

STEPS FOR PROCESSING THIRD PARTY KNOWLEDGE BASE FILES

The following steps will walk you through downloading holdings files from EBSCOadmin and uploading them to OCLC WorldShare Collection Manager.

These steps are adapted from the following OCLC help documentation:

[Map titles from an alternate knowledge base supplier \(OCLC Support\)](#)

Download Holdings from EBSCOadmin Holdings Management

1. Login to EBSCOadmin.
2. Click on “Download Your Holdings” (under Quick Actions).

The screenshot displays the EBSCOadmin interface for Holdings Management. The top navigation bar includes 'Customize Services', 'Authentication', 'Holdings Management', 'Local Collections', 'Reports & Statistics', and 'Database Title Lists'. The 'Holdings Management' section is active, showing 'Overview', 'Titles', 'Packages', and 'Vendors' tabs. A search bar is present with the text 'Enter a search term' and a 'Search' button. Below the search bar are three donut charts: 'Unique Titles' (510955 Managed vs Custom), 'Holdings' (717427 Managed vs Custom), and 'Packages' (449 Managed vs Custom). The 'Quick Actions' section at the bottom contains several links, with 'Download Your Holdings' highlighted by a red box.

Category	Managed	Custom	Percentage
Unique Titles	510953	2	99% / <1%
Holdings	717425	2	99% / <1%
Packages	436	13	97% / 2%

3. Select options as needed to filter the output.

Download Holdings | Download Cost Records | Download Holdings Integration Changes | View All Downloads

Type ?

Standard KBART KBART With Usage

Format ?

CSV Tab Delimited

Contents ?

Resources

Managed and Custom Managed Custom

Package Content Types

<input checked="" type="checkbox"/> All	<input type="checkbox"/> E-Book	<input type="checkbox"/> Online Reference	<input type="checkbox"/> Streaming Media
<input type="checkbox"/> Abstract and Index	<input type="checkbox"/> E-Journal	<input type="checkbox"/> Print	<input type="checkbox"/> Unknown
<input type="checkbox"/> Aggregated Full Text	<input type="checkbox"/> Mixed Content		

Package name

Search by Package Name

Resource Types

<input type="checkbox"/> All	<input type="checkbox"/> Database	<input checked="" type="checkbox"/> Proceedings	<input type="checkbox"/> Thesis/Dissertation
<input type="checkbox"/> Audio Book	<input checked="" type="checkbox"/> Journal	<input checked="" type="checkbox"/> Report	<input checked="" type="checkbox"/> Unspecified
<input type="checkbox"/> Book	<input checked="" type="checkbox"/> Newsletter	<input type="checkbox"/> Streaming Audio	<input type="checkbox"/> Web Site
<input checked="" type="checkbox"/> Book Series	<input checked="" type="checkbox"/> Newspaper	<input checked="" type="checkbox"/> Streaming Video	

