

## OCLC WorldShare Collection Manager quick start guide

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*Note: The screenshots herein are given for illustration only. Screen displays may vary depending upon the current site design and the WorldShare services to which your library subscribes.*

### Initial sign-in / Change password

- 1) If you have not already been provisioned for Collection Manager, please complete the online form at <https://www.oclc.org/forms/col-man-marc.en.html>.

Please provide your OCLC symbol and/or Registry ID, if known; however, you may still submit form without either of these.

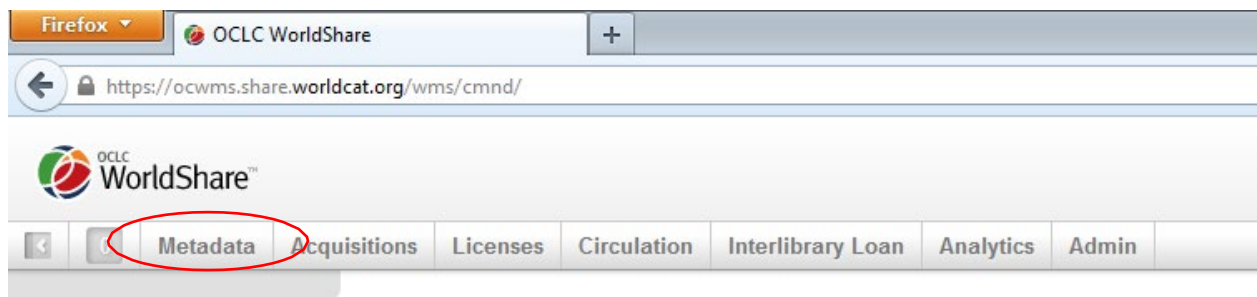
- 2) After completing the online form to be provisioned, you will receive an email from OCLC Order Services giving you a library-specific URL for accessing WorldShare.

Once you receive that email, please follow the accompanying instructions for setting you username and/or password (the specific steps are dependent upon your OCLC cataloging subscription level).

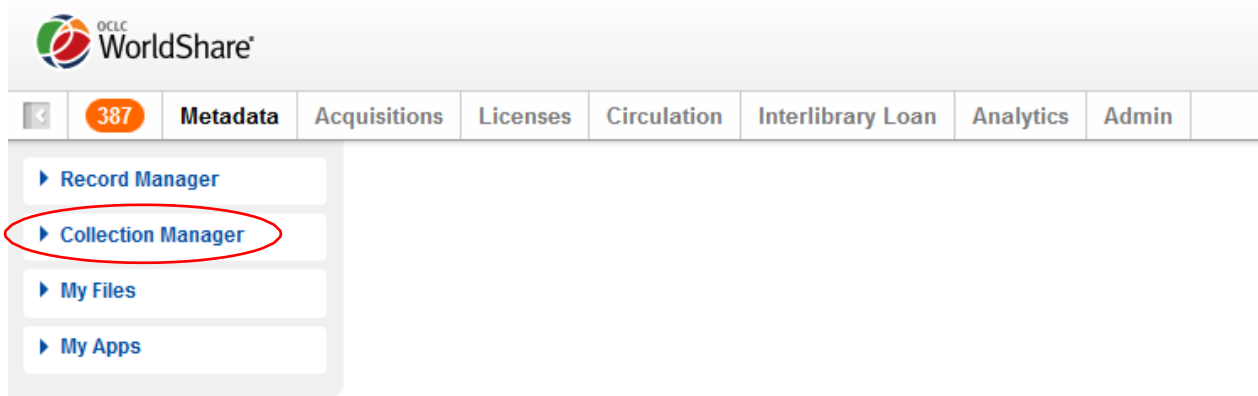
- 3) Once your password has been set, log into WorldShare.

