Create a cataloging partner collection

Follow the instructions to create a cataloging partner collection in Collection Manager.

Configure institution settings

If you haven't already, Configure institution settings for cataloging partner collections.

Gather your account information

Gather your account information including your account number(s) as defined by your provider. You will need to enter a collection ID for each collection you create under an account number. The account number and collection ID you use to create your collection must match what your provider sends to OCLC in your manifest.

When you customize your record profile in Collection Manager, you will have options for mapping data values to your records. Note that much of the data is supplied by your material provider. Providers differ in what library-specific data they send. Please contact your provider if you have questions about what they send OCLC on your behalf. See the data values available in Collection Manager.

See the list of Material providers for cataloging partner collections.

Create a collection

Watch a video

Create a WorldCat cataloging partner collection (16:29)

This video shows how to create a WorldCat® cataloging partner collection in WorldShare® Collection Manager.

Navigate to Create a Collection

1. Navigate to Collection Manager > Create a Collection.
2. Select Cataloging partner collection.

Complete the collection-level fields

Note that when you create a cataloging partner collection, the account number is that defined by your provider and the collection ID must match what your provider sends OCLC in your manifest. Coordinate with your provider as needed. Please remember to SAVE. If your session times out, you could lose your work.

Complete the required collection-level fields:

1. In the Properties accordion, complete:
   a. Collection Name (required)
   b. Provider (required)
   c. Account Number (required; defined by your material provider)
   d. Collection ID (required; coordinate with your material provider)

Complete the remaining collection-level accordions:

2. WorldCat Holdings
3. MARC Records
   ◦ To enable MARC record delivery for multiple cataloging collections at one time, see Enable MARC record delivery for multiple collections.
4. Labels
5. Dewey Call Numbers

For a complete list and details about cataloging partner collection-level settings, see Cataloging partner collection-level settings.

Create another collection

If you have multiple collections under one provider or account, create the remaining collection(s). Otherwise, continue to the next step to enable MARC record delivery for your collections.

Enable MARC record delivery for multiple collections

Cataloging partner collections must be enabled for MARC record delivery to ensure files of records and labels are delivered. If you did not enable MARC record delivery in the collection individually, use the Collection Actions dropdown to Enable or Disable MARC record delivery for multiple cataloging partner collections at one time.

Search for cataloging partner collections that you have already created:

1. Navigate to the search box in Collection Manager. Leave My Selected Collections selected.
2. Click Search. The search will return all of the collections your library has selected or created.
3. Select Cataloging Partner Collections from the Filter by drop-down list.
Once you have used the search and filter to find your cataloging partner collections, you can select multiple collections and perform a collection action. To enable record delivery in multiple cataloging partner collections at one time, continue with the following steps:

4. Click the box next to each collection you need to enable for MARC Record delivery or click the box at the top of the results list to select all of the collections.

5. At the top of the screen, expand Collection Actions and select Cataloging Partner Collections.

6. Select Enable MARC Record Delivery.