

Collection Manager

# WorldShare® Collection Manager: What it is and how libraries use it

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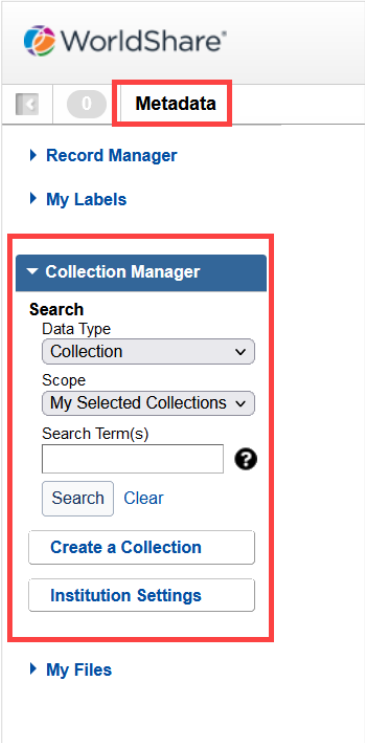


# Agenda

- WorldShare Collection Manager
  - What is it?
  - How libraries use it?
- Collection Manager interface
- Types of collections
- MARC records and WorldCat holdings
- Help and support options

# What is Collection Manager?

- Manage metadata for electronic and print materials
- Output WorldCat records
  - Custom record editing options
  - Custom delivery options
  - Automatic updates
- Maintain holdings in WorldCat
- Request form: <http://oc.lc/getCM>



WorldShare®

Metadata

Record Manager

My Labels

Collection Manager

**Search**

Data Type  
Collection

Scope  
My Selected Collections

Search Term(s)

Search Clear

Create a Collection

Institution Settings

My Files

# How libraries use Collection Manager?

- Help users find your resources
- Improve local catalog quality
- Get new print materials into circulation
- Manage your electronic resources
- Save time maintaining collections

