# STEPS FOR PROCESSING THIRD PARTY KNOWLEDGE BASE FILES

UT Southwestern Medical Center
Health Sciences Digital Library & Learning Center

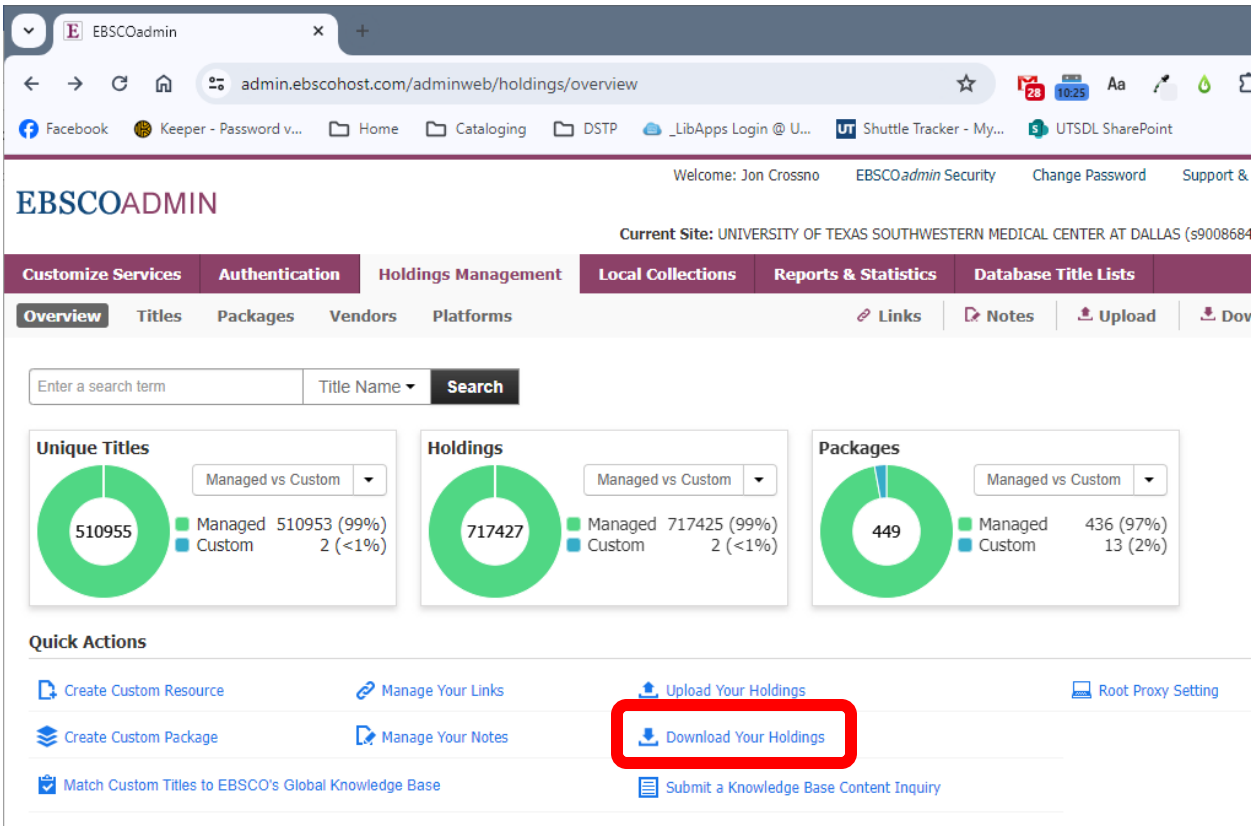
The following steps will walk you through downloading holdings files from EBSCO*admin* and uploading them to OCLC WorldShare Collection Manager.

These steps are adapted from the following OCLC help documentation:

