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# OCCLC WorldShare Collection Manager Training Webinar

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# Josh Benson

Implementation Manager

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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

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# GETTING STARTED WITH COLLECTION MANAGER

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# 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

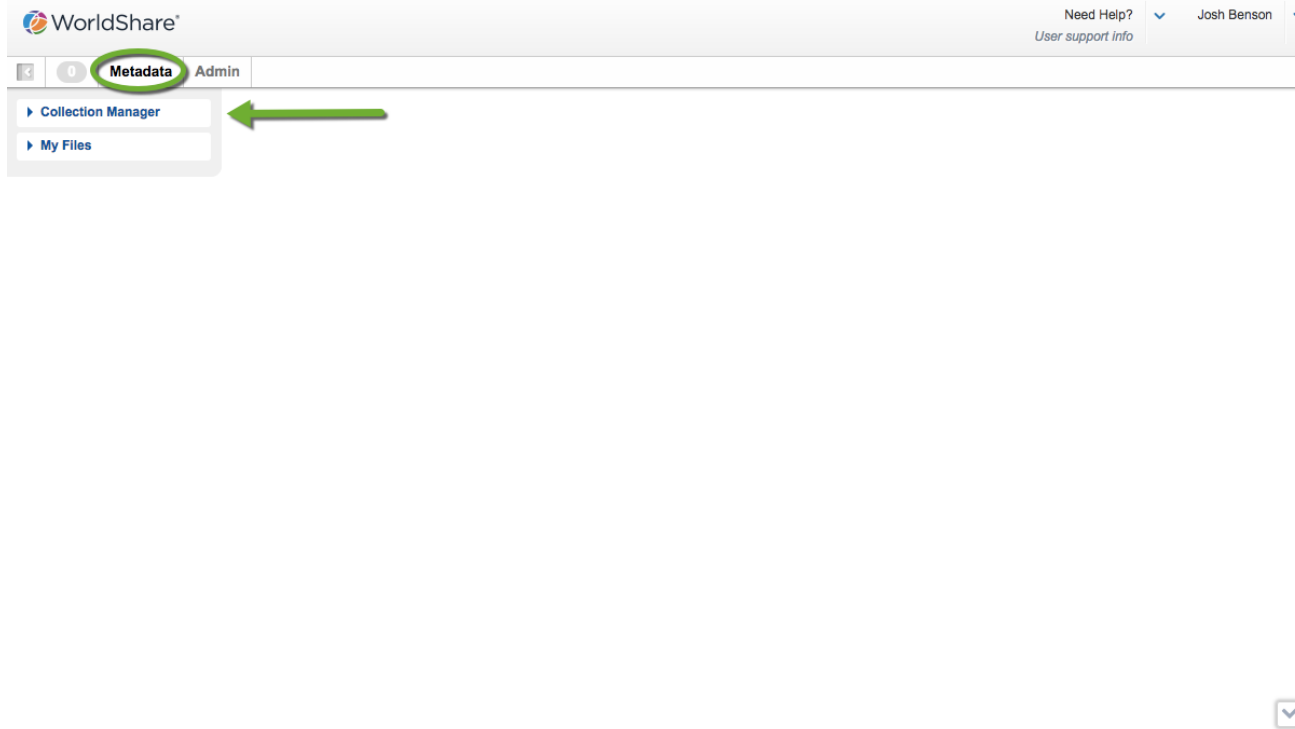
Join us at the [community center](#) to find out about new collections and provider added to the Global KB

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# THE COLLECTION MANAGER USER INTERFACE



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# Collection Manager Interface







