Choose your Collection Manager workflow

Choose how you will use Collection Manager. See the descriptions of the five collection types and choose one to see how to create a collection.

Unsure of which workflow you need?

<table>
<thead>
<tr>
<th>I ...</th>
<th>USE A ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need to register my shared print retention commitments as an agent/group coordinator</td>
<td>Shared print collection profile</td>
</tr>
<tr>
<td>Need to register my shared print retention commitments for individual non-WMS libraries</td>
<td>Shared print collection profile</td>
</tr>
<tr>
<td>Need to register my shared print retention commitments for individual WMS libraries</td>
<td>Shared print collection profile</td>
</tr>
<tr>
<td>Need to synchronize my holdings in WorldCat with my local catalog</td>
<td>Data sync collection</td>
</tr>
<tr>
<td>Need to synchronize or update my holdings in WorldCat with my local catalog using a third-party provider or consortial partner/head.</td>
<td>Data sync collection</td>
</tr>
<tr>
<td>Need to synchronize or update holdings in WorldCat for a library's local catalog on behalf of a library</td>
<td>Data sync collection</td>
</tr>
<tr>
<td>Need to update my current holdings in WorldCat</td>
<td>Data sync collection</td>
</tr>
<tr>
<td>Purchased an ebook/ejournal package and I need MARC records</td>
<td>Knowledge base collection</td>
</tr>
<tr>
<td>Purchased an ebook/ejournal package and I want to set my holdings in WorldCat</td>
<td>Knowledge base collection</td>
</tr>
<tr>
<td>Receive shelf-ready titles from my vendor and I want to set holdings for those materials in WorldCat (and/or receive MARC records)</td>
<td>Cataloging partner collection</td>
</tr>
<tr>
<td>Want OCLC MARC records for my holdings</td>
<td>Query collection</td>
</tr>
<tr>
<td>Want to automatically receive updated records when the cooperative enriches records in WorldCat</td>
<td>WorldCat updates</td>
</tr>
</tbody>
</table>
I ... | USE A ...  
--- | ---  
Want to receive a file of MARC records based on a search query that I performed in WorldCat | Query collection  
Work with a vendor that says I can get an automated holdings feed from Collection Manager | Knowledge base collection  
Work with a vendor that says I can get MARC records and spine label files from WorldShare Collection Manager | Cataloging partner collection  

Learn more in a training course: Collection Manager: What it is and why it matters

• Knowledge base collections

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  Use Collection Manager to manage your electronic resources and automatically maintain WorldCat holdings. Use your collection data with other OCLC services, display full-text links, and get WorldCat records.

  ◦ About knowledge base collections in Collection Manager
  ◦ Choose a method to add or create a knowledge base collection
  ◦ Configure institution settings
  ◦ Get WorldCat MARC records for knowledge base collections
  ◦ Use collection data with other services
  ◦ Maintain your knowledge base collections
  ◦ Cooperative management

• Query collections

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  Use Collection Manager to improve local catalog quality with a set of WorldCat MARC records. Create a query collection for electronic and print serials, new titles added with CONTENTdm, or to create a spreadsheet of your WorldCat holdings.

  ◦ About query collections in Collection Manager
  ◦ Create a query collection
  ◦ Create a query collection to get a spreadsheet of your holdings
  ◦ Create a query collection to get records for CONTENTdm and Digital Collection Gateway titles
• Cataloging partner collections

Use Collection Manager to get new print materials into circulation quickly. Ask your provider to send OCLC your electronic order information. Create a cataloging partner collection to set WorldCat holdings and get book spine labels and WorldCat MARC records that include your provider data.

◦ About cataloging partner collections in Collection Manager
◦ Create a cataloging partner collection

• Data sync collections

Use Collection Manager to synchronize your catalog with WorldCat. Create a data sync collection to maintain your holdings, local bibliographic data, and local holdings records in WorldCat. Match brief records in your local system to current WorldCat records to get a more complete representation of your holdings.

◦ About data sync collections in Collection Manager
◦ Prepare your data
◦ Create a bibliographic collection for a reclamation
◦ Create an ongoing data sync collection
◦ Third-party provider and consortial partner/head guidelines for data sync
◦ Reference

• WorldCat updates

Use Collection Manager to keep your WorldCat MARC records up-to-date. Enable WorldCat updates to automatically receive updated MARC records for your holdings in WorldCat as master records are enhanced.

◦ About WorldCat updates through Collection Manager
◦ Enable WorldCat updates

• Use Collection Manager with a CatExpress subscription or without a subscription

Collection Manager is part of the value of your OCLC Cataloging and Metadata Subscription or your CatExpress subscription. Libraries without a cataloging subscription can get records for collections from selective providers.

◦ Options for libraries with a CatExpress subscription
◦ Options for libraries without a cataloging subscription

• Use Collection Manager for content from a specific provider

If your interest in content from a specific provider has lead you to Collection Manager, see a list of providers and provider-specific workflows. The instructions will guide you to get WorldCat records, holdings, and/or full-text
links for content from your providers.

- Material providers for cataloging partner collections
- OCLC cataloged collections
- Providers and contacts for automatic collection loading
- Records through Contract Cataloging services