Web-accessible profile. Registry profiles support sharing of critical information about libraries and provide global Web visibility for library collections and services.

Information in WorldCat Registry profiles is used to support access from WorldCat Local and WorldCat Local “quick start” to resources such as your library’s Web site, online reference service and OpenURL resolver. Review your profile at [www.worldcat.org/registry/institutions](http://www.worldcat.org/registry/institutions) and update details about your library that will be used for your WorldCat Local or WorldCat Local “quick start” site.

## Subscription

WorldCat Local “quick start” is included in a subscription to the WorldCat database on FirstSearch at no additional charge. An unlimited subscription to WorldCat is required for a WorldCat Local purchase. If you don’t already have a subscription your OCLC representative can help. We also recommend using OCLC’s resource sharing service. Visit [www.oclc.org/resourcesharing](http://www.oclc.org/resourcesharing) for more information.

# WorldCat Local and WorldCat Local “quick start” Planning Checklist

- Review current cataloging practices.
- Add records to WorldCat for materials in your collections that are not already represented in the database.
- Keep your WorldCat holdings up to date.
- Prepare your serials records, including eSerials.
- Index OCLC number in your local catalog.
- Start/update your library’s batchload schedule frequency.
- Confirm access to branch holdings data (for libraries that subscribe to WorldCat Local).
- Confirm permissions for inclusion of vendor records licensed for use in your catalog and initiate a batchload of these records as needed.
- Add digital collections metadata to WorldCat.
- Update your library’s profile in the WorldCat Registry.
- Analyze resource sharing workflow for maximum user access.
- Select a name for your WorldCat Local site or WorldCat local “quick start” site.
- Consider adding an OpenURL resolver if your library does not yet have one.

## For more information

WorldCat Local:  
[www.oclc.org/worldcatlocal](http://www.oclc.org/worldcatlocal)

WorldCat Local “quick start”:  
[www.oclc.org/worldcatlocal/quickstart](http://www.oclc.org/worldcatlocal/quickstart)

Contact your OCLC Library Services representative:  
[libservices@oclc.org](mailto:libservices@oclc.org)



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