Collection-level settings in knowledge base collections

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Find a list and descriptions of the collection-level settings you will see when you create a knowledge base collection.

Properties

Local / Global Toggle

These buttons toggle the view between the user’s local copy of the collection and the global version of the collection. The local view shows any changes from the global collection that users have made. The global view shows the state of the collection as maintained by the knowledge base or the parent institution (in the case of shared collections). The global view is non-editable.

Collection Name

This is a required field. The corresponding column in the KBART file is "oclc_collection_name." Collection names may include special characters; however, users should keep in mind that searching for names with special characters might not work since some special characters in the search field are reserved for commands.

Provider

The provider, publisher, or aggregator of the collection.

When you create a knowledge base collection, you have the option to complete the Provider field. If your provider is not already in the WorldCat knowledge base, you can create a custom provider so that the provider will be available in your local knowledge base. Your custom provider (for example, "My University") will be searchable content in Collection Manager. You will be able to sort this provider among the other WorldCat knowledge base providers when you elevate links from a specific provider for WorldCat Discovery.

Collection ID

This is a required field and must contain a unique value. The corresponding KBART file column is "oclc_collection_id."

When you create a knowledge base collection, the system automatically suggests the next consecutive, unique value. However, you can edit the value to one that has not been used before. You can reuse a Collection ID, but only if it is no longer being used for a collection.

All locally created/private collections must have a Collection ID that:
The Collection ID for every collection must be unique to you even if you share/accept a shared collection. If you accept a shared collection with a specific Collection ID, for example, `ebl.ebooks`, you cannot also have a local collection with that ID. Thus, consortia often create collections they wish to share as local/private collections and use the format in the example above for the Collection ID.

**Data Version**

This field shows the data release number corresponding to the most recent global WorldCat knowledge base data updates.

**Last Updated**

This field shows a time stamp indicating when either the user or the global data update last updated the collection in any way. In the local view, the time stamp will reflect changes made by users. In the global view, the time stamp will reflect the last time OCLC loaded data to that collection.

**Description**

Use this field to add a basic description of the collection for internal reference. It only displays in the knowledge base interface.

**Notes**

You can add a collection-level note in Collection Manager for public display and/or for display only in the collection when viewed in the WorldShare interface for staff.

Note: Public and staff collection-level notes have a 1024 character limit.

**Public:**

Use this field to create notes you want exposed to patrons.

- These notes will be displayed in your WorldCat Discovery A-Z list. The metadata will not show when a patron performs a search to find the item. See Create a link to your A to Z list (optional).
- OCLC's OpenURL link resolver application references this field.
- You have the option in Collection Manager to output records and to customize the records to include your collection-level note in the 740$a or in any field/subfield you desire. To map the collection-level note to your records, map the value Collection Level Data - Public Note in the Customize Records tab.
- License Manager libraries can create a template to manage collection-level notes in an automated way.

**Staff:**

Use this field for private notes that you want to be restricted to staff responsible for managing your collections. These...
notes will not be visible publicly and will only display in the Collection Manager interface.

**When Sharing (Customizable / Non-customizable)**

When creating a new collection via the "Create a Collection" button in Collection Manager, you will see settings to choose if you what the collection you are creating to be Customizable or Non-customizable.

This setting **can only be set at the time of creation**. Note that you will **not** be able to edit this selection once the collection is created.

<table>
<thead>
<tr>
<th>Sharing</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Libraries can select individual titles (Customizable)</td>
</tr>
<tr>
<td>☐ Libraries can only select the entire collection (Non-customizable)</td>
</tr>
</tbody>
</table>

See [Customizable and non-customizable knowledge collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_world_share_manager) to help you decide which setting to choose and for instructions to include required data when you add titles to your Customizable collection.

**Collection Type**

These are settings used to define the type of collection and are sometimes used by the system for filtering.

- **Customizable:**
  
  This collection type appears for some knowledge base collections. It indicates that the collection's titles can be edited. Customizable collections can be selected in part or as a whole whereas non-customizable collections can only be selected as a whole.
  
  For more information, see [Customizable and non-customizable knowledge base collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_world_share_manager).

- **Demand Driven Acquisition:**

  This collection type indicates that the collection is part of a Demand Driven Acquisitions program where OCLC is working with a feed from the provider to automatically update the collection metadata. See the [Providers and contacts for automatic collection loading](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_world_share_manager) to initiate automatic loading page for more information. You may also use this setting to describe local collections you create.