# Collection Manager Interface (cont.)

WorldShare® Need Help?  User support info Josh Benson 

 0 Metadata Admin

**Collection Manager**

Collection   
 

☒ My Selected Collections

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

My Files

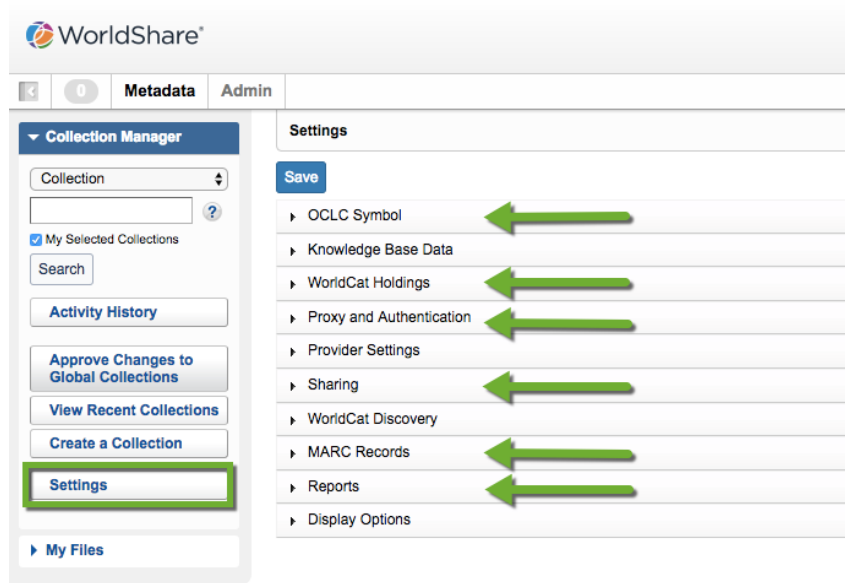


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# INSTITUTION SETTINGS

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# Settings



WorldShare<sup>®</sup>

Metadata Admin

**Collection Manager**

Collection

☒ My Selected Collections

[Activity History](#)

[Approve Changes to Global Collections](#)

[View Recent Collections](#)

[Create a Collection](#)

**Settings**

[My Files](#)

**Settings**

[Save](#)

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

# General Account Settings

- OCLC Symbol

▼ OCLC Symbol

Your OCLC symbol will be used to maintain WorldCat holdings and output MARC records.

[Refresh from WorldCat Registry](#)

OCLC Symbol ☒ WILSN [i](#)  
☐ None

- WorldCat Holdings

▼ WorldCat Holdings

Maintain WorldCat holdings for knowledge base titles.

Maintain Holdings ☒ Yes Your symbol is [WILSN](#).  
☐ No

Settings

[Save](#)

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▶ MARC Records
- ▶ Reports
- ▶ Display Options

# Proxy and Authentication

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

Proxy and Authentication

Proxy | Google Scholar | Download Authentication | Global Access | Open Access In Resolver

**Proxy**

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.

**Proxy Type**

☐ None

☒ EZ Proxy

☐ III WAM Proxy

**Base URL \***

**Username**  ?

**Password**

# 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

The screenshot shows a web interface for sharing knowledge base collections. At the top, there is a dropdown menu labeled 'Sharing'. Below it, there are two tabs: 'Share All' (which is active) and 'Subscribe'. The main heading is 'Share All Knowledge Base Collections'. Below this, a paragraph explains: 'Share all knowledge base collections with selected libraries. To share individual collections, access a collection and use its sharing accordion. If a collection is being used by another institution, ask them to discontinue use before unsharing.' Under the heading 'Share to', there are two radio button options: 'A single library' (which is selected) and 'Multiple libraries'. Next to 'A single library' is a text input field labeled 'Enter Library Name or Number' and an 'Add' button. At the bottom, there is a table with three columns: 'Shared', 'Usage', and 'Share'. The table is currently empty.