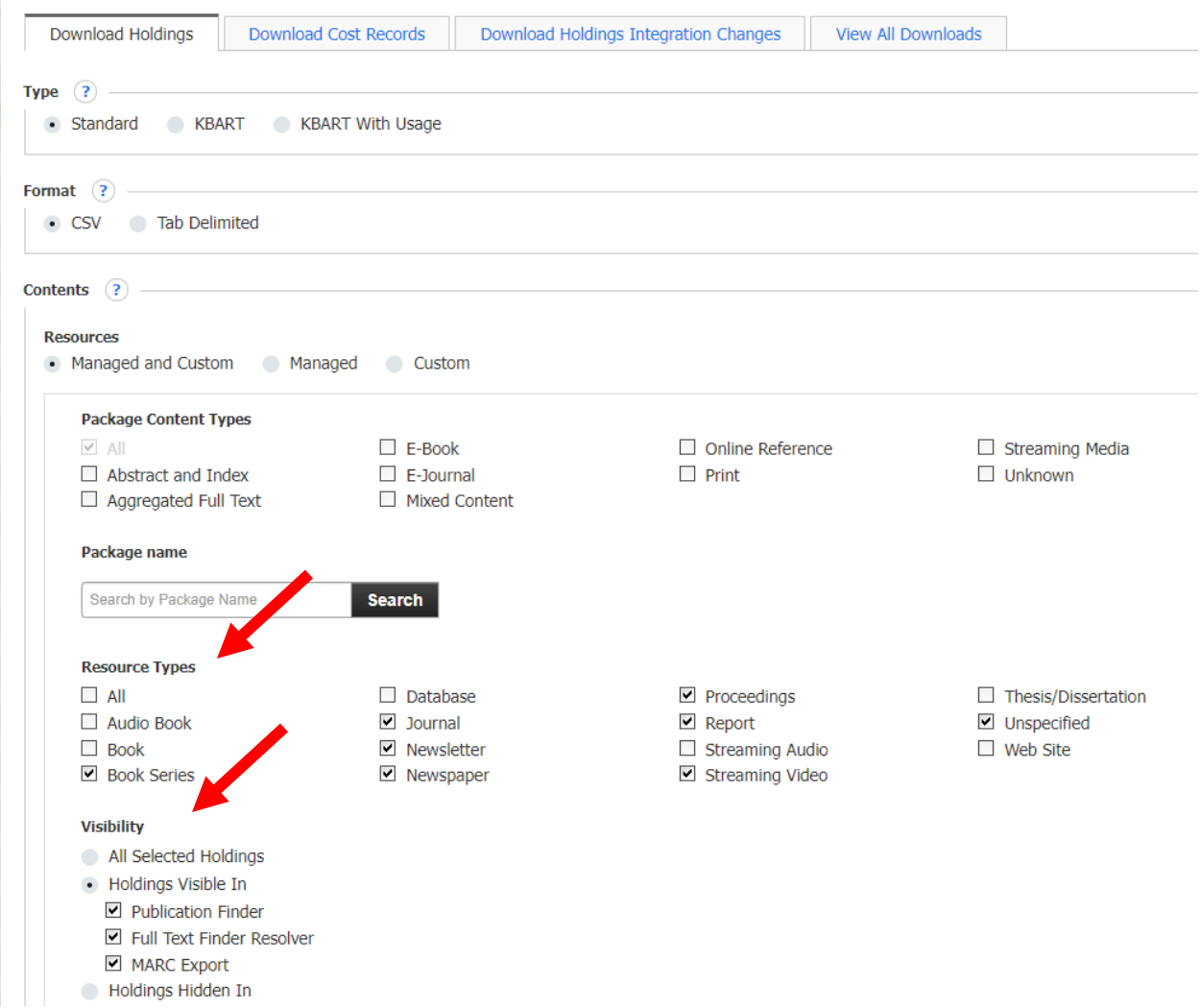
> Map titles from an alternate knowledge base supplier (OCLC Support)