# Typical workflow

**Library**  
sets up for  
all collections

Set  
OCLC  
symbol

Enable  
MARC  
record

Enable  
WorldCat  
holdings

Sign up  
for  
reports

**Library and/or  
provider**  
maintains as  
needed for each  
collection

Create  
collections  
&  
settings

## Automated process

Maintain  
WorldCat  
holdings

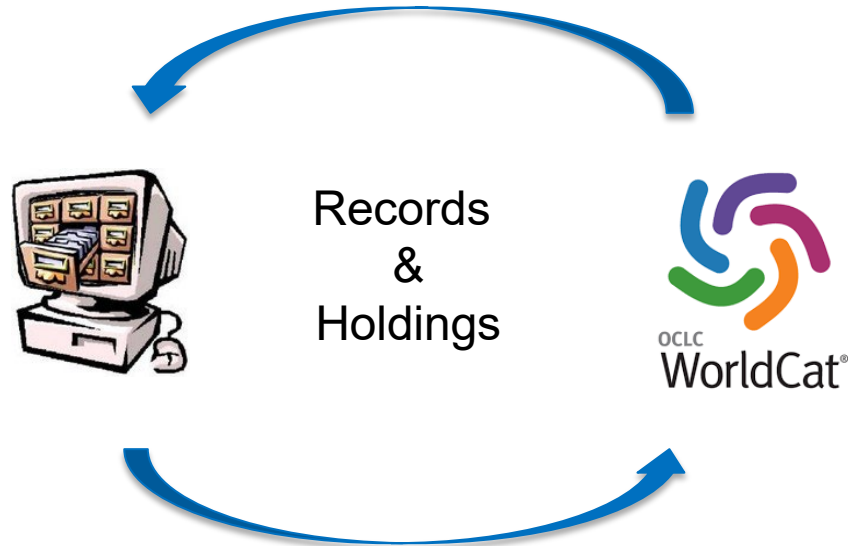
Provide  
reports

Deliver  
WorldCat  
records

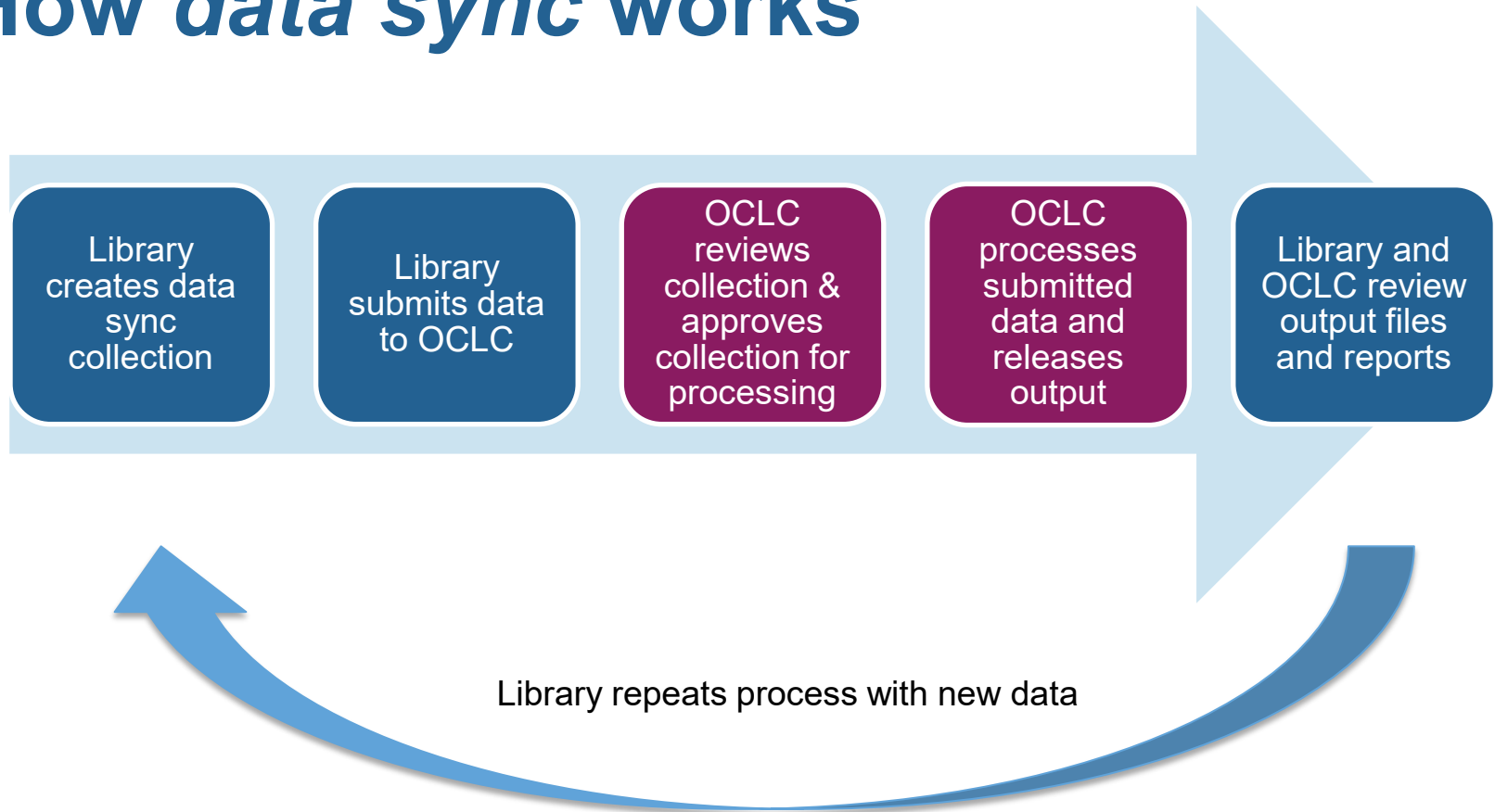


# WorldCat data sync

Synchronize data in a library's local catalog with WorldCat



# How *data sync* works





# WorldCat query

Identify and download records based on WorldCat search indexes



```
010 76382000
040 DLC $c DLC $d MUQ $d NLGGC $d BTCTA
020 9780333176238 0291 NLGGC $b 76031103X
050 00
082 0
049
100 1 020 9780333176238 0291 NLGGC $b 76031103X
245 1
050 00 010 76382000
082 00 040 DLC $c DLC $d MUQ $d NLGGC $d BTCTA
049 020 9780333176238 0291 NLGGC $b 76031103X
260
100 1 050 00 HD 010 76382000
245 14 082 00 33 040 DLC $c DLC $d MUQ $d NLGGC $d BTCTA
049 T 020 9780333176238 0291 NLGGC $b 76031103X
100 1 Evans, Douglas.
260 050 00 HD9502.A2 $b E92
300 082 00 333.7
504 I 260
049 TAWA
100 1 Evans, Douglas.
245 14 The politics of energy. $b the emergence of
the superstate / $c Douglas Evans.
260 London. $b MacMillan, $c 1976.
300 ix, 155 p. ; $c 23 cm.
504 Includes bibliographical references and index.
```