| Shared | Usage | Share |
|--------|-------|-------|
|--------|-------|-------|

# 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

The screenshot shows the 'Settings' page for MARC Records. At the top, there is a 'Save' button. Below it, the 'MARC Records' section is expanded. Under 'MARC Records', there is a toggle for 'Enable MARC Records Delivery' set to 'Yes' (radio button), with a note 'Your symbol is [TS249](#)'. Below this, there are four tabs: 'Customize Records', 'WorldCat Updates', 'Record Delivery', and 'Cataloging Partner Options'. The 'Customize Records' tab is active. It contains a heading 'Customize Records' and a subheading 'All Collections'. Below this, there is a form for 'Holding Library Code (049 \$a)' with an empty text box. The form is divided into three sections: 'Delete Fields', 'Delete Subfields', and 'Add Fields'. Each section has a 'Tag' dropdown, 'Ind 1' and 'Ind 2' dropdowns, and a 'Subfield' dropdown. The 'Add Fields' section also has a 'Value' dropdown. Each section has a green plus button, a red minus button, and a 'Reset' button.

Settings

Save

▼ MARC Records

Enable MARC Records Delivery ☒ Yes Your symbol is [TS249](#) ☐ No

Customize Records WorldCat Updates Record Delivery Cataloging Partner Options

Customize Records

Customize the information included in your institution's MARC records. You can also control MARC options for an individual collection at the collection level.

All Collections

Holding Library Code (049 \$a)

Delete Fields Tag  Ind 1  Ind 2    Reset

Delete Subfields Tag  Ind 1  Ind 2  Subfield    Reset

Add Fields

Tag  Ind 1  Ind 2    Reset

Subfield

Value

# MARC Records – WorldCat Updates

- Get updates when WorldCat records are modified
- Specify which variable fields produce record deliveries
- None by default

The screenshot shows the 'Settings' page for 'MARC Records'. At the top, there is a 'Settings' header and a 'Save' button. Below this, the 'MARC Records' section is expanded. It contains a toggle for 'Enable MARC Records Delivery' set to 'Yes' (radio button selected), with a note 'Your symbol is [TS249](#)'. Below the toggle are four tabs: 'Customize Records', 'WorldCat Updates' (active), 'Record Delivery', and 'Cataloging Partner Options'. The 'WorldCat Updates' tab is selected, showing the 'Updates' section. It asks to 'Select the option for WorldCat Updates.' with three radio buttons: 'None', 'Based on changes to WorldCat master records for my knowledge base and query collections' (selected), and 'Based on changes to WorldCat master records for my knowledge base, query, data sync collections and WorldCat holdings'. Below this is the 'Update Conditions' section, which asks to 'Define criteria to determine when you would like to receive updated records based on changes to the WorldCat master record.' with two radio buttons: 'Any change to the WorldCat master record' and 'Select options for specific changes to the WorldCat master record' (selected). At the bottom, there are two expandable sections: 'Specify Including Conditions' and 'Specify Excluding Conditions'.

Settings

Save

▼ MARC Records

Enable MARC Records Delivery ☒ Yes Your symbol is [TS249](#). ☐ No

Customize Records WorldCat Updates Record Delivery Cataloging Partner Options

Updates

Select the option for WorldCat Updates.

☐ None

☒ Based on changes to WorldCat master records for my knowledge base and query collections

☐ Based on changes to WorldCat master records for my knowledge base, query, data sync collections and WorldCat holdings

Update Conditions

Define criteria to determine when you would like to receive updated records based on changes to the WorldCat master record.

☐ Any change to the WorldCat master record

☒ Select options for specific changes to the WorldCat master record

► Specify Including Conditions

► Specify Excluding Conditions



# 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

Specify Including Conditions

Variable Fields

Deliver records if the following fields are added, updated, or deleted in the master record:

Encoding Levels

Deliver records if the Encoding Level changes to the following value(s):

☒ Blank

☐ 5

☒ 1

☐ M

☒ 1

☐ 7

☐ K

☐ 4

☐ 8

☐ L

Other Options

Deliver records if the:

☐ Date/Publication Status (DtSt) changes

☐ 040 changes to include 040 \$e rda

Specify Excluding Conditions

Material Types

Do not deliver records of selected material type(s):

☐ Book

☐ Map

☐ Sound Recording

☐ Computer File

☐ Mixed Material

☐ Visual Material

☒ Continuing Resource

☐ Score

Publication Date

Do not deliver records for materials published in:

Year

 and before

My Updates

Do not deliver records upgraded by my library. Choose the OCLC symbol(s):

☒ STF

☐ STFGB

Note: OCLC symbols are pulled from the WorldCat Registry. To add or remove symbols, visit your WorldCat Registry record.