## Download Holdings from EBSCO*admin* Holdings Management

1. Login to EBSCO*admin*.
2. Click on "Download Your Holdings" (under Quick Actions).

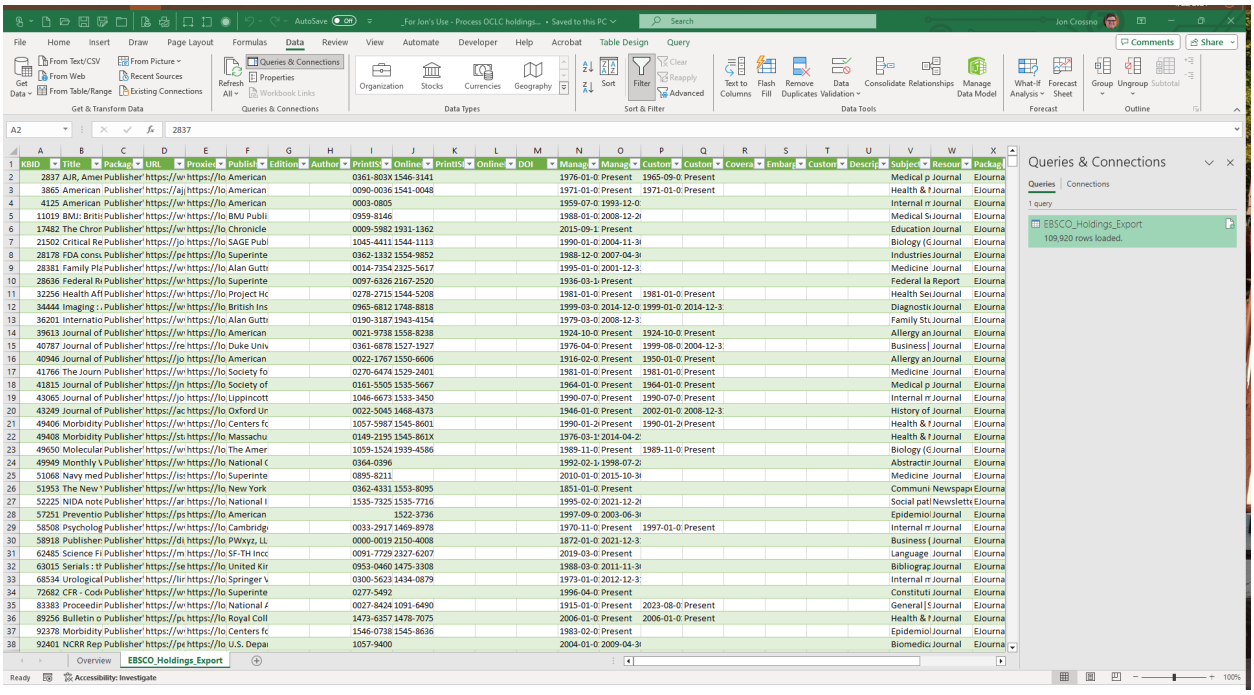


3. Select options as needed to filter the output.




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)

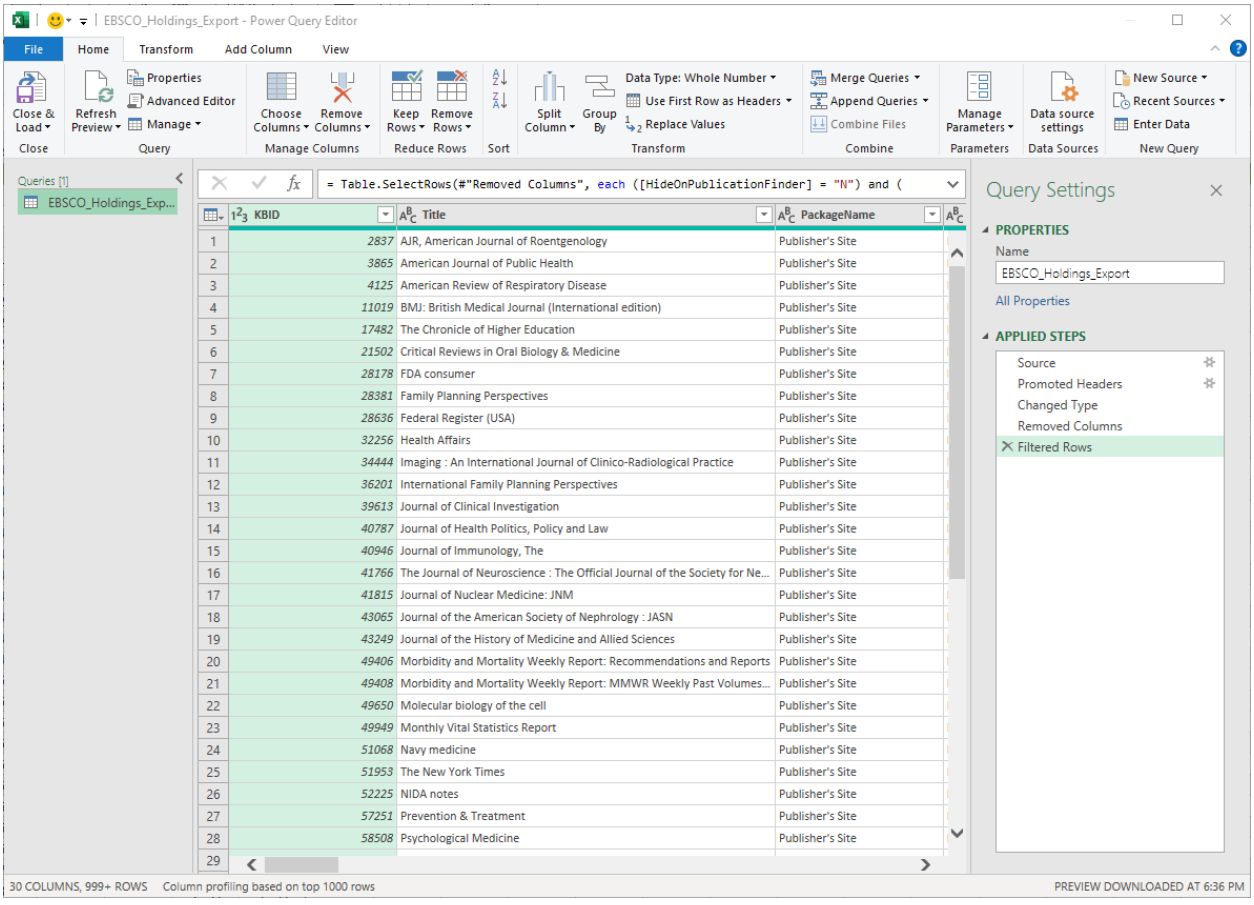



1. Open saved Excel file with pre-loaded query.
2. Select “Queries & Connections” on the Data tab.
3. Mouse over the query and select the Edit option.
4. Make sure that the Source reflects the recently downloaded file.
5. The default query that I have used is as follows:

```
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
```

```
        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).



## 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.