



Congratulations on your decision to make WorldCat® Local your library's discovery-to-delivery solution. The following guide will help ensure a smooth transition as you begin to integrate WorldCat Local with your current library systems.

WorldCat holdings

The most important step you can take in preparation for WorldCat Local is to make sure that the majority of your library's collections are represented in the WorldCat® database, along with your local bibliographic data and Local Holdings Records (LHRs). Access to all formats of materials in your library collections—along with valuable local data—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.

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 and add your library's local data (local subject headings, uniform titles, notes, etc.) so they can be searched and displayed in your WorldCat Local.

OCLC provides one retrospective batchload at no charge for all WorldCat Local libraries that have not initiated a retrospective batchload project since July 1, 2005.

Batchloading

WorldCat Local libraries that meet the criteria listed below may use the OCLC® Online Service Center at www.oclc.org/servicecenter/ to submit their batchload requests.

The criteria for submitting automated batchload requests through the OCLC Online Service Center for WorldCat Local 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 implementation, submit your request to publishing@oclc.org.

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 130 million article records from familiar services, such as ArticleFirst®, the British Library, CrossRef, Elsevier, ERIC, GPO Monthly Catalog, JSTOR, MEDLINE and OALster and will continue to add article-level records from additional sources.

OCLC partners with EBSCO, Serials Solutions and TdNet to automate the process of setting and maintaining your holdings for electronic serials in WorldCat. Libraries that subscribe to WorldCat Link Manager™ (until it is decommissioned on 31 Dec 2011) 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.

- **Digital content records**—OCLC’s CONTENTdm® service supports the delivery of access to digital content available in library collections.
- **WorldCat knowledge base**—The WorldCat knowledge base combines data about libraries’ electronic content with linking features that enable access to the content. Once you load this information about your electronic journals and eBooks into the WorldCat knowledge base through a variety of methods including a partnership with provider PubGet, you’ll be able to use the “View Now” links in brief results as well as article-sharing enhancements in WorldCat Resource Sharing and ILLiad. An automated Pubget process will update your e-resource holdings in the knowledge base. You may also turn on nightly synchronization of your knowledge base holdings with WorldCat to insure up-to-date holdings without a significant investment of staff time. To initiate your use of the WorldCat knowledge base, complete the request form at www.oclc.org/forms/wckb-request.en.html.

Vendor records

WorldCat Local vendor records are records that a WorldCat Local 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 libraries to obtain agreements for the addition of vendor records already licensed by libraries to WorldCat. You can initiate a batchload request to have your library’s holdings symbol added to these 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.

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 you use Voyager, you may also consider matching on your Local System Number (LSN).

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.

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. Adding your information to the WorldCat knowledge base will also help you display and maintain accurate serials ownership information.

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.

Consider local cataloging practices

Current cataloging practices within your library or group will impact the success of users searching for items within WorldCat Local. 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.

Branding your library

WorldCat Local supports 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 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 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 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

Inbound and outbound OpenURL resolution based on data in the WorldCat knowledge base is included in a WorldCat Local subscription and an A to Z journal list will be available soon. To take advantage of this built-in functionality, complete the WorldCat knowledge base request form at www.oclc.org/forms/wckb-request.en.html and load your local data to the knowledge base.

Consider subscribing to the OCLC License Manager service. License Manager is a new service that combines full OpenURL resolution with a comprehensive license management solution in a single Web-accessible place. For more information about License Manager, see www.oclc.org/us/en/license-manager/default.htm.

Alternatively, OCLC staff can also work with you to ensure appropriate access to your existing OpenURL resolver from your WorldCat Local. 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™ via OCLC Service Configuration.

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 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.org.
- **Optional configuration.** Use of NCIP is not required for hold placing in WorldCat Local. Without NCIP, OCLC will work with you to develop hold-placing functionality between WorldCat Local 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.

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 (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, through the WorldCat Digital Collection Gateway. The Gateway is a self-service tool for uploading the metadata of your unique digital content to WorldCat, at no additional charge. Users will appreciate easy access to digital objects, and you will maximize the investments you have already made in digitizing and cataloging these resources.

WorldCat Registry

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

Information in the WorldCat Registry is used to support access from WorldCat Local to resources such as your library's Web site, online reference service and OpenURL resolver. Review your library's information at www.worldcat.org/registry/institutions and update details about your library that will be used for your WorldCat Local through OCLC Service Configuration.

Subscription

An unlimited subscription to the WorldCat database on FirstSearch 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 for more information.

WorldCat Local Planning Checklist

- Review current cataloging practices.
- Add records to WorldCat for materials in your collections that are not already represented.
- 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.
- 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 through the Digital Collections Gateway.
- Update your library's information in the WorldCat Registry.
- Analyze resource sharing workflow for maximum user access.
- Select a name for your WorldCat Local site
- Decide whether to use the built-in OpenURL resolver or if you will add your own.
- Add information about your electronic collections into the WorldCat knowledge base through PubGet.
- Load your local bibliographic data and Local Holdings Records (LHRs) so they can be searched and displayed.

For more information

WorldCat Local:
www.oclc.org/worldcatlocal

Contact your OCLC Library Services representative:
libservices@oclc.org



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