# 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)

The screenshot shows the 'Settings' page for MARC Records. At the top, there is a 'Settings' header and a 'Save' button. Below this, the 'MARC Records' section is expanded. It contains the 'Enable MARC Records Delivery' toggle, which is set to 'Yes' with a radio button. Next to it, it says 'Your symbol is [TS249](#)'. Below the toggle are two radio buttons: 'Yes' (selected) and 'No'. Underneath, there are four tabs: 'Customize Records', 'WorldCat Updates', 'Record Delivery' (selected), and 'Cataloging Partner Options'. The 'Record Delivery' tab is active, showing the 'Record Delivery' section. It includes a description: 'Customize how often and under what conditions your records will be delivered.' Below this, there are three settings: 'Standard' (set to 'MARC 21 with MARC-8'), 'Delivery Frequency' (set to 'Daily' with a help icon), and 'File Output' (with two checkboxes: 'Deliver my serials in a separate file (.ser)' and 'Deliver records for WorldCat holdings collection in a separate file (.wcholdings)').

Settings

Save

▼ MARC Records

Enable MARC Records Delivery ☒ Yes Your symbol is [TS249](#). ☐ No

Customize Records WorldCat Updates Record Delivery Cataloging Partner Options

Record Delivery

Customize how often and under what conditions your records will be delivered.

Standard

Delivery Frequency  ?

File Output

☐ Deliver my serials in a separate file (.ser)

☐ Deliver records for WorldCat holdings collection in a separate file (.wcholdings)

# 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.

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# SEARCHING FOR COLLECTIONS

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# 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

Record Manager

Collection Manager

Collection ⌵

Springer ?

☐ My Selected Collections

Search

☒ Search Collections with "Springer"

Activity History

Approve Changes to Global Collections

View Recent Collections

Create a Collection

Settings

My Files

My Apps

Search Collections with "Springer"

Collection Actions ⌵

Filter by Select ⌵ [Reset](#)

Results 1 - 10 of 642 ↻

Rows 10 ⌵

<< < 1 2 3 4 5 > >>

| <input type="checkbox"/> | Collection  | Provider        | Account Number | Created                | In My Holdings  | Shared | Shared by                              | Action                       |
|--------------------------|---|-----------------|----------------|------------------------|---|--------|--|------------------------------|
| <input type="checkbox"/> | <a href="#">Brill Academic Publishers</a><br>Non-Customizable : <span>Discontinued</span> | Springer        |                | 9/25/2013, 3:52:42 PM  | <span>⊘</span> Not Held by my library<br>( 0 / 0 ) Titles<br><a href="#">Select Collection</a>  |        |  | <a href="#">Add to Order</a> |
| <input type="checkbox"/> | <a href="#">Credo Springer Publishing Collection v1</a><br>Customizable                   | Credo Reference |                | 8/22/2013, 11:24:18 AM | <span>✓</span> Held by my library<br>( 3 / 33 ) Titles<br><a href="#">Deselect Collection</a>   |        |  | <a href="#">Add to Order</a> |
| <input type="checkbox"/> | <a href="#">Credo Springer Publishing Collection v1</a><br>Customizable                   | Credo Reference |                | 3/4/2015, 2:08:13 PM   | <span>⊘</span> Not Held by my library<br>( 0 / 33 ) Titles<br><a href="#">Select Collection</a> |        | <a href="#">OCLC CSD Test WMS Site</a> | <a href="#">Add to Order</a> |
| <input type="checkbox"/> | <a href="#">Credo Springer Publishing Collection v2</a><br>Customizable                   | Credo Reference |                | 9/24/2013, 11:07:46 PM | <span>✓</span> Held by my library<br>( 1 / 54 ) Titles<br><a href="#">Deselect Collection</a>   |        |  | <a href="#">Add to Order</a> |
| <input type="checkbox"/> | <a href="#">Credo Springer Publishing Collection v3</a><br>Customizable                   | Credo Reference |                | 6/25/2015, 2:06:55 PM  | <span>⊘</span> Not Held by my library<br>( 0 / 58 ) Titles<br><a href="#">Select Collection</a> |        | <a href="#">OCLC CSD Test WMS Site</a> | <a href="#">Add to Order</a> |

