

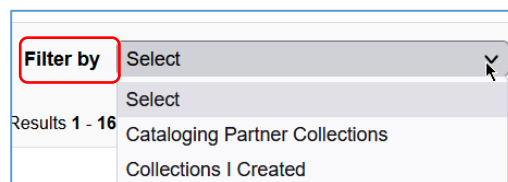
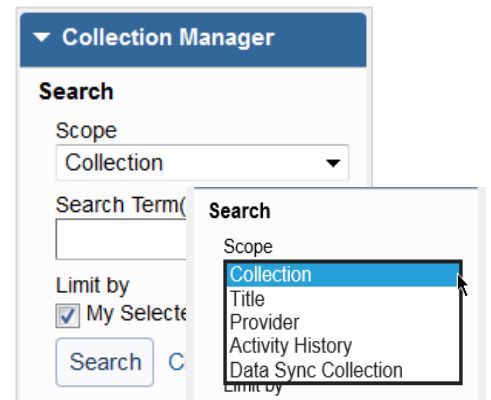
Use KBART files to edit WorldCat knowledge base collections

Class Handout

Search for collections, providers, or titles

Depending on the information that you have about your materials, you can search for collection, for provider, or for title

- Click **Collection Manager**
- Under Scope, select:
 - **Collection**
 - **Title**
 - Can search OCLC number, ISBN number of the title, or ISSN of the title
 - **Provider**
 - Activity History
 - Data Sync Collection
- Option to leave the search box empty and limit search by using “My Selected Collections”
- Limit by “My Selected Collections”
- If selected, the search will return results with your library’s collections
- If not selected, the search will return results from the global WorldCat knowledge base and any collections your library has created.
- Use **Filter by...** to refine search results



Select and edit knowledge base collections with KBART file

1. Download KBART file

- Under the collection search results, click the desired collection to open it
- Click **Collection Actions** menu
- Select **Download titles in this Collection**
Scope = **Available titles in collection, OR My Selected Titles**

- Click **Download**
- Save file to edit later or open file to edit in a spreadsheet program

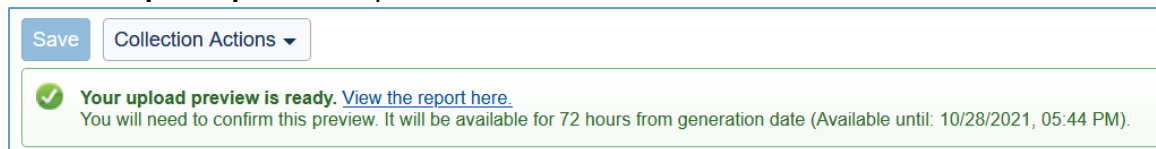
2. Edit titles in a spreadsheet program (*preferably EXCEL*)

- Global vs. Local edits
 - **Global** changes made to a global field are applicable to all libraries (e.g., Title Name)
 - **Local** changes made to a local field are only applicable to the editing library (e.g., coverage information)
 - More information about global vs. local fields can be found here: [Edit global collections and titles](#)
- Edit and delete titles to match your library-specific purchase or subscription
- Save file as a **tab-delimited** text file

3. Upload KBART file

In the desired collection:

- Click **Collection Actions** menu
- Select **Upload Titles to this Collection**
 - Scope = **Update changes only**, *OR* **Replace all titles in collection**
- Click **Browse** button and locate the file to upload
- Click **Upload**
 - You will see this message: **Upload is being processed**
- View the **upload preview** report



- **Approve** or **Discard** upload

Add new knowledge base collections with KBART file

1: Create a new local collection

Under Collection Manager:

- Click **Create a Collection**
- Select **Knowledge Base Collection**
- Click **Create**

New collection screen displays (Required fields marked with red asterisk (*))

- **Properties** accordion
 - Enter a **Collection name**

- Use or change **Collection ID** (Note: needs to be unique)
- Search for an existing **Provider** or **Create a Provider**
- **Linking** accordion
 - Enter **Collection URL** as appropriate
 - **Link scheme** – OCLC can create a link scheme for new knowledge base collection and add it here. Provide OCLC Support (support@oclc.org) with the following information:
 - Collection name, Collection ID, and Provider
 - Sample search from current provider to full-text
 - Username and password
- Click **Create** to add new collection

2: Add titles to a new collection with a KBART file

- **Create** a collection of titles in spreadsheet program. Each row contains information for one title
 - a) Add title using KBART formatting (*see section below*)
 - b) Use appropriate value in the ACTION field for each title:

| Values | Description |
|-----------------|--|
| raw | Use to tell the system that the title is added for the first time |
| autofill | Use the OCLC number to find the WorldCat record and populate title |

- c) Save KBART file as a **tab-delimited text (.txt)** file type
- **Upload** KBART file of titles
 - a) Select **Metadata**
 - b) Expand **Collection Manager**
 - c) **Search** for the desired collection
 - d) Navigate to the collection screen
 - e) Click **Collection Actions** menu
 - f) Select **Upload Titles to this Collection**
Scope = **Update changes only**, *OR* **Replace all titles in collection**
 - g) Click **Browse** button and locate the file to upload
 - h) Click **Upload**
 - i) You will see this message: **Upload is being processed**
 - j) View the **upload preview** report

Save
Collection Actions ▾

✔ **Your upload preview is ready.** [View the report here.](#)
 You will need to confirm this preview. It will be available for 72 hours from generation date (Available until: 10/28/2021, 05:44 PM).

