

## OCLC WorldShare Collection Manager quick start guide for JSTOR libraries

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*Note: The screenshots herein are given for illustration only. Screen displays may vary depending upon the current site design and the WorldShare services to which your library subscribes.*

### Initial sign-in / Change password

- 1) If you have not already been provisioned for Collection Manager, please complete the online form at <https://www.oclc.org/forms/col-man-marc.en.html>.

Please provide your OCLC symbol and/or Registry ID, if known; however, you may still submit form without either of these.

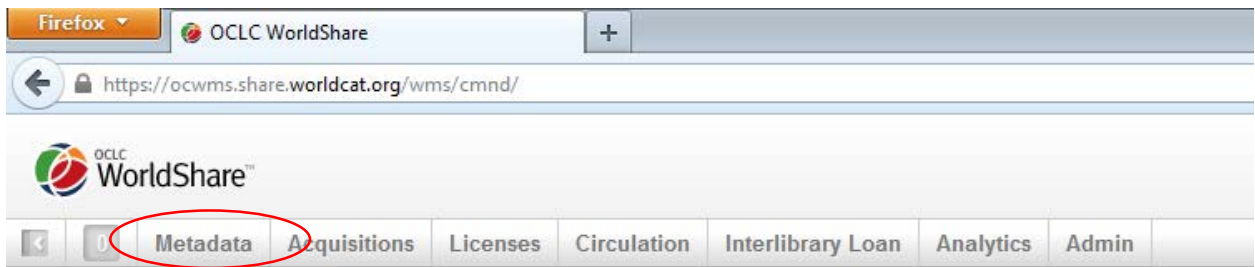
- 2) After completing the online form to be provisioned, you will receive an email from OCLC Order Services giving you a library-specific URL for accessing WorldShare.

Once you receive that email, please follow the accompanying instructions for setting you username and/or password (the specific steps are dependent upon your OCLC cataloging subscription level).

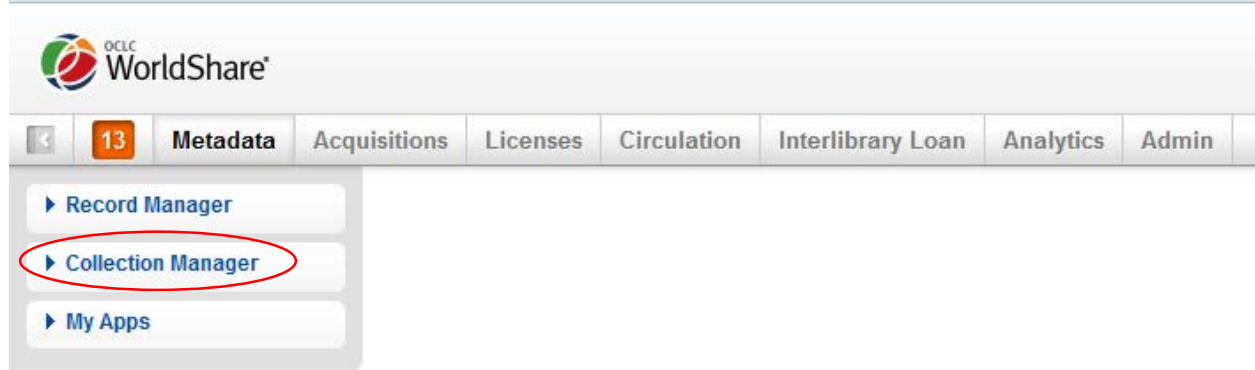
- 3) Once your password has been set, log into WorldShare.

## Verify preferred OCLC symbol

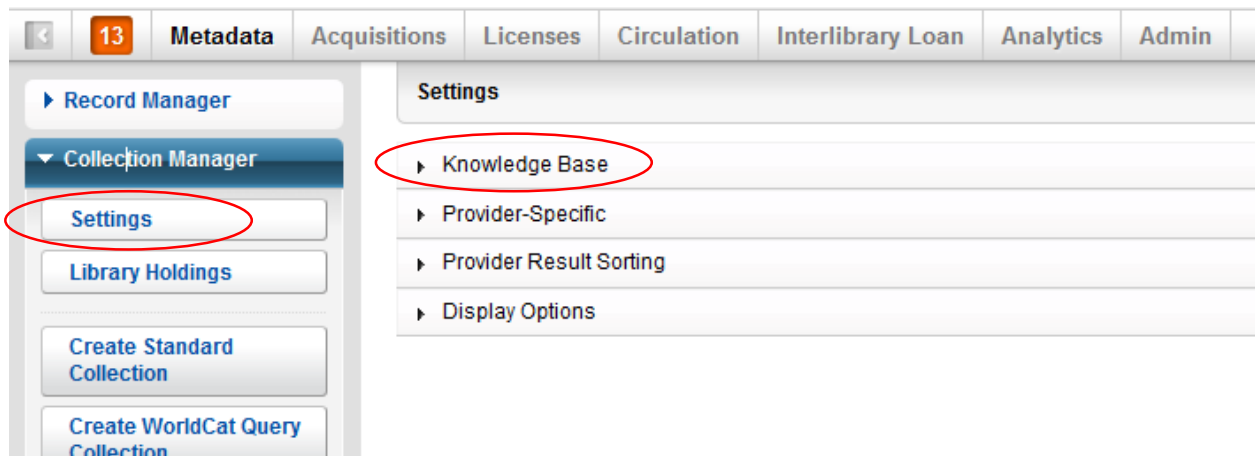
- 4) Click on the “Metadata” tab.