### Verify preferred OCLC symbol and proxy credentials

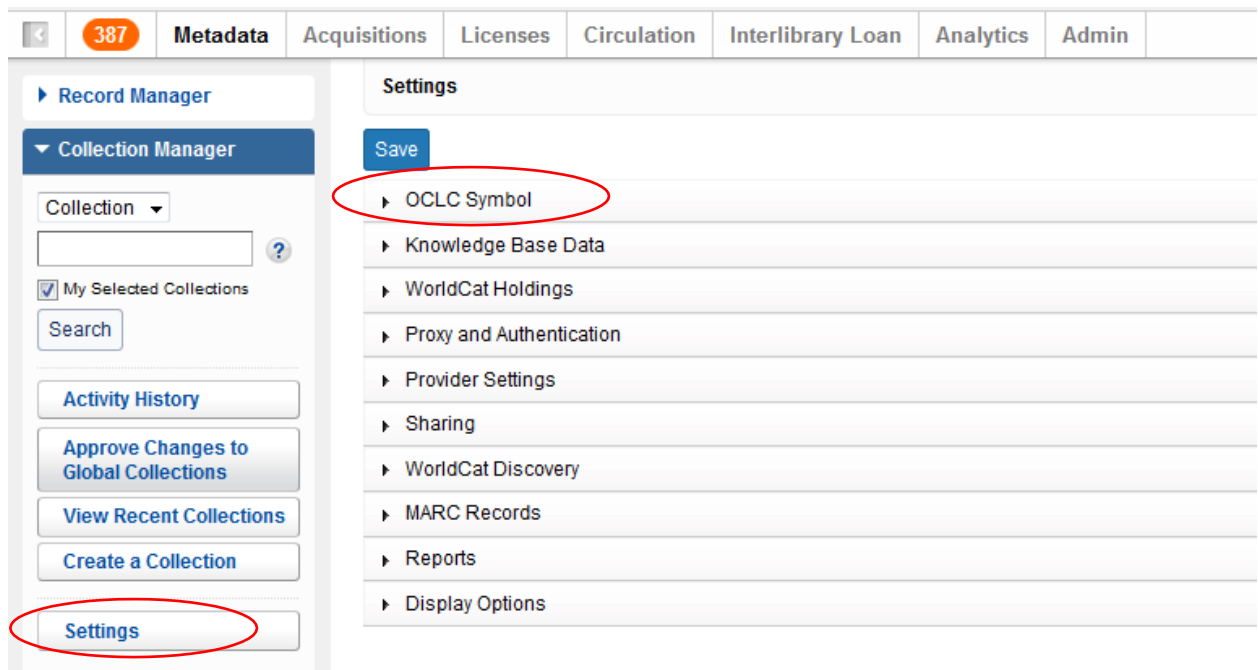
- 4) Click on the "Metadata" tab.



- 5) Click “Collection Manager” in the navigation pane that opens on the left.



- 6) Click “Settings”, then click “OCLC Symbol” in the pane that opens on the right.



- 7) After clicking “OCLC Symbol” in the step above, verify that the radio button for your preferred OCLC symbol is selected. Once the correct symbol is selected, click “Save” in the upper-left corner of that pane.