# How *WorldCat* query works

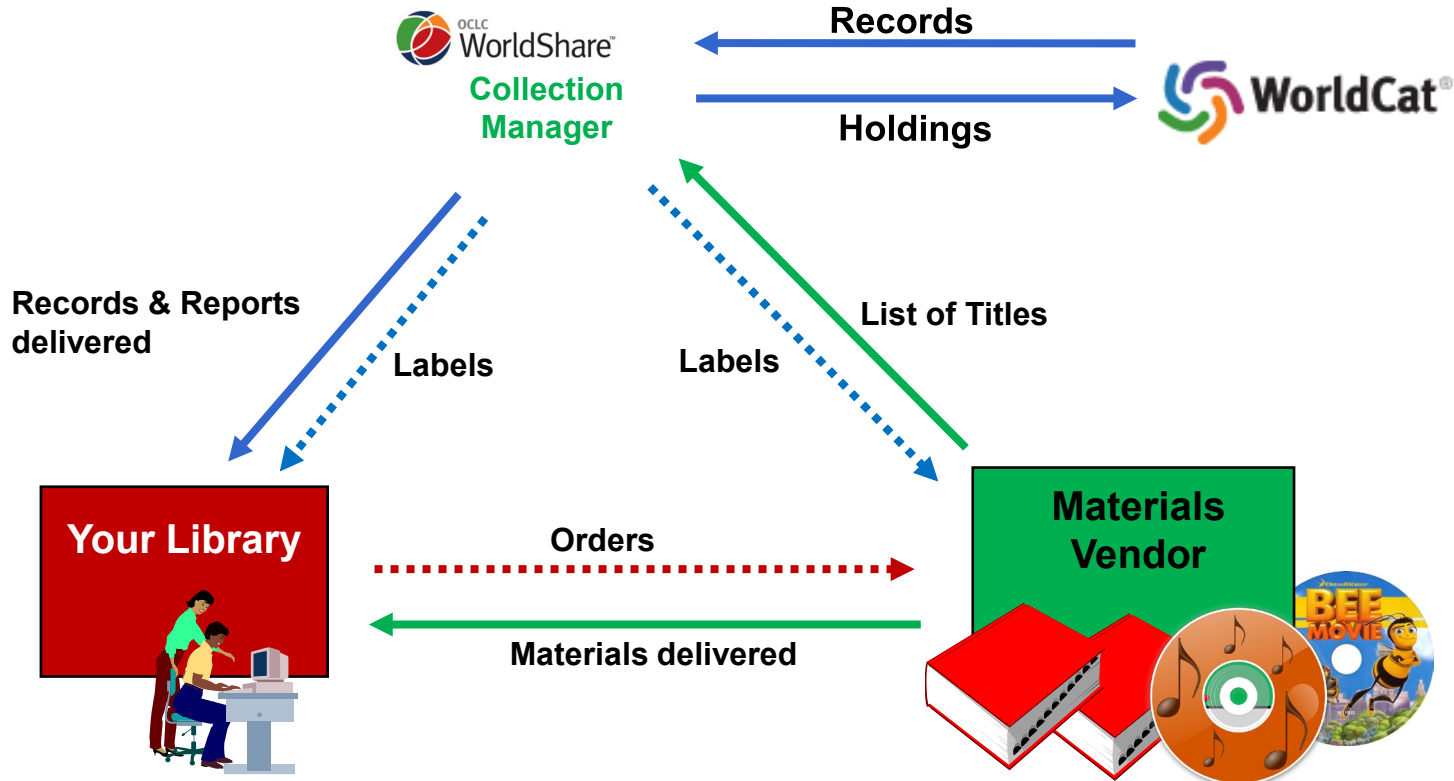


# WorldCat cataloging partner

- Improve cataloging efficiency
- Libraries' holdings information added to WorldCat
- Libraries receive customized records for materials



# How cataloging partner works



# WorldCat knowledge base

Combines data about your library's electronic resources to make your collections easier to find, share, manage and use.



## Find

Easy access to e-resources in search results, Open URL link resolution, and A-Z journal list