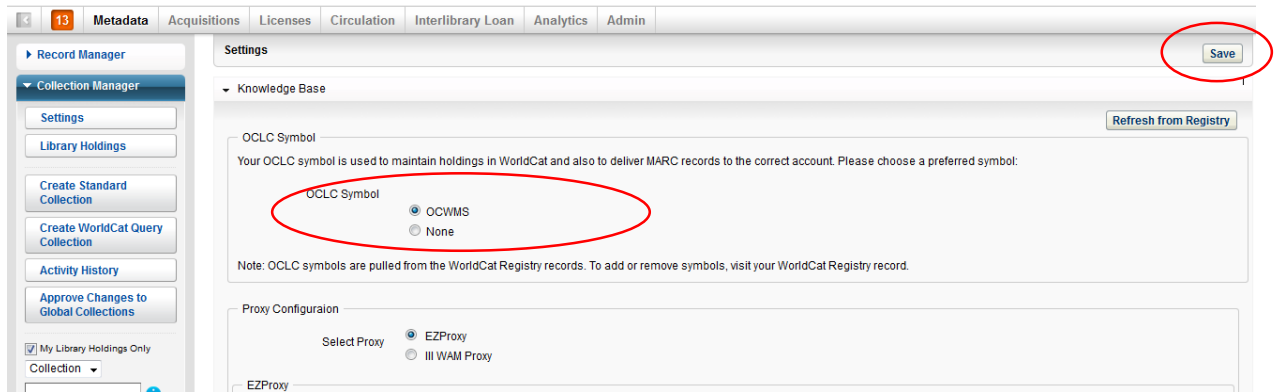
- 5) Click “Collection Manager” in the navigation pane that opens on the left.



- 6) Click “Settings”, then click “Knowledge Base” in the pane that opens on the right.



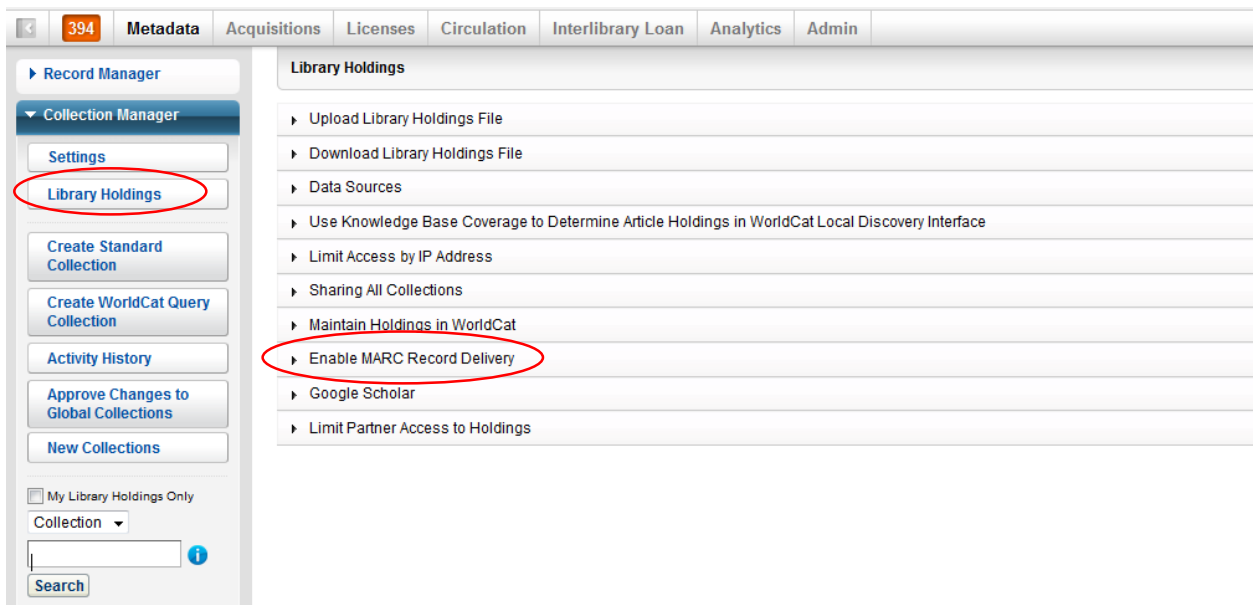
- 7) After clicking “Knowledge Base” in the step above, verify that the radio button for your preferred OCLC symbol is selected. Once the correct symbol is selected, click “Save” in the upper-right corner.