- **Discontinued:**

  This collection type indicates that the collection is no longer being actively maintained or updated by knowledge base data updates. Collections are discontinued for a number of reasons, most often because the provider has indicated that the collection is no longer being updated or made available to users in the form described by the knowledge base collection. Some examples of this include when a platform change occurs or when duplicate collections exist because of other provider changes.

- **Document Delivery:**

  This demarcation indicates whether the collection is available for user with your library’s document delivery program.
You can select this demarcation to describe locally made custom collections.

- **Open Access:**

This collection type defines whether or not the collection is an open access collection. This is a type that users may use to describe locally made, custom collections (that are not part of the global WorldCat knowledge base).

For more information on how to add open access collections see [Add open access content](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workspaces).

- **When sharing libraries can select individual titles:**

This description specifies whether or not libraries can select individual titles from a shared/accepted collection. For more information on sharing, see [Share knowledge base collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workspaces).

**Linking**

**Collection URL Formula (Collection URL)**

This field represents a link to a representation of the collection from the vendor. It is also a calculated field that adds proxy information to your proxy configuration. For more information, see [Proxy and Authentication](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workspaces).

**Calculated Collection Link (Calculated Link)**

This field displays the collection URL calculated using the collection URL formula and information from your proxy configuration.

See the [Proxy and Authentication](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workspaces) for more information.

**Title Link Formula (Link Formula)**

This field is used to construct title level links when a provider does not provide direct title links in their KB data or if the provider requires a provider or library specific setting in their URL.

This field may pull information from other KB settings such as proxy configuration, provider-specific settings, link scheme, database linking keys, linking keys, journal linking keys, or override fields.

**Sample Title Link (Calculated Link)**

This field displays a sample title URL calculated using the title link formula including information from other setting fields.

**Database Linking Key**

This field is used to include a database identifier (given to a user by the provider) in links, when the provider requires that a link indicate which collection a library has turned on. This key may be used in title-level links and/or article-level links.
Link Scheme

This value instructs how the application creates article links for a particular record or set of records. It corresponds to the oclc_linkscheme column in the KBART file.

The link scheme value is represented in collection-level settings.

Libraries can override the link scheme value in the title-level settings. For detailed instructions see Link scheme values and overrides.

Provider setting or linking ID

This field is only visible in collections from providers that require linking IDs. In other words, it only appears in collections from providers listed in Institution Settings > Provider Settings. The field in your collection uses the name your provider uses for the ID. It will be called a Library ID, Customer ID, or something else.

Collections from certain providers require library-specific linking IDs assigned by the provider in order for links to resolve to full-text. If, for a specific collection from a provider, you need to override the linking ID you have at the institutional level, enter it in this field.

Find more information about Provider Settings.

Example situation for entering an override ID is this field:

A library has access both to a library-specific collection and to a consortial version of a collection that is shared with their knowledge base. They are using their library-specific linking ID in Institution Settings > Provider Settings. Within the consortial collection, they have overridden that ID by entering the ID for the consortial collection within the collection-level settings. Links from items from either collection will resolve correctly:

Example 1:

http://[ID from Provider Settings].provider.com/patron/FullRecord.aspx?p=[12345]


Example 2:

https://eboookcentral.proquest.com/lib/[ID from Provider Settings].detail.action?docID=[6789]


Use Proxy

By default, collections will use the proxy information you have included at the institution level. If you need to override the proxy settings for a specific collection, use the settings under Use Proxy.

Leave the default setting or select an alternative setting:
Use institutional setting (default)

If this setting is selected, you will see your current institutional setting listed (Proxy is set for EZproxy, Proxy is set for III WAM proxy, or No proxy is set) along with a link to the settings in Institution Settings > Proxy and Authentication:

Override for this collection

Choose this setting if you wish to override the institution setting for this collection. Select your proxy service and enter your information.

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.

No proxy needed

Choose this setting within a collection if you want the system to generate links for your discovery interface and/or for MARC records without your proxy information.

OPAC Linking

This setting is available only in locally created collections (custom collections that you create). It allows you to choose how you want to enter links for your print serials.

- Manual (default) - Choosing Manual will allow you to enter a URL for each title in your knowledge base. By default this is set to Manual for local collections
- From WorldCat Registry - Choosing From WorldCat registry will automatically create URLs based on the Online Public Access Catalog (OPAC) information entered for your library in OCLC Service Configuration, WorldCat Registry > Online Catalog

If you are going to promote your local collection to a global collection so that it can be cooperatively managed, leave "Manual" selected. Once the collection becomes a global collection, the setting will no longer be available. If "From WorldCat Registry" is selected at that time, libraries that select the global collection will be unable to change it to "Manual."