# Searching – My Selected Collections

Record Manager

Collection Manager

Collection ▼

Springer ?

☒ My Selected Collections

Search

✕ Search Collections with "Springer", My Library Holdi...

✕ Search Collections with "Springer complete"

✕ Search Collections with "Springercomplete"

✕ Search Collections with "Springer all"

✕ Search Collections with "Springer"

✕ Collection: Springer Complete eBooks

Activity History

Approve Changes to Global Collections

View Recent Collections

Search Collections with "Springer", My Library Holdings Only


Collection Actions ▼

Filter by Select Reset

Results 1 - 10 of 19 ↻

Rows 10 1 2 > >>

| <input type="checkbox"/> | Collection   | Provider        | Account Number | Created                | In My Holdings  | Shared | Shared by | Action                        |
|--------------------------|--|-----------------|----------------|------------------------|---|--------|-----------|-------------------------------|
| <input type="checkbox"/> | <a href="#">Credo Springer Publishing Collection v1</a><br><small>Customizable</small> | Credo Reference |                | 8/22/2013, 11:24:18 AM | <span>✓</span><br>Held by my library<br>( 3 / 33 ) Titles<br><a href="#">Deselect Collection</a>    |        |           | <button>Add to Order</button> |
| <input type="checkbox"/> | <a href="#">Credo Springer Publishing Collection v2</a><br><small>Customizable</small> | Credo Reference |                | 9/24/2013, 11:07:46 PM | <span>✓</span><br>Held by my library<br>( 1 / 54 ) Titles<br><a href="#">Deselect Collection</a>    |        |           | <button>Add to Order</button> |
| <input type="checkbox"/> | <a href="#">Credo Springer Publishing Collection v3</a><br><small>Customizable</small> | Credo Reference |                | 2/26/2014, 1:54:29 PM  | <span>✓</span><br>Held by my library<br>( 58 / 58 ) Titles<br><a href="#">Deselect Collection</a>   |        |           | <button>Add to Order</button> |
| <input type="checkbox"/> | <a href="#">Credo Springer Verlag v1</a><br><small>Customizable</small>                | Credo Reference |                | 1/15/2015, 2:25:20 PM  | <span>✓</span><br>Held by my library<br>( 5 / 13 ) Titles<br><a href="#">Deselect Collection</a>    |        |           | <button>Add to Order</button> |
| <input type="checkbox"/> | <a href="#">Springer</a><br><small>Customizable</small>                                | Springer        |                | 7/24/2013, 8:25:25 PM  | <span>✓</span><br>Held by my library<br>( 2 / 1,795 ) Titles<br><a href="#">Deselect Collection</a> |        |           | <button>Add to Order</button> |

 OCLC



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# SELECTING COLLECTIONS IN FULL OR IN PART

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# 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

|                          |   |              |  |                        |  |  |                              |
|--------------------------|---|--------------|--|------------------------|--|--|------------------------------|
| <input type="checkbox"/> |  <a href="#">Springer Journals All Americas 2015</a><br>Non-Customizable | SpringerLink |  | 1/14/2015, 11:56:43 PM |  <b>Not Held</b> by my library<br>( 0 / 1,583 ) Titles<br><a href="#">Select Collection</a> |  | <a href="#">Add to Order</a> |
|--------------------------|---|--------------|--|------------------------|--|--|------------------------------|

