OCLC will use your Federal Depository Library Program (FDLP) profile information to create and maintain knowledge base collections in Collection Manager for your government document titles.

**Get started**

If you need access to Collection Manager (the Metadata tab in the WorldShare interface), follow the steps to Create a Collection Manager account. The instructions will tell you to complete a Request WorldShare Collection Manager form.

An OCLC Cataloging and Metadata Subscription is required for record delivery from the collections listed below. If your library does not have a subscription, see Options for libraries without a cataloging subscription.

**Request collection loading**

**Verify that your collections have not been manually selected**

If your institution has manually selected a collection or titles in a collection, OCLC will not overwrite your selections. Before the initial load of holdings from your provider, we recommend that you verify that the collection has not been manually selected.

Before the initial load of your collections, please:

1. Sign in to the WorldShare interface at your library's WorldShare URL https://yourlibrary.share.worldcat.org/wms [Replace yourlibrary with your library’s identifier].
2. Navigate to Metadata > Collection Manager and locate the search box.
3. Uncheck My Selected Collections and search for the collection.
4. Once you have returned the collection in a search, perform one of the following:
   - **If the collection is selected in FULL**: You will need to deselect it. Our system will not be able to overwrite the collection with the title data directly from your provider. If you have holdings set in WorldCat, deselecting the collection will remove these holdings. Holdings will be added after OCLC loads the collection (if WorldCat Holdings is enabled in Institution Settings)
   - **If the collection is partially selected to reflect a subset of the titles available in the collections**: The system will overwrite your title selections and collection data. If you want to preserve the title selections and collection data before OCLC overwrites it, do so before making a request for your collection to be loaded by OCLC. Within your collection, navigate to Titles > More Actions. Use the option to Download titles in local holdings and choose a format to download a spreadsheet of your title data.
If the collection is NOT selected: Proceed to the instructions How to request automated collection loading

Contact OCLC Support

1. OCLC will use your Federal Depository Library Program (FDLP) profile information to maintain your library-specific government document collections. If you are not sure what your GPO depository number is, please contact the Government Printing Office (GPO) support team: https://www.gpo.gov/askgpo

2. Contact OCLC Support and provide your U.S. Government Printing Office details to have automated holdings feeds enabled by sending the following sentence:

   Please create my library-specific government document collections in Collection Manager:
   My WorldCat registry ID is: [number]
   My GPO depository number is: [number]

It can take up to one month before your government document collections are active and viewable in the WorldShare interface.

See if your collection loaded

Collection names and IDs

There are many collections in the global WorldCat knowledge base. Use the collection information to help you find the relevant collections. When you search in Collection Manager, try entering a root word and an asterisk (*) as a truncation operator. For example: U.S. Government*

<table>
<thead>
<tr>
<th>COLLECTION NAME(S)</th>
<th>COLLECTION ID(S)</th>
<th>DEMAND-DRIVEN ACQUISITION COLLECTIONS?</th>
<th>FREQUENCY PROVIDER SENDS OCLC DATA</th>
<th>NOTES ABOUT THE COLLECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>U.S. Government Documents - Electronic</td>
<td>govdocs.govdocs@No</td>
<td>No</td>
<td>Monthly</td>
<td>Please verify that your collections have not been manually selected before you proceed to request collection loading.</td>
</tr>
<tr>
<td>U.S. Government Documents - Non-electronic</td>
<td>govdocs.govdocs@No</td>
<td>No</td>
<td>Monthly</td>
<td>Please verify that your collections have not been manually selected before you proceed to request collection loading.</td>
</tr>
</tbody>
</table>

OCLC has divided your titles into two collections: Electronic titles and non-electronic titles. This division allows you to make choices in your settings and customizations per format. For example, you can choose to have MARC records for your electronic collection and for your non-electronic titles output in unique, separate files. Likewise, you could add unique public notes for display in WorldCat Discovery in each collection.
Check the Activity History or search for your collection

We recommend that you wait until your collection is available before you proceed so that all of the settings will be available in Collection Manager.

The amount of time it takes for your titles to be available depends on the timing of your request, how often your provider sends data, when OCLC's loads the data, and the place of your institution's data in a queue. The time for the initial loading process varies from about one week to one month.

To see if your collection has loaded in the WorldShare interface:

1. Sign in to the WorldShare interface at your library’s WorldShare URL (https://yourlibrary.share.worldcat.org/wms [Replace yourlibrary with your library’s identifier]).
2. Navigate to Metadata > Collection Manager. Do one of the following:
   ◦ Navigate to the Activity History and look at the history for your provider. See About the Activity History in Collection Manager for help
   ◦ Search for the collection

Configure institution settings

1. Sign in to the WorldShare interface at your library’s WorldShare URL.
   ◦ Replace yourlibrary with your library’s identifier: https://yourlibrary.share.worldcat.org/wms
2. Navigate to Metadata > Collection Manager > Institution Settings.
3. Configure the following settings:

OCLC Symbol

Verify that your OCLC Symbol is selected

Use the OCLC Symbol setting to verify that your institution’s OCLC symbol is selected. Collection Manager uses the symbol displayed here to maintain WorldCat holdings and to output records.

To verify that your OCLC symbol is selected:

1. Navigate to Institution Settings > OCLC Symbol.
2. Select your OCLC symbol if it is available in the interface but is not selected.
   If your OCLC symbol is not available in the interface, follow the instructions to edit your information in the WorldCat registry.
3. Click Save.

Edit your information in the registry

Collection Manager uses information your institution’s WorldCat registry profile. You can quickly review your institution’s information by visiting the WorldCat registry website.