Holdings and MARC Records
Maintain WorldCat Holdings

WorldCat holdings must be enabled in the institution settings in order for the collection-level setting to maintain WorldCat holdings to appear. For information on how to enable holdings at the institution level, see WorldCat Holdings.

Options:

• Use institution setting (default)*
• Disable for this collection

*Open-access collections are disabled by default.

Data Sources

About

This setting affects library-specific automated collection feeds and third-party holdings file uploads to your WorldCat knowledge base. It does not affect regular knowledge base updates.

You have the following options for Data Sources in both the institution settings and in the collection-level settings:

• All approved data sources (default)
• Selected data sources only
  ◦ If you select this, data sources appear so you can select or deselect them
• Manual upload only

In most situations, OCLC recommends that you leave the default settings selected. Altering the Data Sources settings can interfere with updates from DDA partners and other holdings providers. Libraries typically alter Data Sources settings only when discontinuing particular loading services.

Collection-level Data Sources settings

Note: Data Sources settings are not available within locally created collections. Likewise, some shared collections with automated holdings feeds might not have Data Sources settings because, depending on how OCLC set up the automated feed, some shared consortial collections behave like locally created collections.

Use collection-level Data Sources settings to discontinue a feed in one or more collections.

Follow these steps:

I. Make sure the default setting is selected in the institution settings:

  1. Navigate to Institution Settings > Knowledge Base Data > Data Sources.
  2. Make sure the default institution setting, All approved data sources, is selected.

II. Configure collection-level settings:
3. Use the search box within Collection Manager to search for and navigate to the collection.

4. Open the collection and expand Holdings and MARC records.

5. For Data Sources, the default collection-level setting is All approved data sources. Change the setting depending on your desired action:
   - If multiple data sources are populating a collection and you want to disable one or more while preserving others, choose Selected data sources only. A list of data sources will appear. Uncheck the options you do not want to populate the collection.
   - If you want to prevent any data source from populating a collection, choose Manual upload only.

Caution: Do not deselect the collections. A collection must be in place for this setting to work, even if it has 0 titles. Thus, before removing the collection in its entirety by deselecting it, you must use the Data Sources setting to ensure the feed and the metadata moving through OCLC's system does not populate the collection. You can deselect the collection at a later time.

III. Notify OCLC Support:

6. If you are discontinuing a feed, contact OCLC Support to let us know you do not want the automated feed. For example:

OCLC Support,

Please stop the automated holdings feed for my knowledge base collection in Collection Manager.

   • Collection Name and/or Collection ID:
   • My institution's registry ID or WorldShare URL:

Thank you.

Institution Data Sources settings

Use the institution Data Sources settings to prevent a data source from populating any collection in your knowledge base. Libraries rarely change institution Data Sources settings; Use the collection-level Data Sources settings to discontinue automated holdings feeds.

Follow these steps:

1. Navigate to Institution Settings > Knowledge Base Data > Data Sources.

2. The default institution setting is All approved data sources. Change the default setting depending on your desired action:
   - If multiple data sources are populating various collections across ALL collections and you want to disable one or more while preserving others, choose Selected data sources only. The list of options will be all the data sources that have been populating collections. Uncheck the options you do not want to populate the collection.
   - If you want to prevent all data sources from any of your collections, choose Manual Uploads Only.

3. If you are discontinuing a feed, contact OCLC Support to let us know you do not want the automated feed.
ILL allowed & Instructions

For use by WorldShare Interlibrary Loan (WSILL) libraries without a License Manager subscription.

You have the following options for Ill allowed:

- Yes
- No (default)

If you select yes, choose lending instructions from the instructions drop-down list.

If you select no, see How to deflect lending requests (knowledge base collections) for details on setting up a deflection policy based on this setting.

https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_wor…
This feature is only visible to Collection Manager users without access to WorldShare License Manager.

**Export to Google Scholar**

See our [Google Scholar](#) page for information related to both institution and collection-level settings.

**Enable MARC Record Delivery**

Caution: The collection-level MARC record delivery options will not be available until you enable MARC record delivery in the institution settings.