## Share

Quick and easy sharing of your electronic content

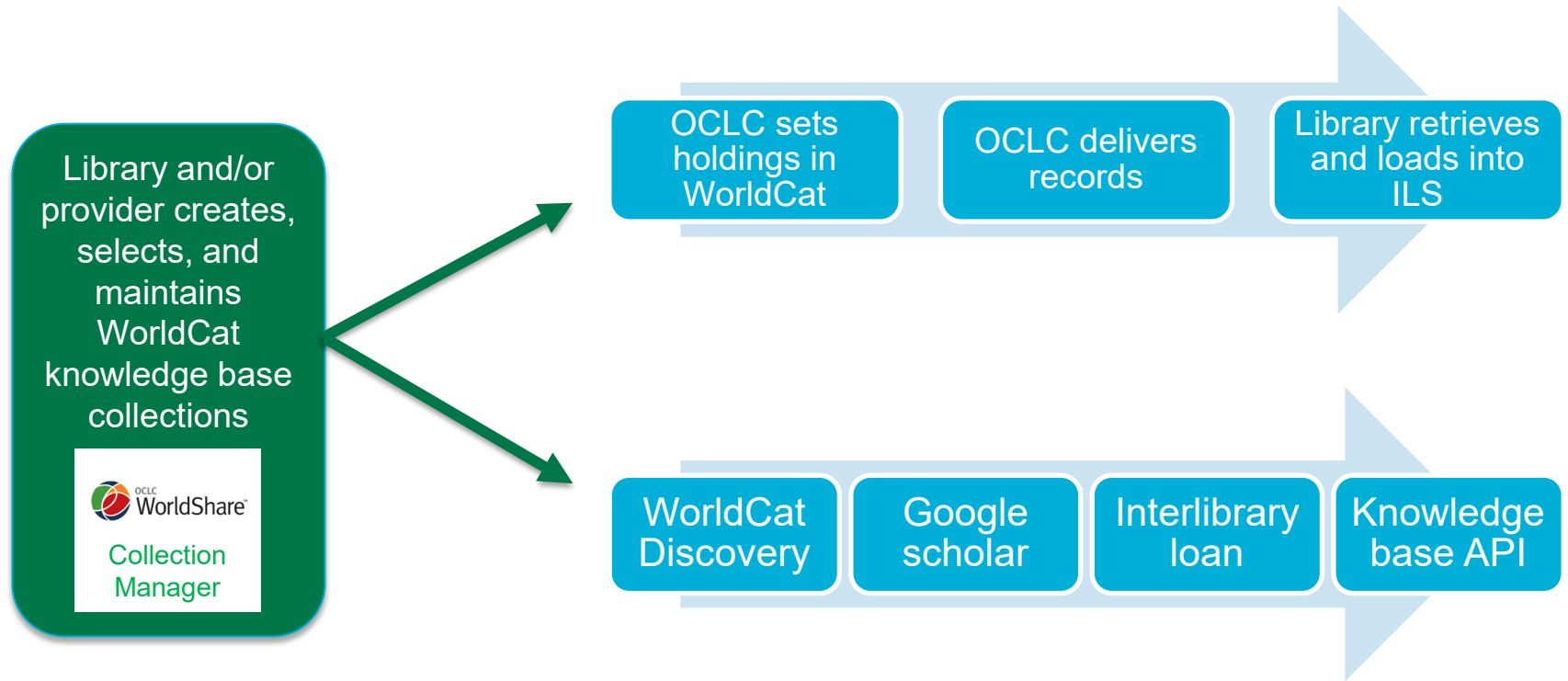
## Manage

Manage budgeting, ordering and acquisition of electronic resources

## Use

Rights management, usage statistics and link resolution of electronic materials

# How *knowledge base* works



# WorldCat updates

Save time maintaining your library collections



