## OCLC WorldShare Collection Manager quick start guide

Verify preferred OCLC symbol and proxy credentials	1
MARC editing options	4
WorldCat updates	5
Record delivery preferences	6
Reports	6
Search for collections	7
Collection-specific preferences and enabling MARC delivery	9
Downloading MARC files	.11
Additional information	.12
Appendix: Managing WorldCat holdings	.13
Syncing your Knowledge Base holdings with WorldCat	.13
Foregoing records already having your library's holdings set in WorldCat	.14

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 <a href="https://www.oclc.org/forms/col-man-marc.en.html">https://www.oclc.org/forms/col-man-marc.en.html</a>.

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.

WorldShare*											
387	Metadata	Acquisitions	Licenses	Circulation	Interlibrary Loan	Analytics	Admin				
<ul> <li>Record Man</li> <li>Collection M</li> <li>My Files</li> <li>My Apps</li> </ul>	ager lanager										

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

387 Metadata	Acquisitions	Licenses	Circulation	Interlibrary Loan	Analytics	Admin				
Record Manager	Setting	S								
	Save									
Collection 👻	Collection									
2	► Kno	wledge Base	Data							
My Selected Collections	► Wor	ldCat Holding	s							
Search	Prox	<ul> <li>Proxy and Authentication</li> </ul>								
Activity Ilistopy	Prov	Provider Settings								
	Share	▶ Sharing								
Approve Changes to Global Collections	► Wor	WorldCat Discovery								
View Recent Collections	► MAR	MARC Records								
Create a Collection	► Rep	orts								
	► Disp	lay Options								
Settings										

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.

<b>I</b>	87 Metadata	Acquisitions	Licenses	Circulation	Interlibrary Loan	Analytics	Admin			
► Reco	rd Manager	Setting	Is							
- Collec	ction Manager	Save	)							
Collect	ion 👻	+ þci	C Symbol							
My Se	elected Collections	You	r OCLC symbo	ol will be used to rIdCat Registry	maintain WorldCat hold	dings and outp	ut MARC re	cords.		
Activ	ity History ove Changes to	OCL	.C Symbol	◉ OCWM © None	S ()					
View	Recent Collections		uladas Dasa I	D-t-						
Crea	te a Collection	→ Kno → Wor	Knowledge Base Data     WorldCat Holdings							
Setti	ngs	► Prox	ky and Authent	ication						
_		► Prov	/ider 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.

387 Metadata A	cquisitions Licenses	Circulation	Interlibrary Loan	Analytics	Admin					
Record Manager	Settings									
➡ Collection Manager	Save									
Collection -	<ul> <li>OCLC Symbol</li> </ul>									
?	<ul> <li>Knowledge Base</li> </ul>	Data								
My Selected Collections	<ul> <li>WorldCat Holding</li> </ul>	S								
Search	<ul> <li>Proxy and Authent</li> </ul>	ication								
Activity History		Scholar Dow	nload Authentication	Global Access	Open Access in Res	solver				
Approve Changes to Global Collections	Provy									
View Recent Collections	Your proxy-bas	ed URL will be p	repended to any http ca	italog links to dire	ect off-campus users th	rough your pro	xy server. This se	tting can be overri	dden in an individua	al collection's settings.
Create a Collection	Proxy Type	Nor	e	_						
Settings	(	⊚ EZ F ⊚ III W	Proxy /AM Proxy							
My Files	Base URL	http://p	roxy.oclc.org/log							
My Apps	Username		Ü							
	Password									

# **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".

4	387	Metadata	Acqu	isitions	Licenses	Circulation	Interlibrary Loan	Analytics	Admin			
	Record Ma	nager		Settings								
- (	Collection	Manager		Save								
C	Collection 👻			→ OCI	OCLC Symbol							
		?	)	<ul> <li>Knowledge Base Data</li> </ul>								
<b>v</b>	My Selected	Collections		<ul> <li>WorldCat Holdings</li> </ul>								
S	Search				<ul> <li>Proxy and Authentication</li> </ul>							
	Activity His	ston		► Provider Settings								
	Activity file	story		▶ Sharing								
	Approve C Global Col	nanges to lections		► WorldCat Discovery								
	View Rece	ent Collections		► MAF	RC Records	>						
	Create a C	ollection	Ĩ.	▶ Reports								
				<ul> <li>Display Options</li> </ul>								
	Settings											

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.