- Use institution setting: Your institution settings will be displayed here
- Disable for this collection (default)

After you enable record delivery in the collection, you will see the following tabs of settings:

- Customize Records
- Record Delivery

**Customize Records**

**Local Bibliographic Data**

Leave the default setting or override institution settings for LBD. Settings:

- Use institution setting (default)
- Disable for this collection

**Local Holdings Records**

Leave the default setting or override institution settings for LHRs. Settings:

- Use institution setting (default)
- Disable for this collection

**OCLC Symbols (for LHRs and local bibliographic data)**

Leave the default setting or override the OCLC symbols you included at the institution level for LHRs and/or Local Bibliographic Data. Settings:

- Use institution setting (default)
- Use these OCLC symbols for LHRs and local bibliographic data
MARC Custom Text

If you mapped custom text to your records in the Customize Records tab, add collection-level text in the corresponding field(s).

If desired, use the Define Custom Text Labels button to change the text label from "Custom Text 1" to something more meaningful. See Collection Custom Text for more information.

Record Delivery

Delivery Frequency

Leave the default setting or override the institution setting for Delivery Frequency. Settings:

- Use institution setting (default)
- Specify delivery frequency for this collection. Settings:
  - Daily (default)
  - Weekly
  - Monthly
  - Quarterly

If the same item/OCLC number is in multiple collections and the collections are set to different delivery frequencies, you could get the same record multiple times.

Subsequent Record Output

Change the default setting if you want a complete set of records with every delivery. Settings:

- Include only records with changes (updated, added or deleted) after initial delivery (default)
  - This setting is selected by default. After your first delivery of records, you will receive new, updated, and delete records that reflect changes to titles and collection data.
- Include a complete set of records with every delivery
  - This setting is available for libraries that would like to receive both records with changes and records for titles that have not changed each time records are delivered.
    - Records will be received in New, Updates, and Deletes files. Records for titles/OCLC numbers that have previously been delivered will appear in an Updates file with each delivery, even if there were no changes.
to the records. A separate file of new records will include titles added to collections that have not previously been delivered via WorldShare Collection Manager. Additionally, a separate file of deleted records may also be delivered for titles to which you no longer have access.

- Please see the Criteria for new, update, and delete records for additional information.

**Delivery File Output**

You have the option to have records output in a separate file. By default, all records will be output in the same files (New, Updates, and Deletes files) along with records from other collections. Settings:

- Deliver records for this collection in the same file as other collections (default)
- Deliver records for this collection in a separate file

**Have records delivered in a separate file**

1. Navigate to the collection and expand the **Holdings and MARC Records** accordion.
2. In the **Record Delivery** tab, find the **Delivery File Output** settings and select **Deliver records for this collection in a separate file**.
3. Enter for the collection a file name of up to 25 alphanumeric characters.
4. Note that you have the option to **group records from multiple collections** for output in a separate file by entering the same file name in the collections.
5. By default, **Isolate this file output from other collection activity** is unselected. Leave the setting **unselected** unless one of the following statements is true for you. See the "Isolate file output from other collection activity" below for more information:
   - Your ILS requires that records for electronic resources contain a single URL even when a title is available in multiple collections
   - You are using query collections in Collection Manager to manage MARC records for a consortium

Collection Manager will output the records from the collection in a separate file and include the file name you entered between the time stamp and the file extension. Example where [XXX] represents your library symbol:

https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_wor…

Printed: Wed, 24 Jun 2020 11:07:19 GMT
Group records from multiple collections

You have the option to group records from more than one collection in the same file by entering the same file name in each collection.

For example, if you have a DDA collection and a purchased collection, you could enter the file name "DDAandPurchased" within both collections and records from those two collections would be output together in the same files.

<table>
<thead>
<tr>
<th>COLLECTIONS TO BE OUTPUT IN SEPARATE FILES</th>
<th>FILE NAME YOU ENTER WHEN YOU NAME THE SEPARATE FILE</th>
<th>SEPARATE FILES AND FILE NAMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection 1</td>
<td>DDA collection</td>
<td>DDAandPurchased</td>
</tr>
<tr>
<td>Collection 2</td>
<td>Purchased collection</td>
<td>DDAandPurchased</td>
</tr>
<tr>
<td>Collection 3</td>
<td>Science e-collection</td>
<td>VendorCollections</td>
</tr>
<tr>
<td>Collection 4</td>
<td>Technology e-collection</td>
<td>VendorCollections</td>
</tr>
<tr>
<td>Collection 5</td>
<td>Engineering e-collection</td>
<td>VendorCollections</td>
</tr>
</tbody>
</table>

You will get a single file separate from files for your other collections. The file will contain records from both collections. Records/titles within the file will be distinguishable by collection name, collection ID, and collection notes or custom text (if you chose to map notes or custom text to your records).