To edit your information in the WorldCat registry:

1. Sign out of WorldShare Collection Manager.
2. Sign in to OCLC Service Configuration. Navigate to the WorldCat registry module and select Identifiers. Update your information and save your changes. Sign out.

3. Sign in to WorldShare Collection Manager.

4. Click the Refresh from WorldCat Registry button, preview the changes, and click Accept changes. Click Save.

Proxy and Authentication

**Enter your proxy information so off-campus patrons are directed through a proxy server**

Collection Manager helps you manage patron access to materials by directing off-campus patrons through your proxy server. Collection Manager will prepend your proxy information to catalog links. Both on-campus and off-campus patrons will be given proxy links. Consult the documentation for your proxy server to determine how to configure your proxy settings to ignore on-campus patrons so they do not have to sign in.

You can override proxy information for a single collection within a collection’s collection-level settings. See Collection-level settings in knowledge base collections.

**Proxy Type**

1. Navigate to Institution Settings > Proxy and authentication > Proxy.
2. Select Proxy:
   - None (default)
   - EZproxy
   - III WAM Proxy

**Base URL**

- EZproxy users:
  - Enter your Base URL. Example of a EZproxy base URL: http://ezproxy.oclc.org/login?url=
- III WAM Proxy users:
  - Enter the Hostname. Example of a III WAM Proxy hostname: sys.lib.proxy.edu

Caution: Do not include a space after the Base URL.

**Username and Password**

(Optional) Enter your Username and Password. Providing username and password information is used by OCLC for de-bugging purposes only.

**Reports (WorldCat holdings reports and/or Records reports)**

**Enable emailed reports**

If you enable reports in Institution Settings > Reports, reports will be available via email around the time when files of records have been output and/or after there are changes to your holdings in WorldCat. When
your first report is available, you will get an email from Usage_Statistics@oclc.org with the subject field: "The report [name of report] you requested for [YYYYMMDD]."

You will not receive an email on days when there is no activity. Reports are also available in the OCLC Usage Statistics Portal and they are identical to the reports that come by email. See how to access reports in the OCLC Usage Statistics Portal.

To receive emailed reports:

1. Navigate to Institution Settings > Reports.
2. Select Yes to Receive Email Reports.
3. Enter your cataloging authorization or an admin code. This is a 9-digit number starting with 100. Only one authorization code is needed per institution.
4. Expand and select the Report Types you want to receive.
   - To find details about the content of each report type see Understand emailed reports.
5. Enter the Email Address(es) the reports will be sent to. If you are adding more than one email address, separate each email address with a semi-colon (;).
7. Click Save.

There is not a way to select only certain reports per email. The email address(es) entered will receive all selected reports.

Many libraries that have collections that output records on an ongoing basis select the Updated Records report. The report will notify you of critical changes like OCLC number merges and the reason you received an updated record even if you have not enabled WorldCat updates.

Choose the instructions that apply to your needs

**Get WorldCat MARC records**

**Enable record delivery in Settings**

Collection Manager will output new, update, and delete records as they become available based on your GPO class selection holdings. To enable your institution for MARC record delivery:

1. Navigate to Collection Manager > Institution Settings.
2. Expand MARC Records. Select Yes to enable record options.
3. Complete the settings in the tabs to customize your records as much or as little as desired. For complete instructions, see Configure institution MARC Records settings for knowledge base collections.

**Enable record delivery in each collection**

1. Search for your collection using the search box in Metadata tab > Collection Manager.
2. Click the name of one of the collection to open it.
3. Open the **Holdings and MARC Records** accordion.

4. Set **Enable MARC Record Delivery** to **Use institution setting**.

5. (Optional) Consider using these popular settings:

**Deliver records for this collection in a separate file**

You have the option to have your file of records delivered in a separate file from other collections.

1. After you set **Enable MARC Record Delivery** to **Use institution setting**, click on the **Record Delivery** tab.

2. Change the **Delivery File Output** setting to Delivery records for this collection in a separate file.

3. Assign a file name. If you want more than one collection in the same separate file, enter the same file name in both collections. For example, enter "Gov Docs" as the file name within two different government document collections.

**Do not include records already held in WorldCat**

You have the option to forgo receiving new records for those titles you have already set holdings on in WorldCat. In other words, you can choose to only receive new records for those titles that you do not yet hold in WorldCat.

By default, the Record Output setting "Include records already held in WorldCat" is selected. You must change the setting to forgo receiving new records for those titles you have already set holdings on in WorldCat.

1. After you set **Enable MARC Record Delivery** to **Use institution setting**, click on the **Record Delivery** tab.

2. Change the **Record Output** setting to **Do not include records already held in WorldCat**.

**Download your records**

Download your files of records from the WorldShare interface, Metadata tab.

- See [Download files in My Files](#)

Find information to [Understand emailed reports](#) and [Understand record processing](#).

**Manage WorldCat holdings**

Collection Manager provides the convenience of automatically maintaining your holdings in WorldCat as titles are added, deleted or updated in your collections.

1. Navigate to **Institution Settings > WorldCat Holdings**.

2. Set Maintain holdings in WorldCat to **Yes**.
   
   Now that you have enabled WorldCat Holdings in the institution settings, the collection-level setting for knowledge base collections will be enabled by default.
Use collection data with other services

Display full-text links, elevate links from a specific provider, and more.

• See Use collection data with other services

Find additional support materials

For help, visit us in Collection Manager office hours. Find additional information to Understand emailed reports and Understand record processing.

Browse Frequently asked questions such as:

• Who do I contact to stop an automated holdings feed to my knowledge base collection?
• How are DDA collections automatically maintained?
• Why am I missing records?