Updated WorldCat record

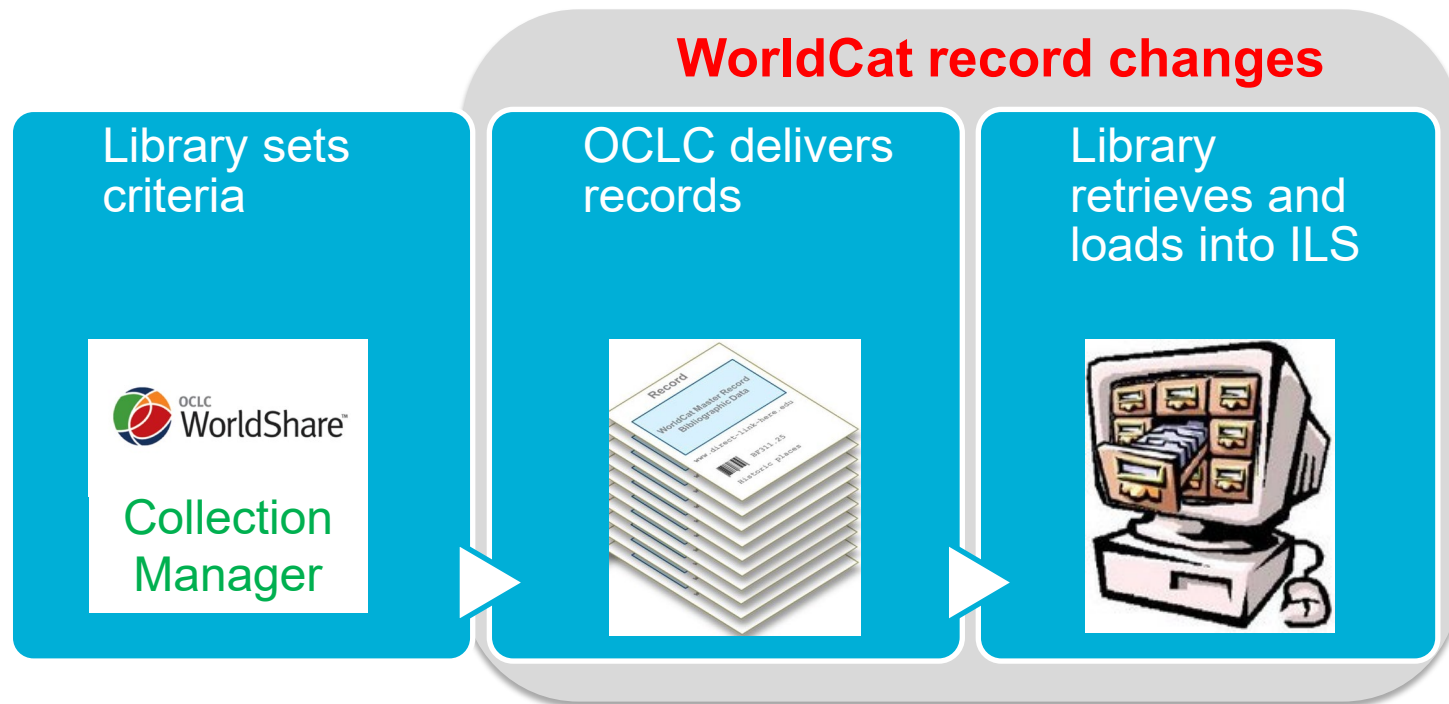
```
010 76382000
040 DLC #c DLC #d MIO #d NLCCC #d BTCTA
020 978033 03X
050 00 HD9502
082 00 333.7
049 T@WA
100 1 Evans,
245 14 The po argence of
the su
260 London
300 ix, 15
504 Includes bibliographical references and index.
```