Isolate file output from other collection activity

The setting to isolate file output from other collections is associated with how Collection Manager processes data for a record in relation to record data in items from other collections. The option is available in knowledge base collections in Collection Manager and in query collections with ongoing delivery in Collection Manager.

When to select the option in knowledge base collections

Select the isolate file option if your ILS requires a separate record with a single URL for every instance of an electronic title. In other words, select the option to isolate the collection if you want records to only contain the URL from their collection even though you might have the title in multiple knowledge base collections in Collection Manager.

By default (with this setting unselected), Collection Manager will deliver multiple URLs in a single record for a knowledge base title.

To find the setting to isolate the file output:
1. Navigate to the collection and to **Holdings and MARC Records > Record Delivery > Delivery File Output.**
2. Select the option to Deliver records for this collection in a separate file and enter a file name.

**When to select the option in query collections**

Select the isolate file option if you are using query collections in Collection Manager to output records for multiple libraries with unique WorldCat holding symbols. If you are from a consortia with multiple query collections set up to output records based on holdings for each institution, you can select the option to isolate your collections so that when a single library adds or deletes a holding in WorldCat, a New or Delete record will be delivered based on the activity of a single collection.

By default (with this setting unselected), Collection Manager will deliver an Update record when a library deletes a holding if there are other collections for libraries have holdings set on the item. Collection Manager will deliver a Delete record only when a holding is removed from a library and no other libraries have holdings set on the item.

**To find the setting to isolate the file output:**

1. Navigate to the collection and to **MARC Records > Record Delivery > Delivery File Output.**
2. Select the option to Deliver records for this collection in a separate file and enter a file name.

You have the option to [Group records from multiple collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_holdings) for output in a separate file by entering the same file name in the collections.

**WorldCat Holdings**

This setting acts as a filter to filter out from record delivery titles that you have set holdings on through some process outside of Collection Manager.

By default you will receive a **full set of records** for the titles in the collection. Your initial batch of records will have a record for every title. The default setting is:

- Include new records already held in WorldCat (default)

If you do **not** want records for items you already have holdings on in WorldCat, you can choose to have those titles withheld from record delivery. Change the setting to **Do not include records already held in WorldCat** and you will only receive records that do not already have your holding attached in WorldCat.

Note: If you choose not to have records output for titles you already hold in WorldCat, we recommend that you change this setting back to "Include new records already held in WorldCat" after you receive your first delivery.

**Sharing**

See instructions on how to [Share knowledge base collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_holdings) with other libraries.
**Titles**

This accordion displays a list of titles within the collection that users have selected. To find the list of title-level settings, please see [Title-level settings in knowledge base collections](#) and/or the documentation on how to [Modify a collection to select your subset of titles](#) for more information.

**More Actions**

![More Actions dropdown](#)

**Download**

In the Titles accordion, expand the More Actions drop-list to select **Download** to download a KBART file.

**Choose a download Scope**

1. In the Download Collection File box, choose the **Scope** of your file:
   - **Titles in local holdings**
     If you have selected titles in the collection, you will see the scope "Titles in local holdings." If you choose the "Titles in local holdings" scope, your file will contain only your selected and/or modified titles. Choose this option if:
       - You are downloading title data for a subset of titles you have already selected
   - **Available titles in collection**
     If you have not selected any titles in the collection, the scope "Available titles in collection" will be the only option displayed. If you choose the "Available titles in collection" scope, your file will contain the complete title data from the global knowledge base collection and can be used to select the desired titles for your library's local holdings. Choose this option if:
       - You want to download title data for all of the titles available in the collection
2. Leave the Download type as "KBART."

Note: We recommend that libraries choose "Titles in local holdings" when making changes to a collection you have already modified. We also recommend preserving a version of your KBART file before making any changes. If an error occurs when attempting to modify or to upload your collection, this file can be used to return your collection to the prior state.

Note: If you have selected a collection in full (via the Select Collection/Add to Order button), both of the scope options will provide the same content.

Choose a download File encoding

1. Leave the default File encoding UTF-8 unless you need to change it. If your collection data includes Non-Latin/Non-Roman characters, use the File encoding drop-down list to change the default selection to UTF-16LE (Unicode Text/Excel).