- Customizable collections have a pencil icon

|                          |  |              |  |                        |  |  |                              |
|--------------------------|--|--------------|--|------------------------|--|--|------------------------------|
| <input type="checkbox"/> |  <a href="#">Springer Complete eBooks</a><br> Customizable | SpringerLink |  | 9/15/2014, 11:14:55 AM |  <b>Not Held</b> by my library<br>( 0 / 189,724 ) Titles<br><a href="#">Select Collection</a> |  | <a href="#">Add to Order</a> |
|--------------------------|--|--------------|--|------------------------|--|--|------------------------------|

# 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”

The screenshot displays the KBART Collection Manager interface. At the top, there is a navigation bar with tabs: Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. Below this, the 'Collection Manager' section is active, showing a sidebar with options like 'Record Manager', 'Collection Manager', 'Activity History', 'Approve Changes to Global Collections', 'View Recent Collections', 'Create a Collection', and 'Settings'. The main area is titled 'Collection: Collection Manager Example Collection' and contains a 'Save' button, a 'Delete Collection' button, and a list of expandable sections: Properties, Linking, Holdings and MARC Records, Sharing, Titles (with a 'More Actions' button), and History. The 'Titles' section is currently expanded.

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# CREATE CUSTOM COLLECTIONS

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# 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

The screenshot shows the 'Create a Knowledge Base Collection' form. It has a 'Create' button at the top left. Below it is a 'Properties' section with a dropdown arrow. The form contains several input fields: 'Collection Name' (with a red asterisk), 'Collection ID' (pre-filled with 'customer.127950.450' and a red asterisk), 'Provider', 'Created', 'Last Updated', and 'Description' (a larger text area). Below these fields are two tabs: 'Notes' and 'Show Details'. Under the 'Show Details' tab, there are two sections. The first is 'When Sharing' with two radio button options: 'Libraries can select individual titles (Customizable)' and 'Libraries can only select the entire collection (Non-Customizable)'. The second section is 'Collection Type' with three checkboxes: 'Demand Driven Acquisitions', 'Document Delivery', and 'Open Access'.

Create a Knowledge Base Collection

Create

▼ Properties

Collection Name \*

Collection ID \*

Provider

Created

Last Updated

Description

Notes Show Details

When Sharing \* ☐ Libraries can select individual titles (Customizable)  
☒ Libraries can only select the entire collection (Non-Customizable)

Collection Type ☐ Demand Driven Acquisitions  
☐ Document Delivery  
☐ Open Access

# Custom Collections - Titles

- Add titles from the dropdown below the titles list
  - Manual
  - OCN Lookup
- More Actions
  - Upload KBART
  - Download KBART

Collection: Example KB Standard Collection

[Save](#) [Delete Collection](#)

▸ Properties

▸ Linking

▸ Holdings and MARC Records

▸ Sharing

▼ Titles [More Actions](#)

Search within  [Search](#)

☒ My Selected Titles ☐ All Titles

**Titles**

☐ Titles available individually ☐ Titles with current issues

**Format**

☐ E-book/Proceeding ☐ Audio

☐ Image ☐ Video ☐ Other

**Journal Coverage**

☐ Full Text ☐ Print

☐ Selected Full Text ☐ Abstracts ☐ Indexed

[Reset](#)

Results 0 - 0 of 0

Rows  [◀](#) [▶](#) [⌂](#)

| Title             | Content Availability | Identifiers | In My Holdings | Action |
|-------------------|----------------------|-------------|----------------|--------|
| No records found. |                      |             |                |        |

Results 0 - 0 of 0

Rows  [◀](#) [▶](#) [⌂](#)

[Add a Title](#) [Mark collection as database-only \(no titles\)](#)

▸ History



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# COLLECTION-LEVEL SETTINGS

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# 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.**

Collection: Springer English/International eBooks 2010 - Full Set

[Save](#) [Contribute Changes to Global Collection](#) [Deselect Collection](#)