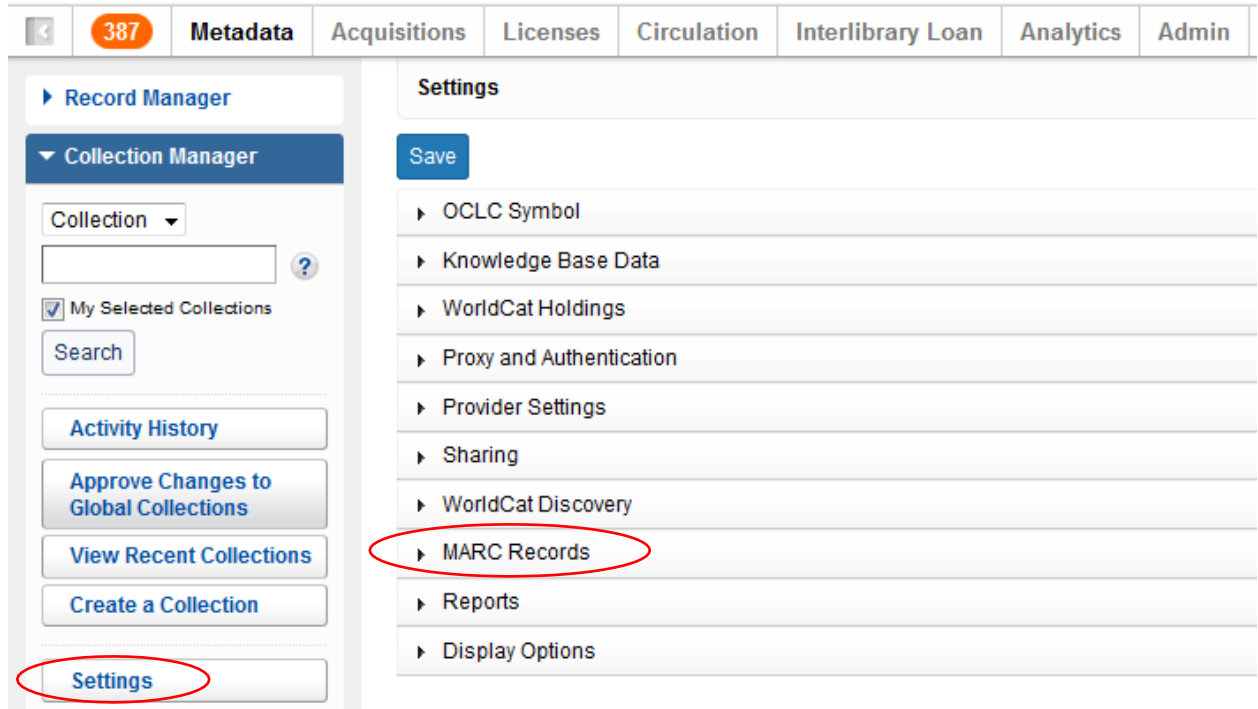
This screenshot shows the 'Settings' page in the OCLC interface. The left sidebar contains a 'Collection Manager' section with a 'Collection' dropdown, a search box, and buttons for 'Activity History', 'Approve Changes to Global Collections', 'View Recent Collections', 'Create a Collection', and 'Settings'. The main content area is titled 'Settings' and features a 'Save' button at the top. Below it, the 'pCLC Symbol' section is expanded, showing a description: 'Your OCLC symbol will be used to maintain WorldCat holdings and output MARC records.' A 'Refresh from WorldCat Registry' button is present. The 'OCLC Symbol' section has two radio buttons: 'OCWMS' (selected) and 'None'. Below this, a list of expandable sections includes 'Knowledge Base Data', 'WorldCat Holdings', 'Proxy and Authentication', and 'Provider Settings'.

You can also save your institution's proxy information, which will be prepended to the hyperlinks in your MARC records' 856 fields. To do this, expand the drop-down arrow next to "Proxy and Authentication" and enter your prefix on the "Proxy" tab. (If you use a service other than EZ Proxy, you will need to click the radio button for "III WAM Proxy.") Please remember to click the "Save" button before leaving this screen.

This screenshot shows the 'Settings' page with the 'Proxy and Authentication' section expanded. The 'Save' button in the top left is circled. The 'Proxy and Authentication' section has a sub-tab 'Proxy' selected. Below the sub-tabs, a description states: 'Your proxy-based URL will be prepended to any http catalog links to direct off-campus users through your proxy server. This setting can be overridden in an individual collection's settings.' The 'Proxy Type' section has three radio buttons: 'None', 'EZ Proxy' (selected), and 'III WAM Proxy'. The 'Base URL' field contains 'http://proxy.oclc.org/loc'. The 'Username' and 'Password' fields are empty. The 'Settings' button in the left sidebar is also circled.

## MARC editing options

- 8) Now that you have some initial profile parameters, you may wish to enable MARC record delivery.
- 9) In the left-hand navigation pane, click “Settings” and then “MARC Records”.



- 10) Click the radio button for “Yes” and MARC record editing options will appear. The options given under the three tabs here will be applied globally to all of your collections. (You will have the option of defining set-specific preferences later.)

Please note: You MUST click the “Save” button in the upper left corner of the pane before moving to a different tab (or menu option under “Settings”) in order to save the preferences you have specified.