   The following options are available:
   - UTF-8
   - ISO-88591 (LATIN-1)
   - UTF-16LE (Unicode Text/Excel)

2. Click Download.

3. The file you download will be a .txt file. To edit the file, open it in Microsoft Excel or in an equivalent spreadsheet editing application.

Open your .txt file as a KBART spreadsheet

Open the .txt file you downloaded from the WorldShare interface in a spreadsheet editing application:

1. Open the .txt file in Notepad or TextEdit.
2. Navigate to Edit > Select All and copy the entire selection.
3. Open Open Office, Microsoft Excel, or your preferred spreadsheet editing application.
4. Click in the first cell of the spreadsheet and then right click and paste. The content of the .txt file will populate the spreadsheet in KBART format.

5. Sometimes tab delimited text files get corrupted in the process of opening them. Check to make sure that the following columns are not reformatted and correct the formatting if needed:
   - Date columns
   - ISSN (print_identifier)
   - eISSN (online_identifier)

**Caution:** If you wish to download the titles from a very large collection such as a HathiTrust collection or an Internet Archive collection, it will download but will truncate your titles. See Download large files for Internet Archive and HathiTrust collections and for My Selected Titles (KBART) for more information.

**Save your file**

Before you upload your file to the WorldShare interface, save your spreadsheet as Text (Tab delimited) (.txt). If it includes diacritics, save it as Unicode Text (.txt).

Note: Save your file as Unicode Text (.txt) even if your collection data includes Non-Latin/Non-Roman characters. When you upload the file in the WorldShare interface, use the File encoding drop-down list to change the default selection to UTF-16LE (Unicode Text/Excel).

**Upload File**

In the Titles accordion, expand the More Actions drop-list to select **Upload File** to upload a KBART file.

**Choose an upload Scope**

1. In the Upload Collection File box, choose the **Scope** of your file:
   - **Update changes only** *(default)*
     Choosing "Update changes only" causes the system to look only for changes in the file and to use the specified ACTION value to determine how to process the changes. Choose this option if:
     - You are creating a collection for the first time
     - You have made changes to title data and are using the "overlay" or "covoverlay" ACTION value
   - **Replace holdings in collection**
     Choosing "Replace holdings in collection" will cause the system to delete or deselect any existing title selections in the collection and replace them with the information in the new file you are uploading. Choose this option if:
     - You are using a file to delete or deselect titles from a collection
2. Leave the Upload type set as "KBART."

Caution: The "Update changes only" scope might encounter indexing issues if you attempt to upload files to a collection repeatedly. This is not a problem with the "Replace holdings" in collection scope.

Choose an upload File encoding

1. Leave the default File encoding UTF-8 unless you need to change it. If your collection data includes Non-Latin/Non-Roman characters, use the File encoding drop-down list to change the default selection to UTF-16LE (Unicode Text/Excel).
   The following options are available:
   ◦ UTF-8
   ◦ ISO-88591 (LATIN-1)
   ◦ UTF-16LE (Unicode Text/Excel)
2. Browse for and select your .txt file and click Upload.

Note: The collection will then be locked for re-indexing until your changes have had time to process.

Caution: Excel files (.xls) and (.xlsx) will NOT upload correctly. Your file should be saved as a (.txt) tab delimited text file, Unicode Text .txt.

Add a title

Use the Add a Title drop-down list to select how you would like to add a knowledge base title. Choose: Manual or Lookup by OCN.
Manual

Select this option to add new titles by manually typing in the information. To add title data manually:

1. From the Add a Title drop-down list, select Manual.
2. Select a Format.
3. Enter required fields. The required fields differ depending on the format:
   - If creating an e-resource collection, enter a Title URL that resolves to a homepage for each title
   - If creating a print journal collection, for Coverage, select Print when representing your coverage information
   - Use the correct date format (YYYY-MM-DD). See KBART values and formatting for details
4. Enter title information such as:
   - Title
   - ISBN
   - Publication date
5. Click Save.
6. Repeat the steps to add each title until you have added all of the titles for the collection.

Lookup by OCN

Select this option have the system fill in title data automatically. To add a title automatically:

1. From the Add a Title drop-down list, select Lookup by OCN.
2. Enter the OCLC number in the box that appears and click Continue. The system will find the master record and automatically fill in the available information such as:
   - Title, OCLC number, Format type, and so forth
3. We recommend that you check the Format type for accuracy.
4. If needed, populate:
   1. Your coverage information
   2. Title URLs
History

The collection level history accumulates events from the Activity History that pertain to the active collection.