Activity History	Save
Approve Changes to Global Collections	WorldCat Discovery
View Recent Collections	✓ MARC Records
Create a Collection Settings	Enable MARC Records Delivery
My Files	Customize Records WorldCat Updates Record Delivery
► My Apps	Options for All Collections   Holding Library Code (049 Sa)   MAIN   Delete Fields   Image: Ind 1 ind 2 with the fields

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 <a href="http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/customize-marc-records.en.html">http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/customize-marc-records.en.html</a>.)

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 master 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 master 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 master

record" will reveal sections to "Specify Including Conditions" and "Specify Excluding Conditions".

Customize Records	WorldCat Updates	Record Delivery	
Updates			
Select the option	for WorldCat Update	es.	
None			
Based or	changes to WorldC	at master records	for my knowledge base Standard and WorldCat Query collections
Based or	changes to WorldC	at master records	for my knowledge base Standard and WorldCat Query collections and my WorldCat holdings
Include Wo	orldCat updates for s	pecified OCLC syn	nbols
OCWMS			
Separate e	ach OCLC symbol v	vith a space.	
– Update Conditio	ns		
Define criteria to	determine when you	would like to recei	ve updated records based on changes to the WorldCat master record.
Any change	ge to the WorldCat n	naster record	
Select op	tions for specific cha	anges to the World	Cat master record
Specify Includi	i <b>ng</b> Conditions		
► Specify Exclud	ling Conditions		

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

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 <a href="http://oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/record-delivery.en.html">http://oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/record-delivery.en.html</a>.)

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 <u>orders@oclc.org</u> to obtain one.

Activity History	Settings	
Approve Changes to Global Collections	Save	
View Recent Collections	MARC Records	
Create a Collection	- Reports	
Settings	Sign up to receive reports	for MARC record delivery and/or WorldCat holdings.
My Files	<b>Receive Email Reports</b>	Yes
		© No
My Apps	Authorization Code *	
		33333333
	Report Types	V Deleted Records Report
		New Records Report
		Updated Records Report
		Monthly Records Report
		WorldCat Holdings Report
		Monthly WorldCat Holdings Report
	Email Address(es)*	6
	Report Format	HTMI
		© Excel

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

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 dropdown above the box.)

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

		¢	387	Metadata	Acq								
		► F	Record Ma	nager									
		• (	Collection I	Manager									
		Collection -											
<				?	>								
	<		My Selected	Collections									
	$\langle$	S	earch										
			Activity His	story									
			Approve C Global Coll	hanges to lections									
		-	View Rece	ent Collections									
			Create a C	ollection									
			Settings										
► My Files													
		<b>F</b>	My Apps										

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

For	exa	mple,	searchi	ng on	the coll	lection "el	books	on EE	3SCOhost"	yields this	result	set:
102	207	Manadata	0	Discourse	Classification	Interdition of Lance	Annehutten	Adamia				

Metadata Acqu	lisitions Licenses Circulation Interlibrary Loan Analytics	s Admin					
Record Manager	Search Collections with "ebooks on EBSCOhost"						
✓ Collection Manager	► Filter						
Collection -	Refresh Results 1-25 of 67 Show 25 - rows per page.				<< First <	Previous 1	2 3 <u>Next &gt; Last &gt;&gt;</u>
ebooks on EBSCOhost 🥐	Collection	Provider	Created	In My Holdings	Shared	Shared by	Action
My Selected Collections	€ All EBSCO Audiobooks	eBooks on EBSCOhost	7/24/2012, 3:37:07 PM	Held by my library (4/37,358) Titles Deselect Collection	ବ		Add to Order
Search Collections with "ebooks on EBSCOhost"	All EBSCO eBooks Customizable	eBooks on EBSCOhost	7/24/2012, 12:23:58 PM	Held by my library (5 / 790,041) Titles Deselect Collection	3		Add to Order
Search Collections with      Activity History	China Library Consortium Collection I     Non-Customizable	eBooks on EBSCOhost	7/24/2012, 12:21:08 PM	Held by my library (3,529 / 3,529 ) Titles <u>Deselect Collection</u>	2		Add to Order
Approve Changes to Global Collections	China Library Consortium Collection II     Non-Customizable	eBooks on EBSCOhost	7/24/2012, 12:22:39 PM	Not Held by my library     (073,011) Titles     Select Collection	5		Add to Order
Create a Collection	China Library Consortium Collection III     Non-Customizable	eBooks on EBSCOhost	7/24/2012, 3:50:53 PM	Not Held by my library (0/2,569) Titles Select Collection			Add to Order
Settings My Files	DraconSource Periodicals (Simplified Characters) Customizable : Discontinued	eBooks on EBSCOhost	8/22/2013, 11:14:10 AM	<ul> <li>Not Held by my library (0/0) Titles</li> <li>Select Collection</li> </ul>			Add to Order
► My Apps	Dragon Source Periodicals (Traditional Characters)	aBooke on EBSCOhoet	8/22/2013 11-14-33 AM	Not Held by my library (0/0) Titles			Add to Order

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 <u>both</u> the <i>"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.