**NEW**

Updated record in your ILS



# How *WorldCat* updates works







# WorldCat holdings

0 Metadata Acquisitions Licenses Circulation Interlibrary Loan Analytics Admin

Record Manager  
My Labels

Collection Manager

Search  
Data Type  
Collection  
Scope  
My Selected Collections  
Search Term(s)  
Search Clear  
Create a Collection  
Institution Settings  
My Files

Institution Settings

Save

OCLC Symbol  
Knowledge Base Data

WorldCat Holdings  
Maintain WorldCat holdings for knowledge base and cataloging partner titles.

Maintain Holdings  Yes  No

Proxy and Authentication  
Provider Settings  
WorldCat Discovery  
MARC Records  
Reports  
Display Options

Select **YES** to have WorldCat holdings maintained

# MARC records

Metadata Acquisitions Licenses Circulation Interlibrary Loan Analytics Admin

Record Manager My Labels

Collection Manager

Search  
Data Type: Collection  
Scope: My Selected Collections  
Search Term(s):  
Search Clear  
Create a Collection  
Institution Settings  
My Files

Institution Settings

Save

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ WorldCat Discovery
- ▼ MARC Records
  - Enable MARC Records Delivery  Yes  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.

\* Required field

All Collections  
Holding Library Code (045) MAIN ?  
Sa)

Delete Fields  
Tag Ind 1 Any Ind 2 Any

Delete Subfields  
Tag 650 Ind 1 Any Ind 2 Any Subfield

Add Fields  
Tag Ind 1 Ind 2 Subfield  
Value Enter Free Form Text

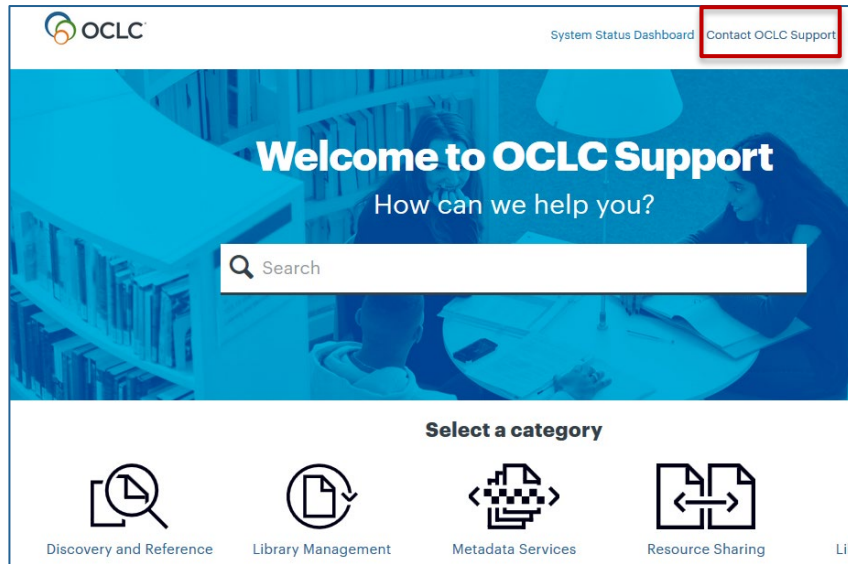
Choose **YES** to begin customizing MARC records options for **ALL** collections

Training video: [MARC records for all collections](#)

# Questions?

Contact OCLC Support in your region

<https://help.oclc.org>



1-800-848-5800



# Thank You!

Please remember to fill out the evaluation for this class

- Instructor: Mindy Tran
- Category: Cataloging and Metadata
- Class name: WorldShare Collection Manager: What it is and how libraries use it

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)