► Properties

► Linking

▼ Holdings and MARC Records

Maintain WorldCat Holdings ☒ Use institution setting ☐ Disable for this collection

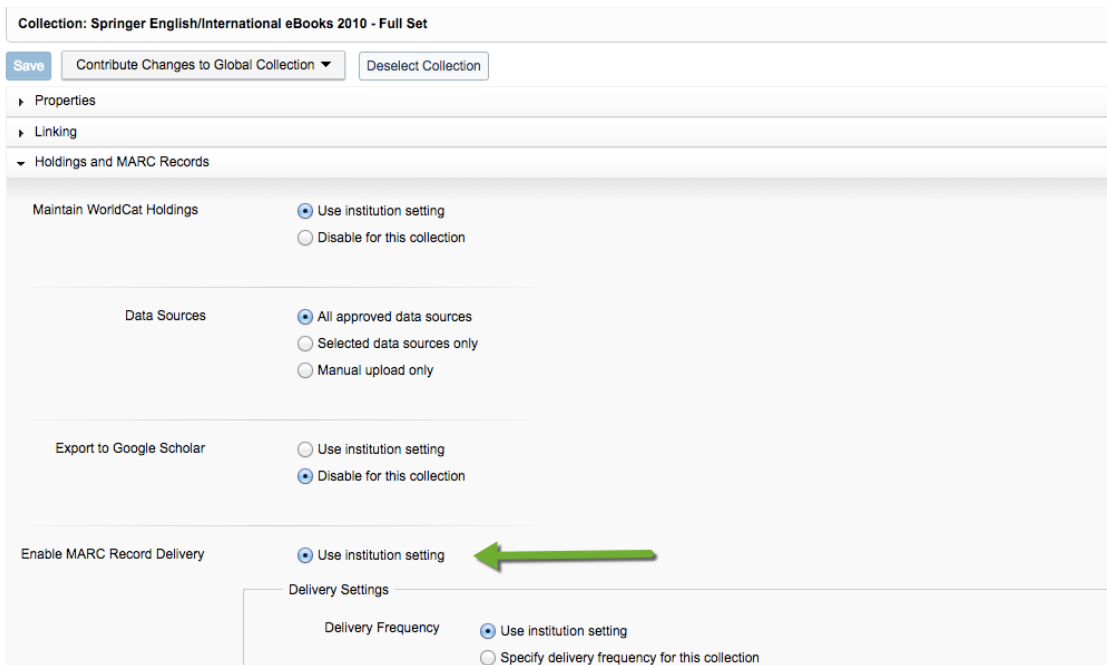
Data Sources ☒ All approved data sources ☐ Selected data sources only ☐ Manual upload only

Export to Google Scholar ☐ Use institution setting ☒ Disable for this collection

Enable MARC Record Delivery ☒ Use institution setting ☐ Specify delivery frequency for this collection

Delivery Settings

Delivery Frequency ☒ Use institution setting ☐ Specify delivery frequency for this collection



# 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

enable MARC Record Delivery ☒ Use institution setting

### Delivery Settings

|                                   |  |
|-----------------------------------|--|
| Delivery Frequency                | <input checked="" type="radio"/> Use institution setting<br><input type="radio"/> Specify delivery frequency for this collection   |
| Subsequent Record Output          | <input checked="" type="radio"/> Include only records with changes (updated, added or deleted) after initial delivery<br><input type="radio"/> Include a complete set of records with every delivery   |
| Delivery File Output              | <input type="radio"/> Deliver records for this collection in the same file as other collections<br><input checked="" type="radio"/> Deliver records for this collection in a separate file<br><input type="text" value="SpringerEngInt2010"/><br><small>Up to 25 characters, alpha-numeric only.</small> |
| Interleave Local Holdings Records | <input checked="" type="radio"/> Use institution setting<br><input type="radio"/> Disable for this collection  |
| Embed Local Bibliographic Data    | <input checked="" type="radio"/> Use institution setting<br><input type="radio"/> Disable for this collection  |
| OCLC Symbols                      | OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data<br><input checked="" type="radio"/> Use institution setting<br><input type="radio"/> OCLC symbols specified for this collection   |
| WorldCat Holdings                 | Include new records for titles already held in WorldCat<br><input checked="" type="radio"/> Yes<br><input type="radio"/> No  |

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# SHARING COLLECTIONS AND COOPERATIVE MANAGEMENT

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# 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.

