OCLC WorldShare Collection Manager Training Webinar

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Session Goals

• Overview of WorldShare Collection Manager/WorldCat knowledge base
• Provide overview of settings for Collection Manager
• Discuss Selecting/Creating Collections
• Discuss Future Improvements to Collection Manager
• Questions
• Resources
GETTING STARTED WITH COLLECTION MANAGER
What is the knowledge base/Collection Manager

WorldCat Knowledge Base:
• A database containing metadata (including linking information) about FULL TEXT electronic resources: E-Journals and E-Books

WorldShare Collection Manager:
• Allows users to manage data held within the knowledge base.
Global Collections Data Updates

• Managed by OCLC on behalf of KB users
• Titles are added/deleted from existing collections
• Title metadata is updated
• New collections are added based on expanding collaboration with E-Resource vendors

Join us at the community center to find out about new collections and provider added to the Global KB
THE COLLECTION MANAGER
USER INTERFACE
Collection Manager Interface
Collection Manager Interface (cont.)
INSTITUTION SETTINGS
Settings
General Account Settings

- **OCLC Symbol**
  - Your OCLC symbol will be used to maintain WorldCat holdings and output MARC records.
  - Options: Refresh from WorldCat Registry, OCLC Symbol (WLN, None).

- **WorldCat Holdings**
  - Maintain WorldCat holdings for knowledge base titles.
  - Options: Yes (Your symbol is WLN), No.
Proxy and Authentication

- Proxy URL has to be entered if your access is proxied
  - EZ Proxy
  - III WAM Proxy
Institution-level Sharing

- Use this option to share your entire KB with another institution.
  - Enter Library Name or Registry ID
- Library shared-with must subscribe
  - Subscribing will automatically begin selecting the collections in the sharing library’s KB
MARC Records - Customizations

- Enable MARC Record delivery
- Delete Fields and Subfields
  - Select variable field from dropdown
- Add Fields
  - Enter variable field into textbox
- Add/Remove addition fields
  - Green plus
  - Red minus
- Select from Value dropdown
MARC Records – WorldCat Updates

- Get updates when WorldCat records are modified
- Specify which variable fields produce record deliveries
- None by default
WorldCat Updates – Include/Exclude

- Located in the Update Conditions area of WorldCat Updates tab
  - Click “Select options for specific changes to the WorldCat master record” to activate
- Use these options to only receive relevant updates
  - Can result in large volume of Update records if not utilized
MARC Records – Record Delivery

- Set the default delivery frequency for all collections
  - Daily by default
  - Weekly, Monthly, Quarterly
- File Output
  - Serials
  - WorldCat holdings collection (recommended)
Delivery Frequencies

- Daily – delivered Monday through Friday
- Weekly – delivered at the end of each week, usually late Friday or Saturday
- Monthly – delivered at the end of each month, process begins on last Friday of the month.
- Quarterly – delivered on the first weekend of the quarter (January, April, July, October)
Notes About MARC Record delivery

1. First-time rule: If MARC record delivery is enabled at the time the collection is create (for custom collections) or selected (for standard collections), then records will output in the very next run. If MARC record delivery is enabled after the next CM run, records will be set to the delivery schedule.

2. Most Collections do not have 100% OCLC Number (OCN) Coverage. Records are only delivered for titles that have OCNs. Users can assist in updating the OCNs in a collection by looking up the record in WorldCat and adding the OCN to the title in the knowledge base. Libraries can also catalog items in WorldCat to create an OCN to add to titles in the knowledge base. Libraries can also submit the OCLC Number Correction Form to get OCNs updated in the knowledge base.

3. Multi-volume titles that are cataloged under the same OCN in the knowledge base will output MARC records containing only one URL.
SEARCHING FOR COLLECTIONS
Collection Manager Search Basics

• **My Selected Collections**
  – What is available in the KB vs what you selected

• **Search types**
  – Provider: Searches provider name and provider ID
  – Collection: Searches collection name, collection ID, provider name, provider ID
  – Title: Searches all of the above and also all of the title information (ISBN/ISSN, OCLC number, etc)

• **Filters**
  – Custom collections, Open Access, Holdings Enabled, Shared, Database-only, etc
### Searching

#### Collection Manager

- **Record Manager**
- **Collection Manager**

#### Search Collections with "Springer"

- **My Selected Collections**

#### Filter by
- **Select**

Results: 10 of 642

<table>
<thead>
<tr>
<th>Collection</th>
<th>Provider</th>
<th>Account Number</th>
<th>Created</th>
<th>In My Holdings</th>
<th>Shared</th>
<th>Shared by</th>
<th>Action</th>
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<td>Credo Reference</td>
<td>8/22/2013, 11:24:18 AM</td>
<td>Held by my library (3 / 33) Titles</td>
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<td></td>
<td></td>
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Searching – My Selected Collections

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<th>Provider</th>
<th>Account Number</th>
<th>Created</th>
<th>In My Holdings</th>
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SELECTING COLLECTIONS IN FULL OR IN PART
Selecting Collections and Titles

• Identify access in relation to collection, and then select

• Customizable vs. Non-Customizable
  – Customizable: Can select individual titles
  – Non-Customizable: Collection can only be selected in its entirety