The screenshot shows the 'MARC Records' section of the Collection Manager interface. The 'Enable MARC Records Delivery' option is set to 'Yes' and is circled in red. The 'Customize Records' tab is active, showing options for all collections. The 'Holding Library Code (049 \$a)' is set to 'MAIN'. The 'Delete Fields' section shows a table with columns 'Tag', 'Ind 1', and 'Ind 2'. The 'Delete Subfields' section shows a table with columns 'Tag', 'Ind 1', 'Ind 2', and 'Subfield'. The 'Add Fields' section shows a table with columns 'Tag', 'Ind 1', 'Ind 2', 'Subfield', 'Value', and 'Tag'.

- 11) The “Customize Records” tab details the editing options available to you, which chiefly comprise constant data at the field and subfield levels, as well as defining which fields/subfields to delete.

Please note that a four-character holding library code is required. You may accept the default of “MAIN” or enter a different value.

Please also note that Collection Manager will edit a 590 field into each record specifying the collection name by default.

(For more details on Collection Manager’s customization options, including collection-specific notes, please see <http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/customize-marc-records.en.html>.)

Please click the “Save” button in the upper left of the pane before moving on.

## WorldCat updates

- 12) The “WorldCat Updates” tab allows you to define for all collections when you would like to receive updated records as the WorldCat records in WorldCat change. When this option set to the default of “None”, you will still receive essential update records, such as those that reflect a knowledge base URL change, a change to proxy server settings, or a change to a title’s associated OCLC Control Number. And, if your library participates in demand-driven acquisitions, then you will still receive update records as records “move” from the “DDA” collection to the “Purchased” collection.

However, by choosing either of the “Based on changes to WorldCat records...” options, you may profile which MARC tag and/or encoding level changes will trigger the delivery of an update record. Selecting the radio button for “Select options for specific changes to the WorldCat

record” will reveal sections to “Specify Including Conditions” and “Specify Excluding Conditions”.

(For more details on Collection Manager’s customization options, please see <http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/worldcat-updates.en.html>.)

Please click the “Save” button in the upper left of the pane before moving on.

## Record delivery preferences

The “Record Delivery” tab allows you to define your output file format (e.g. MARC 21, UNIMARC, MARCXML, etc.) and character set (MARC-8 or UNICODE), as well as the file delivery frequency.

(For more details on Collection Manager’s record delivery options, please see <http://oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/record-delivery.en.html>.)

Please click the “Save” button in the upper left of the pane before moving on.

## Reports

13) Collection Manager offers the option to receive reports for MARC record deliveries and/or WorldCat holdings (the latter only if your library has an OCLC cataloging or CatExpress subscription).

Use the “Reports” menu option under “Settings” to opt in for these notifications. You will need a valid 9-digit OCLC authorization (such as a Connexion authorization). If you do not have an authorization number, you may contact OCLC Order Services at [orders@oclc.org](mailto:orders@oclc.org) to obtain one.

(For more details on Collection Manager’s reporting options, please see <http://www.oclc.org/support/services/collection-manager/documentation/settings-glossary/reports.en.html>.)

Please click the “Save” button in the upper left of the pane before moving on.

## Search for collections

- 14) Collection Manager offers the ability to search for all available collections, or just those your library already holds (including those previously selected).

In the left-hand navigation pane, you can check or uncheck the box for “My Selected Collections” to limit how collections are searched.

Enter your desired collection name in the search box. (Retain the label of “collection” in the drop-down above the box.)

If you don’t know the exact collection name, just enter the first word or first few words. Click “Search”.

If your institution has previously opted into a holdings feed from a particular provider, then your collections may have already been selected.

