Create a Collection Manager account

Last updated: Tue, 07 May 2019 20:11:34 GMT

Find instructions to create a Collection Manager account and to manage additional staff accounts.

Choose your set of instructions

The steps to create a WorldShare Collection Manager account (the Metadata tab in the WorldShare interface) differ depending on whether or not you have an OCLC Cataloging Subscription. Please follow the relevant instructions. If you need help, contact OCLC Support.

Option 1: I have an OCLC Cataloging Subscription

Record delivery is included in the value of an OCLC Cataloging Subscription. If you have a CatExpress subscription, new records output via Collection Manager will count against your total record budget for your CatExpress subscription. However, MARC records delivered for OCLC cataloged collections will not count against your CatExpress total record budget. Updated records for titles/OCLC numbers that were previously delivered will not be billed. For more information, please see Use Collection Manager with a CatExpress subscription.

1. Create an account

Complete the request form

Complete the request form only if you need to. If no one at your institution has previously submitted the request form:

• Complete the WorldShare Collection Manager request form so that OCLC will provision your institution for Collection Manager (the Metadata tab). You will receive notification from OCLC Order Services when your institution has been provisioned. After you receive notification, proceed to the next step.

If someone at your institution has access to Collection Manager or has previously submitted the request form:

• Your institution has already been provisioned. Please proceed to the next step to create your individual credentials.

2. Create, edit, or delete additional staff accounts

To create additional staff accounts:

• Navigate to the WorldShare interface > Admin tab. See the documentation on User management for more information.

To edit or delete an account:

1. Navigate to the WorldShare interface > Admin tab.
2. See the documentation on User management for more information.

Option 2: I do not have an OCLC Cataloging Subscription

If your library does not have an OCLC Cataloging Subscription, you can request access for records for content from one of OCLC's provider partners. Access to Collection Manager is provided for the exclusive purpose of receiving records for content from select providers. Collection Manager has many features. However, because your access to Collection Manager is for an exclusive purpose, some functionality will not be available.

1. Create an account (for libraries without a subscription)

a. Request access to Collection Manager

1. Visit the WorldShare Collection Manager request form and complete the form.
2. In the Comments or Questions field, indicate your provider or your reason for the request. For example: "I am a Wiley customer." This will indicate to OCLC that your library needs to be configured for an exclusive purpose and should not be charged for an OCLC Cataloging and Metadata Subscription.

b. Set a password

1. Look for an email from Order Services. Order Services will email you a welcome message that includes:
   - Your institution's unique WorldShare URL
   - Your personal user name
   - A 9-digit "admin" authorization number to use when you sign up for emailed record reports
2. Follow the instructions to Set or reset your password.

2. Create, edit, or delete additional staff accounts

How to create additional staff accounts:

1. Navigate to the WorldShare interface > Admin tab.
2. See documentation on User management for more information.

How to edit or delete an account:

1. Navigate to the WorldShare interface > Admin tab.
2. See documentation on User management for more information.