- k) **Approve** or **Discard** upload

- **KBART file formatting**

- Electronic serials

| Recommended values | Description of values |
|-------------------------|--|
| publication_title | Title of journal |
| title_url | URL for journal title |
| coverage_depth | Extent of coverage for journal title (full text, abstract, etc.) |
| print_identifier | ISSN for journal title |
| online_identifier | eISSN for journal title |
| oclc_entry_id | Title ID for each title in the collection |
| oclc_number | OCLC accession number, if available |
| date_first_issue_online | Start of coverage range for journal title |
| num_first_vol_online | |
| num_first_issue_online | |
| date_last_issue | End of coverage range. Leave blank if coverage is still ongoing |
| num_last_vol_online | |
| num_last_issue_online | |
| ACTION | Use "raw" value to indicate data is added for the first time |

- Electronic books

| Recommended values | Description of values |
|-------------------------|--|
| publication_title | Title of journal |
| title_url | URL for journal title |
| coverage_depth | Extent of coverage for journal title (full text, abstract, etc.) |
| print_identifier | ISSN for journal title |
| oclc_entry_id | Title ID for each title in the collection |
| online_identifier | eISSN for journal title |
| oclc_number | OCLC accession number, if available |
| date_first_issue_online | Start of coverage range for journal title |
| num_first_vol_online | |
| num_first_issue_online | |
| date_last_issue | |

| | |
|-----------------------|---|
| num_last_vol_online | End of coverage range. Leave blank if coverage is still ongoing |
| num_last_issue_online | |
| ACTION | Use “raw” value to indicate data is added for the first time |

- Print serials

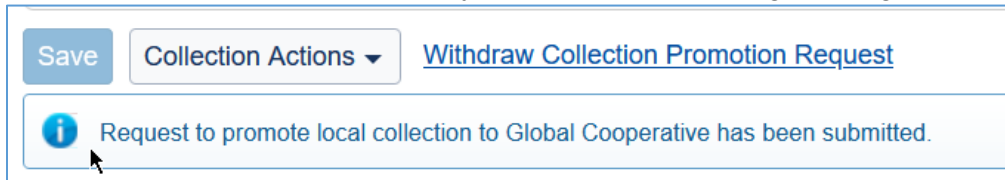
| Recommended values | Description of values |
|-------------------------|---|
| publication_title | Title of journal |
| title_url | URL for journal title |
| coverage_depth | Use “print” or “other” to |
| print_identifier | ISSN for journal title |
| oclc_entry_id | Title ID for each title in the collection |
| online_identifier | eISSN for journal title |
| oclc_number | OCLC accession number, if available |
| date_first_issue_online | Start of coverage range for journal title |
| num_first_vol_online | |
| num_first_issue_online | |
| date_last_issue | End of coverage range. Leave blank if coverage is still ongoing |
| num_last_vol_online | |
| num_last_issue_online | |
| ACTION | Use “raw” value to indicate data is added for the first time |

Promote local knowledge base collections

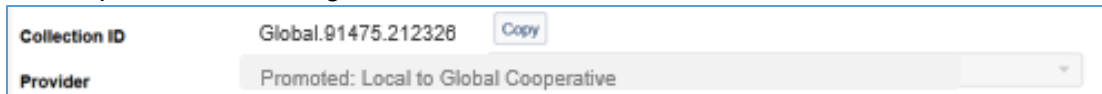
Libraries can opt to promote a locally created collection the global WorldCat knowledge base.

To promote a locally created collection:

- Under **Collection Manager**, search for the collection
- In the collection results screen, open the desired collection
- Click **Collection Actions** menu
- Select **Promote Collection to Global Knowledge Base**
- Provide a **summary of changes**. Click **Continue**
- Once request has been submitted, you will see the following message:



- Once the request is accepted and the collection promoted to a global collection, the collection ID and provider will change to:



Delete knowledge base collection and/or titles

6: Remove holdings from knowledge base collections

Depending on the changes with your library's electronic resources subscriptions, you may need to periodically remove holdings from an entire collection or individual selected titles in a collection.

To **Delete** an entire collection your library created:

- Under **Collection Manager**, search for the collection
- Search results screen displays
 - Identify the chosen collection
 - Under **Selections**, click **Delete**

To **Delete** individual titles in a locally-created collection:

- Under **Collection Manager**, search for the collection
- Search results screen displays
 - Identify the chosen collection
 - Click the collection name to display collection
 - Search for your chosen title(s)
 - Under **Selections**, click **Delete Title**

Support and Resources

Community

- **Community Center**
<http://www.oclc.org/community/home.en.html>

Support & Training

- **Documentation**
[WorldShare Collection Manager](#)
- **Training** (includes instructor-led sessions, recordings, tutorials)
[WorldShare Collection Manager](#)

Office Hours

- Via **WebEx** (no registration required)
- Details for access code and call-in numbers: [Office hours](#)

Contact Customer Support

- **United States:** 1-800-848-5800 or support@oclc.org
- In **your region:** <http://www.oclc.org/support/contact-support.en.html>