

Submit your data file

Prepare your data file

- Download a shared print file template.
Caution: The order and format of the columns in the template should not be changed. If you do not need to use a column, do not remove it from the CSV file. Instead, leave the data rows empty.
 - [Abbreviated format shared print file template](#) - Use this template for submitting monograph data that matches all of the default values in your profile. It contains 3 required columns (OCLC Number, LSN, and Barcode).
 - [Full format shared print file template](#) - Use this template for submitting monograph, multi-part monographs, or serials data that differs from the default values in your profile. This file template should also be used for group/agent processors.

It contains 14 columns, four of which are required (OCLC_Number, LSN, Barcode, and ActionNote_583\$a). The remaining columns can be used to override default values defined in your profile.

- You can use Excel or another spreadsheet editor while preparing your data file, but it must be saved as a CSV file (**File > Save As > Save as type > CSV (Comma delimited)**). You cannot submit a .CSV file encoded as UTF-8.
- **Use Excel to de-dupe, so all OCLC Numbers included in the data file are unique.**

Shared print data file columns

Shared print data file columns

Column name	Column description	Required	Example
OCLC_Number	The OCLC number of the record supplied.	x	987654321
LSN	Local System Number: A unique ID provided for user identification of reporting errors. (Colby Note: This is the bib record number, leave off	x	123456

Column name	Column description	Required	Example
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“b” in Sierra bib record number--i.e. b10580281 is changed to 10580281)

Barcode	WMS-library-supplied barcode used for matching and merging existing LHR information. Colby Note: Colby is not a WMS library. Leave Barcode column in spreadsheet, but data will be blank.	x (WMS libraries only)	123456
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Example of the Abbreviated template formatting for Colby:

	A	B	C	D	E	F
1	OCLC_Number	LSN	Barcode			
2	982448377	51525367				
3	4767267	10580281				
4	114885	11212342				
5						

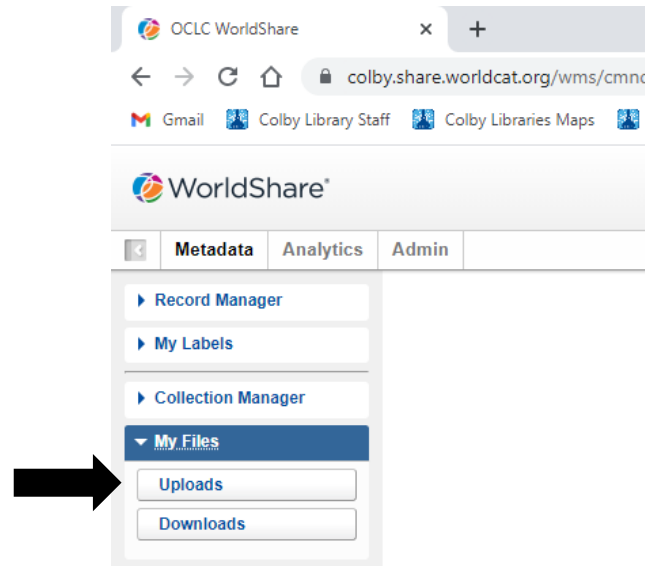
If you had a GreenGlass analysis performed by Sustainable Collection Services (SCS), the following columns from your allocation export file can be used to populate the first three columns of your datafile. The column headers must be renamed as follows:

Allocation Export File column	Rename to...
WorldCat OCLC Number	OCLC_Number
Bib Record Number	LSN
Barcode	Barcode

Upload your data file

Note: You must save your data file as a standard Comma Separated Values (.csv) file, not as an Excel spreadsheet (.xls) or a .CSV UTF-8 encoded file.