<	387	Metadata	Acq		
Record Manager					
<ul> <li>Collection Manager</li> </ul>					
0	ollection	-			
	My Selected Search	Collections ?	•		
	Activity His	story			
	Approve C Global Col	hanges to lections			
	View Rece	ent Collections			
	Create a C	ollection			
	Settings				
•	My Files				
My Apps					

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.

• Record Manager        Collection: All EBSCO eBooks             • Collection Manager        Save          Contribute Changes to Global Collection        Deselect Collection							
✓ Collection Manager           Save         Contribute Changes to Global Collection ▼         Deselect Collection							
Collection    Properties							
ebooks on EBSCOhost ? + Linking	► Linking						
Wy Selected Collections   • Holdings and MARC Records	✓ Holdings and MARC Records						
Search							
Maintain WorldCat Holdings							
Collection: All EBSCO eBooks							
Activity History							
Approve Changes to Data Sources   All approved data sources							
© Selected data sources only							
View Recent Collections     Manual upload only							
Create a Collection							
Settings Export to Coople Scholar							
Disable for this collection							
My Files							
► My Apps							
Enable MARC Record Delivery Use institution setting							
<ul> <li>Disable for this collection</li> </ul>							

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

18) More options will expand.

Delivery Settings         Delivery Frequency         Use institution setting         ③ Specify delivery frequency for this collection         Daily         Subsequent Record Output         ④ Include only records with changes (updated, added or deleted) after initial delivery         ● Include a complete set of records with every delivery         ● Delivery File Output         ● Deliver File Output         ● Deliver records for this collection in the same file as other collections         ● Deliver records for this collection in a separate file         Up to 25 characters, alpha-numeric only.         Interfeave Local Holdings Records         ● Use institution setting         ● Disable for this collection         OCLC Symbols         OCLC Symbols       OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data	Enable MARC Record Delivery	Ose institution setting	
Delivery Frequency       Use institution setting         Specify delivery frequency for this collection         Daily         Subsequent Record Output         Include only records with changes (updated, added or deleted) after initial delivery         Include a complete set of records with every delivery         Delivery File Output         Delivery File Output         Deliver records for this collection in the same file as other collections         Deliver records for this collection in a separate file         Up to 25 characters, alpha-numeric only.         Interleave Local Holdings Records         Disable for this collection         Embed Local Bibliographic Data         OCLC Symbols       OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data         Use institution setting		Delivery Settings	
Interleave Local Holdings Records       Interleave Local Bibliographic Data         OCLC Symbols       OCLC Symbols		Delivery Frequency	Use institution setting
Subsequent Record Output <ul> <li>Include only records with changes (updated, added or deleted) after initial delivery</li> <li>Include a complete set of records with every delivery</li> <li>Include a complete set of records with every delivery</li> <li>Delivery File Output</li> <li>Deliver records for this collection in the same file as other collections</li> <li>Deliver records for this collection in a separate file</li> <li>Up to 25 characters, alpha-numeric only.</li> </ul> Interleave Local Holdings Records <ul> <li>Use institution setting</li> <li>Disable for this collection</li> <li>Use institution setting</li> <li>Disable for this collection</li> <li>Ocluc Symbols</li> <li>Ocluc Symbols for which to include Local Holdings Records and / or Local Bibliographic Data</li> <li>Use institution setting</li> </ul>			Specify delivery frequency for this collection     Daliv
<ul> <li>Include a complete set of records with every delivery</li> <li>Delivery File Output</li> <li>Deliver records for this collection in the same file as other collections</li> <li>Deliver records for this collection in a separate file</li> <li>Up to 25 characters, alpha-numeric only.</li> <li>Interleave Local Holdings Records</li> <li>Use institution setting</li> <li>Disable for this collection</li> <li>With to include Local Bibliographic Data</li> <li>OCLC Symbols</li> <li>OCLC Symbols for which to include Local Holdings Records and / or Local Bibliographic Data</li> </ul>		Subsequent Record Output	Include only records with changes (updated, added or deleted) after initial delivery
Delivery File Output <ul> <li>Deliver records for this collection in the same file as other collections</li> <li>Deliver records for this collection in a separate file</li> <li>Durbuiction</li> <li>Oclubic symbols</li> <li>Oclubic symbols for which to include Local Holdings Records and / or Local Bibliographic Data</li> <li>Use institution setting</li> </ul>			Include a complete set of records with every delivery
Deliver records for this collection in a separate file     Deliver records for this collection in a separate file     Deliver records for this collection     Deliver records for this collection     Deliver records for this collection     Occar Bibliographic     Deta     Occlc Symbols     Occlc Symbols for which to include Local Holdings Records and / or Local Bibliographic Data     Occle Symbols for which to include Local Holdings Records and / or Local Bibliographic Data     Occle Symbols		Delivery File Output	$\odot$ Deliver records for this collection in the same file as other collections
Interleave Local Holdings Records       Interleave Local Holdings Records         Interleave Local Holdings Records       Image: Constitution setting Disable for this collection         Embed Local Bibliographic Data       Image: Constitution setting Disable for this collection         OCLC Symbols       OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data Image: Use institution setting			Oeliver records for this collection in a separate file
Up to 25 characters, alpha-numeric only.         Interleave Local Holdings Records       Interleave Local Holdings Records         Disable for this collection         Embed Local Bibliographic Data       Is use institution setting Disable for this collection         OCLC Symbols       OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data Is use institution setting			
Interleave Local Holdings Records Bended Local Bibliographic Data OCLC Symbols OCLC Symbols for which to include Local Holdings Records and / or Local Bibliographic Data OUSe institution setting OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data OUSe institution setting			Up to 25 characters, alpha-numeric only.
Construction       Image: Construction         Embed Local Bibliographic Data       Image: Construction setting         Oclc Symbols       Oclc Symbols for which to include Local Holdings Records and / or Local Bibliographic Data         Image: Oclc Symbols       Oclc Symbols for which to include Local Holdings Records and / or Local Bibliographic Data		Interleave Local Holdings Records	Our Use institution setting
Embed Local Bibliographic Data       Image: Construction setting         Image: Construction Construction       Disable for this collection         Image: Construction Construction       OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data         Image: Construction Construction       OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data         Image: Construction Setting       Image: Construction Setting			O Disable for this collection
Oclc Symbols       Oclc Symbols for which to include Local Holdings Records and / or Local Bibliographic Data         Image: Content of the symbols of the symbols of the symbols for which to include Local Holdings Records and / or Local Bibliographic Data         Image: Content of the symbols of the symbols of the symbols for the symbol		Embed Local Bibliographic	Our Use institution setting
OCLC symbols OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data <ul> <li>Use institution setting</li> </ul>		Data	O Disable for this collection
		OCLC Symbols	OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data <ul> <li>Use institution setting</li> </ul>
OCLC symbols specified for this collection			$\odot$ OCLC symbols specified for this collection