For example, searching on the collection “ebooks on EBSCOhost” yields this result set:

| Collection                                                                                     | Provider            | Created                | In My Holdings                                                                        | Shared | Shared by | Action                       |
|------------------------------------------------------------------------------------------------|---------------------|------------------------|---------------------------------------------------------------------------------------|--------|-----------|------------------------------|
| <a href="#">All EBSCO Audiobooks</a><br>Customizable                                           | eBooks on EBSCOhost | 7/24/2012, 3:37:07 PM  | ✓ Held by my library<br>(4 / 37,358) Titles<br><a href="#">Deselect Collection</a>    | 2      |           | <a href="#">Add to Order</a> |
| <a href="#">All EBSCO eBooks</a><br>Customizable                                               | eBooks on EBSCOhost | 7/24/2012, 12:23:58 PM | ✓ Held by my library<br>(5 / 790,041) Titles<br><a href="#">Deselect Collection</a>   | 2      |           | <a href="#">Add to Order</a> |
| <a href="#">China Library Consortium Collection I</a><br>Non-Customizable                      | eBooks on EBSCOhost | 7/24/2012, 12:21:08 PM | ✓ Held by my library<br>(3,529 / 3,529) Titles<br><a href="#">Deselect Collection</a> | 2      |           | <a href="#">Add to Order</a> |
| <a href="#">China Library Consortium Collection II</a><br>Non-Customizable                     | eBooks on EBSCOhost | 7/24/2012, 12:22:39 PM | ✗ Not Held by my library<br>(0 / 3,011) Titles<br><a href="#">Select Collection</a>   |        |           | <a href="#">Add to Order</a> |
| <a href="#">China Library Consortium Collection III</a><br>Non-Customizable                    | eBooks on EBSCOhost | 7/24/2012, 3:50:53 PM  | ✗ Not Held by my library<br>(0 / 2,569) Titles<br><a href="#">Select Collection</a>   |        |           | <a href="#">Add to Order</a> |
| <a href="#">DragonSource Periodicals (Simplified Characters)</a><br>Customizable: Discontinued | eBooks on EBSCOhost | 8/22/2013, 11:14:10 AM | ✗ Not Held by my library<br>(0 / 0) Titles<br><a href="#">Select Collection</a>       |        |           | <a href="#">Add to Order</a> |
| <a href="#">DragonSource Periodicals (Traditional Characters)</a>                              | eBooks on EBSCOhost | 8/22/2013, 11:14:33 AM | ✗ Not Held by my library<br>(0 / 0) Titles<br><a href="#">Select Collection</a>       |        |           | <a href="#">Add to Order</a> |

Browse to find your collection alphabetically from the results set.

To select a particular collection click the “Select Collection” button as circled above.

You may repeat Step #14 as needed to select additional collections.

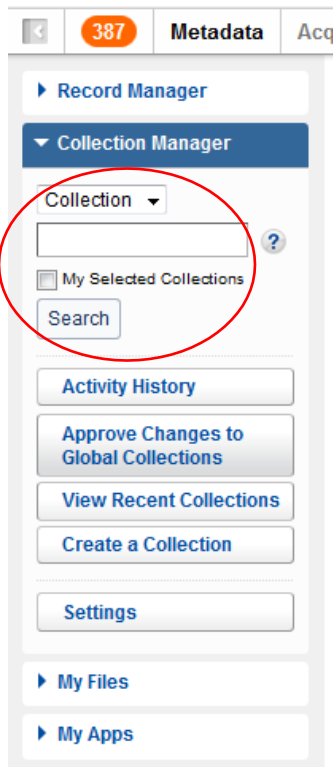
*Note: If your library participates in demand-driven acquisitions, please be sure to opt in for both the “DDA” and “Purchased” collections for that vendor.*



## Collection-specific preferences and enabling MARC delivery

15) Collection Manager offers some collection-specific options.

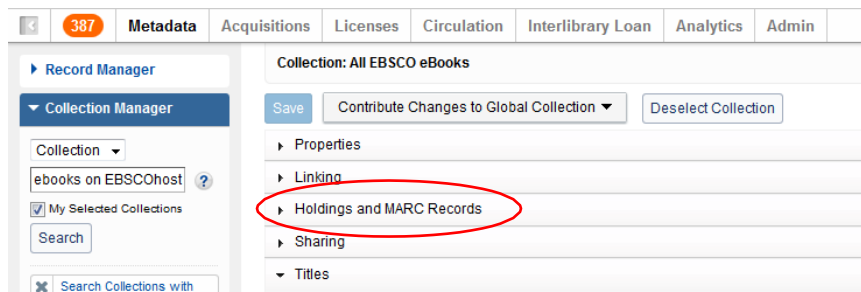
To view the collections for which your library has signed up, make sure in the left-hand navigation pane that the “My Selected Collections” box is checked, and that the search box is empty. Click the “Search” button.