• Select subset of titles vs. Select full collections (customizable collections)
  – Two different kinds of interaction with a collection—can only have one at a time
    • Subset: Can add or remove titles at any time
    • Full: Have to change to subset to remove individual titles
Customizable and Non-Customizable collections

• Customizable collections have a pencil icon
KBART Method: File Upload

- Selecting titles based on a Provider File
  - Download global collections
  - Compare to provider file and isolate titles you want to select in your KB.
  - Re-upload with “select” in the ACTION (Column Z)
  - Scope for new collections can be “Update existing collection” or “Replace holdings in collection”
CREATE CUSTOM COLLECTIONS
Custom Collections

• Create a new knowledge base collection
• Add titles
  – By searching and selecting individual titles
  – Via KBART file upload (Recommended)
  – Custom Collections can be shared with other KB users.
  – Library’s with access to the shared collection can contribute changes to the shared collection.
Custom Collections - Properties

- Add Collection Name (can be modified later)
- Add Provider and Description
- Set Customizable/Non-Customizable
  - Important for shared collections.
  - If configured as customizable, OCLC Entry IDs must be included in the KBART data!!
- Set collection type
Custom Collections - Titles

- Add titles from the dropdown below the titles list
  - Manual
  - OCN Lookup
- More Actions
  - Upload KBART
  - Download KBART
COLLECTION-LEVEL SETTINGS
Enable MARC Delivery for the collection

- Click on collection name to access collection-level settings
- Enable MARC Record delivery from Holdings and MARC Records accordion

NOTE: If receiving MARC records, delivery must be enabled at both the institution and collection level.
Delivery Settings

- Set collection-level delivery frequency
- Subsequent Record Output
  - Only changes after initial delivery (default)
  - Complete set with every delivery
- Deliver records in separate files
  - Output records by collection
SHARING COLLECTIONS AND COOPERATIVE MANAGEMENT
Collection-level Sharing

- Similar to institution-level sharing
  - Enter library name or Registry ID and click “Add”
  - Shared-with library will then be able to select the shared collection in their own KB.
Recent cooperatively-managed collections

- American Museum of Natural History Research Library
- American Physical Society Publications
- Biblical Reference Ebook Collection (Saint Charles Borromeo Seminary)
- British History Online
- Chronicling America: Historic American Newspapers
- Digitalia Hispanica (Fuller Theological Seminary)
- EBSCO PsycBooks extra
- Field Museum Custom Collection (The Field Museum of Natural History)
- Open access ebooks and papers (McGill)
- The Other Voice in Early Modern Europe
REPORTS
Reports

- Enable Email Reports
- Enter 9-digit cataloging authorization code
- Enter email addresses, separate with semi-colon
BATCHLOAD WITH DATA SYNC COLLECTIONS
Data Sync Collections

• Use Collection Manager to create Data Sync Collections
• Submit records through Uploads in My Files or FTP.
• Data Sync now accepts Unicode files
FUTURE DEVELOPMENTS IN FUNCTIONALITIES
Unicode

Libraries are able to catalog in any script now.

Collection Manager can output records in any script.
Germaneli mxatvrebi da Kavkasia

Author: German painters and the Caucasus / general editorship George Kalandia.

Publisher: Sak’art’velos t’eating, musikils, kineqas da k’oreograp’ils saxelmcpl’o muzeumi.


Database: WorldCat


Rating: (not yet rated) 0 with reviews - Be the first

Subjects: Painting, German -- Georgia (Republic) -- Exhibitions.
Painting, German -- 19th century -- Exhibitions.
Caucasus -- In art -- Exhibitions.

More like this: Similar items
Coming Soon: Collection Isolation

• Libraries will have the option to have collections treated as separate entities
  • Currently, if a title is held in two collections, records output for that title will reflect the information from both collections.
    • If separate file output option is selected, duplicate record will be output for both collections containing information from both collections.
    • Coming soon, if a title is held in two collections, separate records with collection-specific information will output for each collection.
  • Expected availability: Quarter Three.
Remember…

**Collection Manager** is feature-rich and flexible. The challenge is that Collection Manager is feature-rich and flexible.
Questions?
WorldShare Collection Manager Resources

• Additional (free) training for Collection Manager is available: https://www.oclc.org/support/training/portfolios/cataloging-and-metadata/worldshare-collection-manager.en.html

• Documentation: https://www.oclc.org/support/services/collection-manager/documentation.en.html

• MARC record delivery documentation: https://www.oclc.org/support/help/collectionmanager/#record_processing/data_processing.htm

• Details about New, Update and Delete Records: https://www.oclc.org/support/help/collectionmanager/#record_processing/new_updates_deletes.htm

• CM Office Hours: http://www.oclc.org/support/services/collection-manager.en.html#officehours

• Report problems to your regional support office: https://www.oclc.org/support/contact-support.en.html
Resources Continued

Product Insights session led by OCLC product managers. February 13th, 2:30-4:00pm

Join OCLC product management staff for a WorldShare Collection Manager product insight session. Product Insights sessions are designed to gather community feedback on existing functionality and workflows, review new feature requirements, discuss new ideas for improving products, and maybe show-off a wireframe or two. These insight sessions are open for community members to attend.
Thank you!

Josh Benson
Implementation Manager, WorldShare Collection Manager

Because what is known must be shared.