The screenshot shows the WorldShare Collection Manager interface. The top navigation bar includes the WorldShare logo, a 'Need Help?' link, and a user profile for 'Josh Benson'. The main content area is titled 'Collection: Wiley Blackwell Reference Online'. On the left, a sidebar contains a 'Collection Manager' section with a search box and a list of collections, including 'Collection: Wiley Blackwell Reference Online'. The main area has tabs for 'Metadata' and 'Admin'. The 'Sharing' tab is selected, and a green arrow points to it. The 'Sharing' section includes a 'Choose libraries with which to share your collection.' prompt, an 'Add' button, and a 'Share to multiple libraries' button. Below this is a table with columns for 'Institution', 'Use', and 'Share'. The table currently shows 'No records found.' and a 'More Actions' dropdown menu.

# 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



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# REPORTS

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# Reports

- Enable Email Reports
- Enter 9-digit cataloging authorization code
- Enter email addresses, separate with semi-colon

**Report Types \***

- ▼ Records Reports
  - ☐ Deleted Records
  - ☐ New Records
  - ☐ Monthly Records
  - ☐ Updated Records
- ▶ WorldCat Holdings Reports
- ▶ Cataloging Partner Reports
- ▶ Data Sync Reports

Settings

Save

▼ Reports

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

**Receive Email Reports** ☒ Yes ☐ No

**Authorization Code \***  ?

**Report Types \***

- ▶ Records Reports
- ▶ WorldCat Holdings Reports
- ▶ Cataloging Partner Reports
- ▶ Data Sync Reports

**Email Address(es) \***  ?

**Report Format** ☒ HTML ☐ Excel

**Receive as** ☒ Email Attachment ☐ Hyperlink



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# BATCHLOAD WITH DATA SYNC COLLECTIONS

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# 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

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# FUTURE DEVELOPMENTS IN FUNCTIONALITIES

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# Unicode

Libraries are able to catalog in any script now.

Collection Manager can output records in any script.


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## გერმანელი მხატვრები და კავკასია / Germaneli mxatvrebi da Kavkasia


Author: გიორგი კალანდიას საერთო რედაქციით = German painters and the Caucasus / general editorship George Kalandia. კალანდია, გიორგი, ; [Giorgi Kalandia](#); [Sak'art'velos t'eatris, musikis, kinosa da k'oreograp'iis saxelmcip'o muzeumi](#).

Publisher: საქართველოს თეატრის მუსიკის კინოსა და ქორეოგრაფიის სახელმწიფო მუზეუმი ხელოვნების სასახლე, [T'bilisi] : [Sak'art'velos t'eatris, musikis, kinosa da k'oreograp'iis saxelmcip'o muzeumi](#) Xelovnebis sasaxle, [2015].


Edition/Format:  Print book : Georgian


Database: WorldCat

Summary: Works by 19th century German painters from collections in the Art Palace, Dadiani Palaces of Zugdidi, the National Museum of Georgia and private collections, including works by Paul von Franken, Ellen Köber, Frederic Frisch, Franz Krüger, Adolf Ladürner, George Wilhelm Timm, Edward House, Adalbert Waagen, Joseph Thomas and Johannes Ludwig Heinrich Moeller.

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

Subjects: [Painting, German -- Georgia \(Republic\) -- Exhibitions.](#)  
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# 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](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](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 13<sup>th</sup>, 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.<sup>SM</sup>**