The collections to which your library subscribes will appear in the right pane.

Click on the name of the collection whose setting you wish to modify.

16) Click “Holdings and MARC records”, which now appears among the options in the right pane.



17) Options will then expand.

The screenshot shows the 'Record Manager' interface with a top navigation bar containing tabs: Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. The 'Collection Manager' sidebar on the left includes a search bar with 'ebooks on EBSCOhost' and a 'Search' button. The main content area is titled 'Collection: All EBSCO eBooks' and contains several sections: 'Properties', 'Linking', and 'Holdings and MARC Records'. Under 'Holdings and MARC Records', there are three settings: 'Maintain WorldCat Holdings' (with 'Use institution setting' selected), 'Data Sources' (with 'All approved data sources' selected), and 'Export to Google Scholar' (with 'Use institution setting' selected). At the bottom, the 'Enable MARC Record Delivery' section has two radio buttons: 'Use institution setting' (which is selected and circled in red) and 'Disable for this collection'.

Next to “Enable MARC Record Delivery”, click the radio button for “Use institution setting”.

18) More options will expand.

This screenshot shows the expanded 'Enable MARC Record Delivery' settings. The 'Use institution setting' radio button is selected. Below it, the 'Delivery Settings' section is expanded, showing several options: 'Delivery Frequency' (with 'Specify delivery frequency for this collection' selected and a dropdown menu set to 'Daily'), 'Subsequent Record Output' (with 'Include only records with changes (updated, added or deleted) after initial delivery' selected), and 'Delivery File Output' (with 'Deliver records for this collection in a separate file' selected). A red arrow points to the 'Delivery Frequency' section, and another red arrow points to the 'Delivery File Output' section. Below these, there are more options: 'Interleave Local Holdings Records' (with 'Use institution setting' selected), 'Embed Local Bibliographic Data' (with 'Use institution setting' selected), and 'OCLC Symbols' (with 'Use institution setting' selected). A text box for 'OCLC Symbols' is also visible, with a note 'Up to 25 characters, alpha-numeric only'.

Options above were expanded further to illustrate how record delivery frequency and file naming

can be customized for each collection.

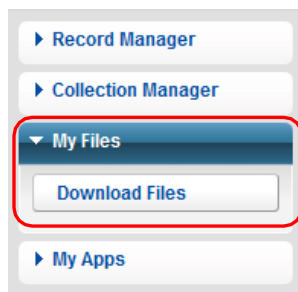
*Note: If your library participates in demand-driven acquisitions, you may wish to have your DDA and Purchased records delivered in separate files and define a filename segment for each:*

*The above steps may be performed for both the DDA and Purchased collections.*

Be sure to click the “Save” button in the upper left corner when you have finished defining your customizations.

## Downloading MARC files

- 19) You can download your records from the WorldShare interface. You do not need additional credentials. Expand “My Files” and click “Download Files”. Click the “Download” button to the right of the file you wish to download.



| <input checked="" type="checkbox"/> Hide Downloaded Files |                    |       |            |               |                          |
|-----------------------------------------------------------|--------------------|-------|------------|---------------|--------------------------|
| File Name                                                 | File Source        | Size  | Post Date  | Download Date | Action                   |
| metacoll.DXU.new.20140520.T104526.1.mrc                   | Collection Manager | 10 KB | 05/20/2014 |               | <a href="#">Download</a> |
| metacoll.DXU.new.20140428.T104526.1.mrc                   | Collection Manager | 10 KB | 04/28/2014 |               | <a href="#">Download</a> |

You will see files currently available for your library to download. Files are retained on the server for 90 days.

Though OCLC and its partners work closely together to ensure a record for every e-resource title, there may be variances in the number of records received because some partner delivery programs are tied to customer holdings rather than sales history. Also, records may be in OCLC's cataloging queue depending upon how partner metadata feeds coincide with titles' street dates. Lastly, past cataloging practices concerning multi-volume titles may have recommended a set record with multiple URLs being used for multi-volume titles.

