Learn how to use the Activity History screen in WorldShare Collection Manager for knowledge base collections, query collections, and cataloging partner collections.

**Enable the staff names setting**

An institution-level setting allows you to see the name of the staff member that made changes to a knowledge base, query, or cataloging partner collection in Collection Manager. The setting is for use with your institution's activity and collection-level histories and is for internal tracking purposes only.

To find the setting:

1. Navigate to **Institution Settings**.
2. Expand the **Display Options** accordion.
3. Leave the setting unselected or select **Display Staff Members**:
   a. By default, this setting is unselected and your institution's name appears both inside and outside your institution as the Source for collection and title changes.
   b. If you select this setting, the First and Last Name of staff members will appear to your institution as the Source. Your institution will continue to appear outside your institution. Names are those entered in the WorldShare Admin tab.

Note: If an OCLC staff member makes a change for you in response to an OCLC Support request, you will see OCLC, Online Computer Library Center or the staff member's name, even though you will not see an account for them in the WorldShare Admin tab. If you have concerns, please contact OCLC Support.

**Activity and collection history per collection type**

For more information about activity history per collection type, please see:

- Knowledge base collection Activity History
- Collection History in Query collections
- Collection History in Cataloging partner collections

**Steps for common workflows**

Below are some examples of how to use the Collection Manager Activity History. Use the activities tracked in the Activity History with title-level title histories in a title's or collection's **Title History** accordion. Each collection also has a **Collection History** accordion.
Use the Provider filter

For global, provider-supplied knowledge base collections updated by OCLC with data from a provider, use the Activity History to see if the collections you subscribe to from a provider have been updated.

Follow these steps

1. Choose **Activity History** as the Data Type. Leave the search box blank. Select **My Institution History's** as the Scope. Click **Search**.
2. At the top of the screen, select the **Provider** filter and use the drop-down menu to find and choose the Provider Name.
3. Click **Filter**.

Use the Activity Date & Collection Activity filters

To verify that you deselected or deleted a set of collections that are no longer needed, use the Activity History to see the collections you deselected or deleted during a specific date range.

Follow these steps

1. Choose **Activity History** as the Data Type. Leave the search box blank. Select **My Institution History's** as the Scope. Click **Search**.
2. At the top of the screen, select the **Activity Date** filter and enter the date range in the From and To fields.
3. Add a row by using the green (+) add icon.
4. Select the **Collection Activity** filter and choose either **Collection Deselected** or **Collection Deleted** from the drop-down menu that appears.
5. Click **Filter**.

See edits in a title's Title History

After you or another institution edits a global field in a title and applies the edits, changes will be tracked in the title's Title History. Visit a title's Title History or use the collection's Title History accordion to see the changes that you or other institutions made and see the previous data.

Follow these steps

1. Navigate to the title and open it. Expand the **Title History** accordion.
2. Filter by **Edits - Global**. Changes listed as **Edits - Local** are changes that only your library sees.

Find a Provider Data Load and understand when you will see two activities per load

When OCLC updates knowledge base collections with global data from a provider, you will see a Provider Data Load activity in the main Activity History.

Follow these steps

1. Choose **Activity History** as the Data Type. Leave the search box blank. Select **My Institution History's** to see Provider Data Loads only for collections you have already selected. Click **Search**.

https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Collection_Manager_Activity_History/Us…
Printed: Sun, 01 Jan 2023 06:09:43 GMT
2. At the top of the screen, select the **Loads & Feeds** filter and then choose the **Provider Data Load** filter from the drop-down menu that appears.
   - If you would like to further filter the results to a specific provider:
     - Add a row by using the green (+) **add icon**.
     - Select the **Provider** filter and then use the drop-down menu that appears to find and select the Provider Name.

3. If you have enabled the collection-level **autosubscribe** setting to have new titles selected automatically if a provider adds them, you will see two activities for one data load. When global titles are added and those titles are selected for your library, you will see two activities in the Activity History:
   - One for global data changes, the titles added
   - One for titles selected, the titles the system selected for your library as a result of the **autosubscribe** setting being enabled in the collection**

**Note: This functionality differs from Provider Holdings Feeds where title additions are typically based on new purchases. Rather, this functionality applies when you bought a collection as a whole and the provider is adding a new title to the package.**

**Find a Provider Holdings Feed and the associated Provider Data Load**

For a knowledge base collection updated by an automatic feed, use the Activity History to verify that a provider holdings feed has loaded. There will be an associated Provider Data Load that precedes the Provider Holdings Feed.

**Follow these steps**

1. Choose **Activity History** as the Data Type. Leave the search box blank. Select **My Institution History's** as the Scope. Click **Search**.

2. At the top of the screen, select the **Loads & Feeds** filter and then choose the **Provider Holdings Feed** filter from the drop-down menu that appears.

3. You can add another load type. Again, select the **Loads & Feeds** filter and then choose the **Provider Data Load** so that both are selected in the drop-down menu.
   - If you would like to further filter the results to a specific provider:
     - Add a row by using the green (+) **add icon**.
     - Select the **Provider** filter and then use the drop-down menu that appears to find and select the Provider Name.

4. Click **Filter**.

Provider holdings feeds are preceded, typically by 1-3 days, by an associated provider data load. To surface both activities, there are a number of ways you can search. Use the instructions above or you can search by the Collection ID, by the Provider Name listed as the Update Source, and so forth.

**Find a KBART Upload activity and understand when you will see two activities per upload**

After a KBART file is uploaded and applied to a collection, use the Activity History to see the data changes and find a detailed report about how each title was processed.

**Follow these steps**

A. To see what changed in title data:
1. Choose Activity History as the Data Type. Leave the search box blank. Select My Institution History's as the Scope. Click Search.

2. At the top of the screen, select the Loads & Feeds filter and then choose the KBART Upload filter from the drop-down menu that appears.

3. Click Filter.

4. In your search results, click on the KBART Upload of interest.
   - If you uploaded a KBART file to a global knowledge base collection and the file included selections and edits to local fields AND it included edits to global fields, you will see two activities listed for the upload. One will only be viewable to your library. The other will contain global edits and other libraries will see the activity in their Activity Histories and your institution name will show as the source.

5. Click on Title Changes to see the updated and previous data for titles that changed and to see if the change was applied locally or globally.

   B. To find details about how each title was processed:
      1. Follow the steps above and then click the Download Detailed Report button.
      2. The detailed report will appear similar to a KBART file. A RESULT column will list a value for each title describing the way each title was processed or stating why processing was invalid.

The collection's Collection History accordion will list the date and time the KBART file was uploaded.

Title changes will be incorporated into each title's Title History.