1. In the WorldShare interface, navigate to **Metadata > My Files > Uploads**.



- Click **Choose File** to locate the file you wish to upload. See [File naming conventions](#) (see pages 6-7) for more information. (Colby Note: File naming conventions are 1036750.cby.sharedprint_**20210802** (bolded text in file name example is in yyymmdd format))

The screenshot shows the 'Admin' section with a sidebar containing 'Record Manager', 'My Labels', 'Collection Manager', and 'My Files'. The 'My Files' section has 'Uploads' and 'Downloads' buttons. The main area is titled 'Uploads' and contains an 'Upload File' section with a 'Choose File' button (highlighted in yellow) and a 'No file chosen' message. Below this is a 'File Type' section with two radio buttons: 'Data sync bibliographic' and 'Data sync LHR'. An 'Upload' button is also present. At the bottom, there is a table with columns 'File Name', 'File Type', 'Size', and 'Upload Date'. The table currently displays 'No results' and has a 'Rows' dropdown set to '10'.

- Select your file and click **Open**. The file name replaces "No file chosen" in the Upload File field.
- Select **Data sync LHR** for File Type.

This close-up screenshot shows the 'Admin' section with the 'Uploads' form. The 'Choose File' button now contains the file name '1036750.cb...0210802.csv'. The 'File Type' section shows 'Data sync LHR' selected with a radio button, which is highlighted in yellow. The 'Upload' button is still visible below.

5. Click **Upload**. A confirmation message appears when the file has successfully uploaded. If a file was unable to upload, an error message will appear.

The screenshot shows the OCLC WorldShare interface for file uploads. The browser address bar displays the URL: `colby.share.worldcat.org/wms/cmnd/metadata/files/upload`. The interface includes a navigation menu with the following items: Record Manager, My Labels, Collection Manager, and My Files. Under the My Files section, there are buttons for Uploads and Downloads. The main content area is titled 'Uploads' and contains an 'Upload File' section with a 'Choose File' button and a 'No file chosen' message. Below this, there are radio buttons for 'Data sync bibliographic' and 'Data sync LHR'. An 'Upload' button is located below the radio buttons. A table below the upload section shows the results of the upload:

File Name	File Type	Size	Upload Date
1036750.cby.sharedprint_20210802.csv	Data sync LHR	1 KB	08/02/2021

File naming conventions

Each file name must be unique and must adhere to the following naming convention:

<collectionID>.<OCLCsymbol>.sharedprint_<optionaltext>_<YYYYMMDD>.<optionalfile#>.csv

The "collectionID" is generated after you click Save Progress in Collection Manager for the first time. You can find the unique 7-digit Collection ID in the [Properties accordion](#). Record this number as you will need it to rename your data file to the required naming convention. This will ensure that the data file you submit will match the collection information you created in Collection Manager.

If you need to upload more than one data file on the same day for the same profile (Collection ID), the file names must be made unique. One option is to utilize the <optionaltext> of the required naming convention.

Example

- 1028071.ndclv.sharedprint_**first**_20170731.csv

- 1028071.ndclv.sharedprint_**second**_20170731.csv

Another option is to differentiate files with file numbers in the <optionalfile#> portion of the required naming convention.

Example

- 1028071.ndclv.sharedprint_first_20170731.**1**.csv
- 1028071.ndclv.sharedprint_first_20170731.**2**.csv

Local holdings record creation and merging

Once the file is submitted, retention statements for each record will be included in a local holdings record (LHR) which will be created or added to depending on if an LHR already exists for that record. The internal process is described below:

- If no LHR exists, one is added.
- If one LHR exists, the shared print (583) information is merged into it.
- If more than one LHR exists but none are designated as shared print, a new shared print LHR is added.
- If more than one LHR exists and one LHR already is designated as shared print, a new shared print LHR is added.

If you intend to update existing shared print LHRs, OCLC recommends using submission via [MARC format](#).

Next steps

An OCLC database specialist will review your shared print collection profile and data file once both have been submitted. If they have any questions, they will contact you. Once your profile has been approved and any questions have been answered, the database specialist will change your collection's status from "In Progress" to "Accepted".

You will know that your data file has been processed when you see a summary report (and possibly other reports) in My Files/Downloads. Reports are typically delivered in 2-3 working days.