(Additional details concerning file delivery timing and file name syntax may be found at <http://www.oclc.org/support/services/collection-manager/documentation/service-specific->

[settings/MARC-settings/record-retrieval-ftp.en.html](http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/en.html)).

## Additional information

Additional documentation may be found on OCLC's website at

<http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings.en.html>

<http://www.oclc.org/support/services/collection-manager/documentation.en.html>

<http://www.oclc.org/support/services/collection-manager/faq.en.html>

Virtual office hours:

Bring your questions about using the Collection Manager application or working with WorldCat knowledge base collections. No prior registration or password is required. Call anytime within the hour.

Office hour dates may be found at <http://www.oclc.org/support/services/collection-manager.en.html#officehours>

Recorded tutorials:

<http://www.oclc.org/support/training/portfolios/cataloging-and-metadata/worldshare-collection-manager.en.html>

To change or reset your WorldShare password please see the instructions at:

<http://www.oclc.org/content/dam/support/worldshare-metadata/password.pdf>

Managing proxy information:

<http://www.oclc.org/support/services/collection-manager/documentation/settings-glossary/linking-settings.en.html>

When reviewing these links please note that the Collection Manager options available to you may vary depending upon whether your library has an OCLC cataloging subscription.

## Appendix: Managing WorldCat holdings

*Please note: The following options are only available to libraries having a current OCLC cataloging or CatExpress subscription.*

### Syncing your Knowledge Base holdings with WorldCat

Libraries having a current OCLC cataloging or CatExpress subscription may wish to synchronize their Knowledge Base holdings with their WorldCat holdings, such that the library's OCLC symbol is set on the WorldCat records belonging to the library's collections.

To do this, click "Settings" in the left-hand navigation pane, and then click "WorldCat Holdings". Make sure that the radio button for "Yes" is selected.

Click "Save" in the upper left of the pane.

The screenshot displays the OCLC Knowledge Base interface. At the top, a navigation bar includes tabs for Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. The left-hand navigation pane features a 'Record Manager' section with a 'Collection Manager' dropdown, a search bar, and buttons for 'Activity History', 'Approve Changes to Global Collections', 'View Recent Collections', 'Create a Collection', and 'Settings' (which is circled in red). The main content area is titled 'Settings' and contains a 'Save' button. Below this, there are expandable sections for 'OCLC Symbol', 'Knowledge Base Data', and 'WorldCat Holdings' (circled in red). The 'WorldCat Holdings' section is expanded, showing the text 'Maintain WorldCat holdings for knowledge base titles.' and a 'Maintain Holdings' section with two radio buttons: 'Yes' (selected and circled in red) and 'No'. To the right of the 'Yes' radio button, it says 'Your symbol is [OCWMS](#).' Below the 'WorldCat Holdings' section, there are links for 'Proxy and Authentication', 'Provider Settings', and 'Sharing'.

## Foregoing records already having your library's holdings set in WorldCat

Your first MARC file from Collection Manager will comprise records for all of the titles to which your library is entitled for that collection. This sets a baseline for future record deliveries for newly purchased titles. However, this initial file may contain records already having your WorldCat holdings attached. The benefits to receiving new copies of these records is that they will have your vendor's (vendors') URL(s) attached and they will reflect the current instance of the record in WorldCat, as well as your current editing preferences, if any.

But if you should decide that you'd rather not receive such records, you may opt out of getting records already having your holdings attached by referring to the "Holdings and MARC records" option described in Step #16 above under "Set-specific preferences".

Expand the arrow next to "Holdings and MARC records", ensure that the radio button next to "Enable MARC record delivery" is selected for "Use institution setting", and scroll down to the option for "WorldCat Holdings", shown below. Choose "No" to opt out.

|                   |                                                         |
|-------------------|---------------------------------------------------------|
| WorldCat Holdings | Include new records for titles already held in WorldCat |
|                   | <input type="radio"/> Yes                               |
|                   | <input checked="" type="radio"/> No                     |

Please click the "Save" button in the upper left of the pane.