About cataloging partner collections

Get an overview of information about cataloging partner collections in Collection Manager. See how your institution record profile and your collection-level settings interact.

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Libraries use cataloging partner collections in agreement with material providers and OCLC to set holdings and to deliver records and spine labels for materials ordered from providers. Collection Manager automatically delivers records that already exist in WorldCat based on titles you have purchased from your material provider. For a list of providers, see WorldCat based on titles you have purchased from your material provider. For a list of providers, see Material providers for cataloging partner collections.

After you order items from your provider, at your request, your provider will send to OCLC your electronic order information that contains bibliographic data about the titles you have ordered. The time it takes your provider to send OCLC your order information varies by provider. Once you have created and activated your collection and your provider has sent your electronic order information, OCLC will begin processing the provider data you have mapped in Collection Manager. Your files will be available for download from the WorldShare interface.

Watch a video

Introduction and overview (6:00)

This video is a brief introduction and overview for new users of WorldCat cataloging partner collections in WorldShare® Collection Manager.

Watch a video

Login and set or reset your password: getting started (4:44)

This video shows how to log in to the WorldShare® Interface and how to set or reset your password. It also shows how to create new users from within the WorldShare interface.
Settings and collection-level overrides

Institution record settings and collection-level settings interact. It is useful to understand that interaction before you get started. Continue reading for an overview of how institution record settings and collection-level settings interact.

About customizing your records

The institution record settings in Collection Manager > Institution Settings > MARC Records apply across all of your collections for which you enable record delivery. Collection Manager is designed to operate with a single configuration of these settings. Thus, you need to represent any data elements that you need mapped in your records in the single profile area in your institution settings. However, you have several options to map collection-specific data to your records, enter collection-specific notes within collections, and options within collections to override your institution settings.

Institution MARC Records settings

When you begin to customize your record profile, the instructions will guide you to complete the institution MARC Records settings in Institution Settings > MARC Records > Customize Records.

In the Customize Records, Add Fields area, you will have several options for adding and deleting tags, indicators, and subfields and for adding values to map data to your records.

Example, institution settings: As the picture shows, you can add a field for 945$a and the value Copy Call Number to map the 050 (LC) to your records. The call number from the master record will be included in your records for collections for which that rule can be applied.
Example, institution settings: If you would like to include collection-level custom text in records from all or from just a few of your collections, you should add a field to map collection-level custom text. For example, add a field for the 740$a and the value Collection Custom Text to map custom text you enter in specific collections. Simply map the value in the institution settings, not the text itself. Add the collection-level text within the collection, as you will see below.

Collection-level overrides and options

Within a collection, there are collection-level accordions that contain settings. To find override and other customization options within a collection, make sure to complete the options in the collection-level accordions when you create a collection. Alternatively, after you create a collection, you can search for the collection, click on the title in the search results, and expand the collection-level accordions.
You can configure collection-level overrides and enter collection-specific data within a collection. You can also override choices you made in your institution settings.

**Example, collection-level settings:** If you profile your settings for records to include the a call number from the master record, but you have a cataloging partner collection that requires a different call number, you will need to navigate to the collection and find the "Copy Call Number" area and complete the override options. If a cataloging partner collection requires the 092 (Local Dewey call number), map the data element within the collection. Note that you need to use the same tag you used in Settings (945) in order for the override to work properly.

**Example, collection-level settings:** If you mapped custom text to your records in the institution MARC Records settings in the Customize Records tab, add collection-level text in the corresponding field(s). Type in the text you would like included in records from a specific collection. It will appear in your records for the collection in the tag you defined in Institution Settings. 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.
<table>
<thead>
<tr>
<th>Text Label</th>
<th>Custom Text Notes</th>
</tr>
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<tbody>
<tr>
<td>Custom Text 1</td>
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