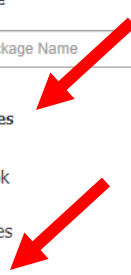
Visibility

All Selected Holdings

Holdings Visible In

- Publication Finder
- Full Text Finder Resolver
- MARC Export

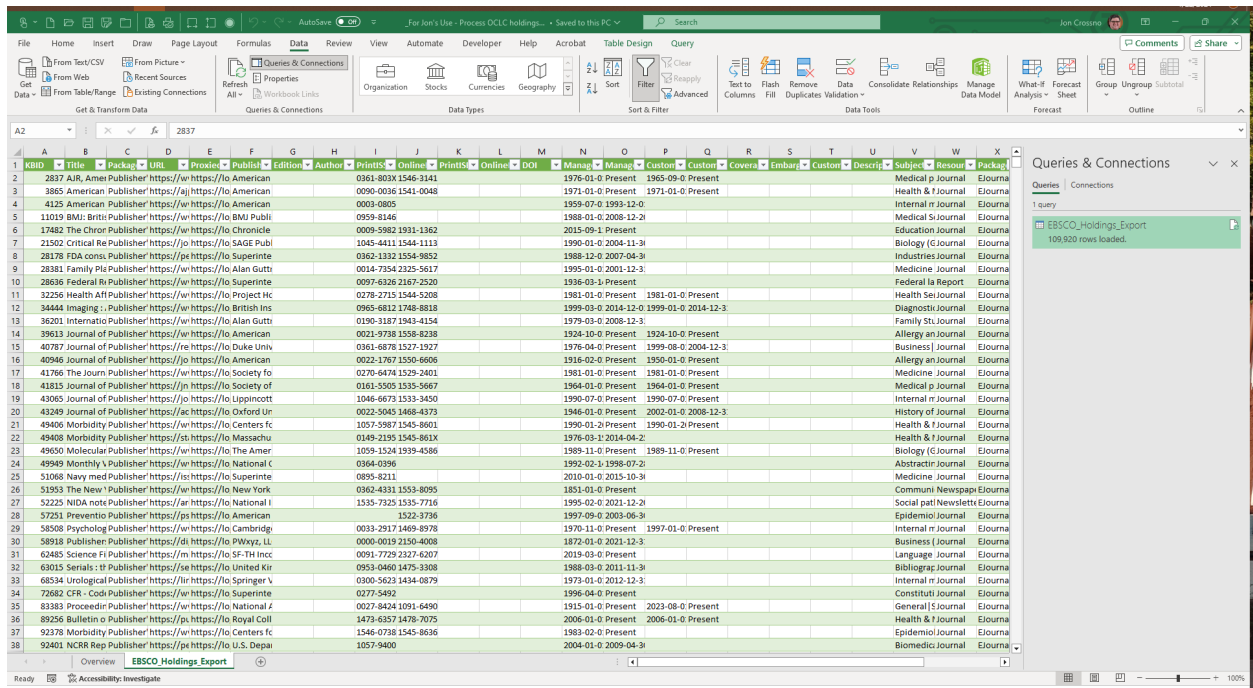
Holdings Hidden In



4. Enter a filename and click the “Create File for Download” button.

5. Save the file in a specific location.

Edit File Using Microsoft Excel (Power Query)



1. Open saved Excel file with pre-loaded query.
2. Select "Queries & Connections" on the Data tab.
3. Mouse over the query and select the Edit option.
4. Make sure that the Source reflects the recently downloaded file.
5. The default query that I have used is as follows:

let

```
Source = Csv.Document(File.Contents("<<filepath>>"), [Delimiter=",", Columns=43, Encoding=65001, QuoteStyle=QuoteStyle.None]),
#"Promoted Headers" = Table.PromoteHeaders(Source, [PromoteAllScalars=true]),
#"Changed Type" = Table.TransformColumnTypes(#"Promoted Headers",{{"KBID", Int64.Type}, {"Title", type text}, {"AlternateTitle", type text}, {"PackageName", type text}, {"URL", type text}, {"ProxiedURL", type text}, {"Publisher", type text}, {"Edition", type text}, {"Author", type text}, {"Editor", type text}, {"Illustrator", type text}, {"PrintISSN", type text}, {"OnlineISSN", type text}, {"PrintISBN", type text}, {"OnlineISBN", type text}, {"DOI", type text}, {"PeerReviewed", type text}, {"ManagedCoverageBegin", type text}, {"ManagedCoverageEnd", type text}, {"CustomCoverageBegin", type text}, {"CustomCoverageEnd", type text}, {"CoverageStatement", type text}, {"Embargo", type text}, {"CustomEmbargo", type text}, {"Description", type text}, {"Subject", type text}, {"ResourceType", type text}, {"PackageContentType", type text}, {"CreateCustom", type text}, {"HideOnPublicationFinder", type
```

