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](<a href="https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_work">https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_work</a>...</td>
</tr>
</tbody>
</table>
Work with a vendor that says I can get an automated holdings feed from Collection Manager

Work with a vendor that says I can get MARC records and spine label files from WorldShare Collection Manager

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**

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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**

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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
- Reference

**WorldCat updates**

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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**

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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**

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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