Download your reports

1. In the WorldShare interface, navigate to **Metadata > My Files > Downloads**. *Filter by Reports in the drop-down menu.*

The screenshot shows the WorldShare interface with the navigation menu on the left. The 'My Files' section is expanded, and the 'Downloads' button is selected. The main content area shows the 'Downloads' page with the 'Records and Reports' tab active. The 'Filter by' dropdown is set to 'Reports'. The 'Downloaded' checkbox is checked, and the text 'Hide downloaded files' is visible. Below the filter options, there is a message 'No results' with a refresh icon. A table header is visible with columns: File Name, File Type, Size, Post Date, Download Date, and Action. The table body contains the text 'No data to display'.

No reports to display after uploading your data file.

Check back in a few days:

The screenshot shows the WorldShare interface with the navigation menu on the left. The 'My Files' section is expanded, and the 'Downloads' button is selected. The main content area shows the 'Downloads' page with the 'Records and Reports' tab active. The 'Filter by' dropdown is set to 'Reports'. The 'Downloaded' checkbox is checked, and the text 'Hide downloaded files' is visible. Below the filter options, there is a message 'Results 1 - 2 of 2' with a refresh icon. A table header is visible with columns: File Name, File Type, Size, Post Date, Download Date, and Action. The table body contains two rows of data:

File Name	File Type	Size	Post Date	Download Date	Action
metacoll.CBY.datasync.1036750.D20210802.T192536000.spsummary.1.mrc.csv	Reports	1 KB	08/02/2021		Download
metacoll.CBY.datasync.1036750-1036750.D20210802.T192536454.lhrxrefrpt.txt	Reports	1 KB	08/02/2021		Download

2. Locate the report you want to download.
 - o Reports will include a .csv or .txt extension.

3. In the Action column, click **Download**. The report will automatically download to your computer.

Available reports

Summary report

Format of file name:

metacoll.[symbol].**datasync**.[collectionID].[DYYYYMMDD].[THHMMSSSS].**spsummary**.[file#].mrc.csv

Example file name: metacoll.ESPPP.datasync.1034620_1584290348241.D20200316.T123403000.spsummary.1.mrc.csv

Exception Detail report

Format of file name:

metacoll.[symbol].**datasync**.[collectionID].[DYYYYMMDD].[THHMMSSSS].**spexception**.[file#].mrc.csv

Example file name: metacoll.ESPPP.datasync.1034620_1584290348241.D20200316.T123403000.spexception.1.mrc.csv

The Exception Detail report displays record identifiers of Local Holdings records that OCLC was unable to process. The Data Sync Exception Description column describes any errors found within the records which were added to WorldCat as a result of processing (e.g., "Failed due to processing error, please resubmit record", "No matching barcode in WorldCat"). Exceptions may occur due to:

- System processing errors
- Missing OCLC numbers in the original data file
- Barcodes not found in WorldCat (WMS libraries only)
- Missing information in required template columns

If your initial Shared Print upload file contains errors, you will need to correct any errors in your data file (e.g., add or correct OCLC numbers and/or barcodes, remove Multi-Part Monograph and/or Serial data). You can email support@oclc.org for assistance with this.

(Optional) Download your MARC records

If your collection profile included outputting MARC records, they will appear in My Files > Downloads.

1. In the WorldShare interface, navigate to **Metadata > My Files > Downloads**.

2. Locate the file you want to download.
 - Files will include a .mrc extension (e.g., **metacoll**.[symbol].**datasync.sharedprintlhr**.[collectionID].[DYYYYMMDD].[THHMMSSSS].[file#].mrc).
3. In the Action column, click **Download**. The report will automatically download to your workstation

View your retention commitments in WorldCat

See [View Shared Print retention commitments](#) to learn how to view your Shared Print retention commitments in Connexion, FirstSearch, WorldCat Discovery, WorldShare Collection Manager, WorldShare Record Manager, and via the WorldCat Metadata API.