Collection-level settings in knowledge base collections

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.

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:

- Starts with the word "customer"
- Follows the format: customer.[regid].[unique value]. For example: customer.91475.1

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.
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.

Description

Use this field to add a basic description of the collection. It will display at the collection level in the A-Z list.

A collection-level Public note will also display in the A-Z list. For titles within the collection, the collection-level Public note will display in the WorldCat Discovery interface but the Description will not.

Data Version

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

Created

This field shows a time stamp indicating when the collection was created.

Selected

This field shows a time stamp indicating when the collection was selected.

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.

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.

- The collection-level Public note will be displayed in your WorldCat Discovery A-Z list. For titles within the collection, the collection-level Public note will display in the WorldCat Discovery interface along with the title-level notes.
- 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.

Attributes

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

- **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 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 use 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.
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.

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 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.

Title Link Formula placeholders:

- [[localstem]]: proxy prefix (if enabled)
- [[url]]: Title URL from individual Title listing, pull link directly from Title_URL field in KBART
- [[jKey]]: Journal Linking Key from individual Title listing
- [[bKey]]: Book Linking Key from individual Title listing
- [[ISSN]]: ISSN from individual Title listing
- [[eISSN]]: eISSN from individual Title listing
- [[ISBN]]: ISBN from individual Title listing
- [dbo]: Database Linking Key from Linking section
- The provider-specific settings from Institutional Settings > Provider Settings.

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
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 Institutional Settings > 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:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use institutional setting (default)</td>
<td>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 &gt; Proxy and Authentication:</td>
</tr>
<tr>
<td>Override for this collection</td>
<td>Choose this setting if you wish to override the institution setting for this collection. Select your proxy service and enter your information. EZproxy users:</td>
</tr>
<tr>
<td></td>
<td>• Enter your <strong>Base URL</strong>. Example of a EZproxy base URL: <a href="http://ezproxy.oclc.org/login?url=">http://ezproxy.oclc.org/login?url=</a></td>
</tr>
<tr>
<td></td>
<td>III WAM Proxy users:</td>
</tr>
<tr>
<td></td>
<td>• Enter the <strong>Hostname</strong>. Example of a III WAM Proxy hostname: sys.lib.proxy.edu</td>
</tr>
<tr>
<td>No proxy needed</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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 or delete 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.
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**

Customize the information included in the output of MARC records for an individual collection.

**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).

![MARC Custom Text](image-url)
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](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Knowledge_base_collections/About_knowledge_base_without_multiple_records) 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:

```
metacoll.[XXX].new.D20160214.T210512.[YourFileName].1.mrc
```

**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></td>
<td></td>
<td></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/Knowledge_base_collections/About_knowledge_base_collections) 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/Knowledge_base_collections/About_knowledge_base_collections) 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](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Knowledge_base_collections/About_knowledge_base_collections) and/or the documentation on how to [Modify a collection to select your subset of titles](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Knowledge_base_collections/About_knowledge_base_collections) for more information.

**Add a Global Title**

When viewing a global collection, use the **Add a Global Title** drop-down and select **Create a Title** to add a knowledge base title. See [How to add a new title to an existing collection](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Knowledge_base_collections/About_knowledge_base_collections) for more information.
Add a Local Title

When viewing a global collection, use the Add a Local Title drop-down to select how you will add a knowledge base title to your local collection. Select either Create a Title or Create Using OCLC Number to Pre-fill.

Create a Title

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

1. From the Add a Local Title drop-down list, select Create a Title.
2. Enter a Title Name.
3. Select the Coverage Depth. Options include:
   - Audio
   - Ebook
   - Image
   - Journal - Abstracts
   - Journal - Full Text
   - Journal - Indexed
   - Journal - Selected Full Text
   - Journal - Print
   - Video
   - Other
4. Enter required fields. The required fields differ depending on the Coverage Depth:
   - 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](https://help.oclc.org/Metadata_Services) for details.

5. Enter the appropriate Linking information. See [Title level settings in knowledge base collections, Linking](https://help.oclc.org/Metadata_Services).  
6. Click **Save**.  
7. Repeat the steps to add each title until you have added all of the titles for the collection.

### Create Using OCLC Number to Pre-fill

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

1. From the **Add a Local Title** drop-down list, select **Create Using OCLC Number to Pre-fill**.
2. Enter the OCLC number in the box that appears and click **Continue**. The system will find the WorldCat record and automatically fill in the available information such as:
   - Title, OCLC number, Coverage Depth, and so forth.
3. We recommend that you check the Coverage Depth for accuracy.
4. If needed, populate:
   1. Your coverage information
   2. Title URLs

### Auto Select Titles

The **Auto Select Titles** setting in global knowledge base collections enables functionality to automatically select titles as they are added from OCLC data updates. You can enable or disable the setting regardless of whether you have selected a collection in full or have selected a subset of titles.

The default setting depends on if you selected all or a subset of titles in a collection:

- All titles in a collection are selected - Enabled by default
- A subset of titles in a collection are selected - Disabled by default

You can enable or disable the setting at any time. For example, if you have all titles in a collection selected except for a few that are regionally restricted, the setting will be disabled by default. Enable **Auto Select Titles** if you want newly added titles to be automatically selected. Enabling the setting will not change your current title selections. Rather, titles added in future data updates will be automatically selected.

Note: When a collection is being updated by an automated holdings feed, you should not select the option to Auto Select Titles in the Titles accordion of the collection's settings. Refer to [Providers and contacts for automatic collection loading](https://help.oclc.org/Metadata_Services) for more information.

### Collection History

The collection level history accumulates events from the **Activity History** that pertain to the active collection. See [Knowledge base collection Activity History](https://help.oclc.org/Metadata_Services) for more information.
Collection Actions

Both global and local collections have the option to **Download Titles in This Collection** and **Upload Titles to This Collection**. Local collections include the option to **Delete Collection** and **Promote Collection to Global Knowledge Base** whereas global collections allow you to **Deselect Collection**.

**Global Collection Actions - Image**

**Local Collection Actions - Image**
Deselect Collection

For global Knowledge base collections, use the Collection Actions > Deselect Collection to deselect the collection from your knowledge base.

Delete Collection

For local Knowledge base collections, use the Collection Actions > Delete Collection to delete the collection from your knowledge base.

Promote Collection to Global Knowledge Base

For local Knowledge base collections, you have the option to promote the collection to the global knowledge base to be used by all other libraries. For more information, see Promote a collection to the global knowledge base.

Download Titles in This Collection

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:
   - 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
   - My Selected Titles
     If you have selected titles in the collection, you will see the scope "My Selected Titles". Selecting this scope means 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

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 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 columns are not reformatted and correct the formatting if needed. For example, the below columns may more frequently need correcting:
   ◦ Date columns
   ◦ ISSN or ISBN (print_identifier)
   ◦ eISSN or eISBN (online_identifier)
   ◦ OCLC Entry ID (oclc_entry_id)

**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)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Knowledge_base_collections/About_knowledge_base_collections) for more information.

### Save your file

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

Note: If the file includes diacritics, including Non-Latin/Non-Roman characters, save it as Unicode Text (.txt). 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 Titles to This Collection

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 all titles in collection**
     Choosing "Replace all titles 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. 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)

3. 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.