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text}, {"Delete", type text}, {"OrderedThroughEBSCO", type text},
{"IsCustom", type text}, {"UserDefinedField1", type text},
{"UserDefinedField2", type text}, {"UserDefinedField3", type
text}, {"UserDefinedField4", type text}, {"UserDefinedField5",
type text}, {"PackageType", type text},
{"AllowEBSCOtoSelectNewTitles", type text})),
#"Removed Columns" = Table.RemoveColumns("#"Changed
Type",{"AlternateTitle", "Editor", "Illustrator", "PeerReviewed",
"OrderedThroughEBSCO", "IsCustom", "UserDefinedField1",
"UserDefinedField2", "UserDefinedField3", "UserDefinedField4",
"UserDefinedField5", "PackageType",
"AllowEBSCOtoSelectNewTitles"}),
#"Filtered Rows" = Table.SelectRows("#"Removed Columns", each
([HideOnPublicationFinder] = "N") and ([ResourceType] <> "Book"
and [ResourceType] <> "Database" and [ResourceType] <>
"Thesis/Dissertation" and [ResourceType] <> "Web site"))
in
#"Filtered Rows"

```

6. Copy the active Excel sheet to a new file.
7. Save the new file as Unicode_Text (.txt) with the filename "[Supplier]_HOLDINGS_[registry_id].txt" (per the OCLC help documentation).

The screenshot displays the Power Query Editor interface for a query named "EBSCO_Holdings_Exp...". The main area shows a table with the following columns: KBID, Title, and PackageName. The data rows are numbered 1 through 29, and each row contains a KBID, a journal title, and the publisher "Publisher's Site".

KBID	Title	PackageName
1	2837 AJR, American Journal of Roentgenology	Publisher's Site
2	3865 American Journal of Public Health	Publisher's Site
3	4125 American Review of Respiratory Disease	Publisher's Site
4	11019 BMJ: British Medical Journal (International edition)	Publisher's Site
5	17482 The Chronicle of Higher Education	Publisher's Site
6	21502 Critical Reviews in Oral Biology & Medicine	Publisher's Site
7	28178 FDA consumer	Publisher's Site
8	28381 Family Planning Perspectives	Publisher's Site
9	28636 Federal Register (USA)	Publisher's Site
10	32256 Health Affairs	Publisher's Site
11	34444 Imaging : An International Journal of Clinico-Radiological Practice	Publisher's Site
12	36201 International Family Planning Perspectives	Publisher's Site
13	39613 Journal of Clinical Investigation	Publisher's Site
14	40787 Journal of Health Politics, Policy and Law	Publisher's Site
15	40946 Journal of Immunology, The	Publisher's Site
16	41766 The Journal of Neuroscience : The Official Journal of the Society for Ne...	Publisher's Site
17	41815 Journal of Nuclear Medicine: JNM	Publisher's Site
18	43065 Journal of the American Society of Nephrology : JASN	Publisher's Site
19	43249 Journal of the History of Medicine and Allied Sciences	Publisher's Site
20	49406 Morbidity and Mortality Weekly Report: Recommendations and Reports	Publisher's Site
21	49408 Morbidity and Mortality Weekly Report: MMWR Weekly Past Volumes...	Publisher's Site
22	49650 Molecular biology of the cell	Publisher's Site
23	49949 Monthly Vital Statistics Report	Publisher's Site
24	51068 Navy medicine	Publisher's Site
25	51953 The New York Times	Publisher's Site
26	52225 NIDA notes	Publisher's Site
27	57251 Prevention & Treatment	Publisher's Site
28	58508 Psychological Medicine	Publisher's Site
29		

The interface includes a ribbon with tabs for File, Home, Transform, Add Column, and View. The Query Settings pane on the right shows the query name and applied steps: Source, Promoted Headers, Changed Type, Removed Columns, and Filtered Rows.

Submit File to OCLC

1. Instructions are available at https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Knowledge_base_collections/Choose_a_method_to_add_or_create_a_knowledge_base_collection/Map_titles_from_a_holdings_file
2. I prefer to use Filezilla (an FTP client) to upload files.
3. Open Filezilla.
4. Initiate the FTP connection to the OCLC FTP server.
5. Navigate on the Local site to where you have saved the output file from Excel.
6. Navigate on the Remote site to “/xfer/wckb/in/data”.
7. Double-click on the local file to begin the upload process.
8. When the process is complete, send an email to support@oclc.org with the information that the file has been uploaded and is ready for processing. Be sure to include:
 - Your institution name
 - Your registry ID
 - Your file name

Questions?

Contact Jon Crossno at jon.crossno@utsouthwestern.edu.