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:

Delivery File Output	$\ensuremath{}$ Deliver records for this collection in the same file as	other collections
	Oeliver records for this collection in a separate file	
EBSCODDA		
	Up to 25 characters, alpha-numeric only.	

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.



✓ 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		Download
metacoll.DXU.new.20140428.T104526.1.mrc	Collection Manager	10 KB	04/28/2014		Download

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 <a href="http://www.oclc.org/support/services/collection-manager/documentation/service-specific-specifi

#### settings/MARC-settings/record-retrieval-ftp.en.html).

## Additional information

Additional documentation may be found on OCLC's website at http://www.oclc.org/support/services/collection-manager/documentation/service-specificsettings/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 <u>http://www.oclc.org/support/services/collection-manager.en.html#officehours</u>

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

To change or reset your WorldShare password please see the instructions at: <a href="http://www.oclc.org/content/dam/support/worldshare-metadata/password.pdf">http://www.oclc.org/content/dam/support/worldshare-metadata/password.pdf</a>

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.

387 Metadata	Acquisitions	Licenses	Circulation	Interlibrary Loan	Analytics	Admin		
Record Manager	Settin	Settings						
<ul> <li>Collection Manager</li> </ul>	Save	Save						
Collection -	► OC	OCLC Symbol						
?	→ Kno	<ul> <li>Knowledge Base Data</li> </ul>						
Wy Selected Collections	Voi Wai	WorldCat Holdings Maintain WorldCat holdings for knowledge base titles.						
Activity History	Mai	Maintain Holdings						
Approve Changes to Global Collections View Recent Collections		_	© No					
Create a Collection		Proxy and Authentication						
	→ Pro	vider Settings						
Settings	▶ Sha	► 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
	© Yes
	No

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