You can also save your institution's proxy information, which will be prepended to the hyperlinks in your MARC records' 856 fields.

## MARC editing options

- 8) In the left-hand navigation pane, click "Library Holdings" and then "Enable MARC Record Delivery".



- 9) Click the radio button for "Yes" and MARC record editing options will appear. The options given under the four tabs here will be applied globally to all of your collections. (You will have the option of defining set-specific preferences later.)

Please note: You MUST click the "Save" button in the upper right corner of the screen before moving to a different tab (or menu option under "Library Holdings") in order to save the preferences you have specified.

Yes  No  
 Setting this selection to Yes will deliver MARC records to keep your holdings up to date in your local system.  
 OCLC Symbol OCWMS

Customize Records | WorldCat Updates | Record Delivery | Reports

Options for All Collections

Holding Library Code (049 \$a)

MAIN

Delete Fields

Tag	Ind 1	Ind 2	
029	1	Any	-

Delete Subfields

Tag	Ind 1	Ind 2	Subfield	
	Any	Any		-

Add Fields

Tag	Ind 1	Ind 2	Subfield	Value	Tag
	Blank	Blank			

Customize 856 Field for Standard Collections

Add Subfields

Subfield	Value
u	[KB URL]

10) The “Customize Records” tab details the editing options available to you, which chiefly comprise constant data at the field and subfield levels, as well as defining which fields/subfields to delete.

Please note that a four-character holding library code is required. You may accept the default of “MAIN” or enter a different value.

Please also note that Collection Manager will edit a 590 field into each record specifying the collection name by default. In the case of the Books at JSTOR collections (i.e., “Books at JSTOR All Purchased” and “Books at JSTOR Demand Driven Acquisitions”), this is how the MARC record will reflect whether the title is purchased or part of a DDA corpus.

(For more details on Collection Manager’s customization options, including collection-specific notes, please see <http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/customize-marc-records.en.html>.)

Please click the “Save” button in the upper right of the screen before moving on.

## WorldCat updates

11) The “WorldCat Updates” tab allows you to define for all collections when you would like to receive updated records as the master records in WorldCat change. These updates have been turned on by default. You may expand the “Specify Including Conditions” and “Specify Excluding Conditions” sections to precisely define which changes to master records will trigger a redelivery.

There is also the option to select “None” if you do not wish to receive the WorldCat Update records triggered by the cataloging community at large. With this option set to “None” you will still receive

essential update records, such as those that reflect a knowledge base URL change, a change to proxy server settings, or a change to a title's associated OCLC Control Number. If your library participates in demand-driven acquisitions, then you will still receive update records as records "move" from the "DDA" collection to the "Purchased" collection.

The screenshot shows the 'WorldCat Updates' tab in the Collection Manager interface. It features a navigation bar with 'Customize Records', 'WorldCat Updates', 'Record Delivery', and 'Reports'. The main content area is divided into two sections: 'Updates' and 'Update Conditions'. In the 'Updates' section, there are three radio button options: 'None', 'Based on changes to WorldCat master records for my knowledge base Standard and WorldCat Query collections' (which is selected), and 'Based on changes to WorldCat master records for my knowledge base Standard and WorldCat Query collections and my WorldCat holdings'. The 'Update Conditions' section has a heading 'Define criteria to determine when you would like to receive updated records based on changes to the WorldCat master record.' and two radio button options: 'Any change to the WorldCat master record' and 'Select options for specific changes to the WorldCat master record' (which is selected). Below these are two expandable sections: 'Specify Including Conditions' and 'Specify Excluding Conditions'.

(For more details on Collection Manager's customization options, please see [http://www.oclc.org/support/help/collectionmanager/default.htm#settings/worldcat\\_updates.htm](http://www.oclc.org/support/help/collectionmanager/default.htm#settings/worldcat_updates.htm) Please click the "Save" button in the upper right of the screen before moving on.

## Record delivery preferences

- 12) The "Record Delivery" tab allows you to define your output file format (e.g. MARC 21, UNIMARC, MARXML, etc.) and character set (MARC-8 or UNICODE), as well as the file delivery frequency.

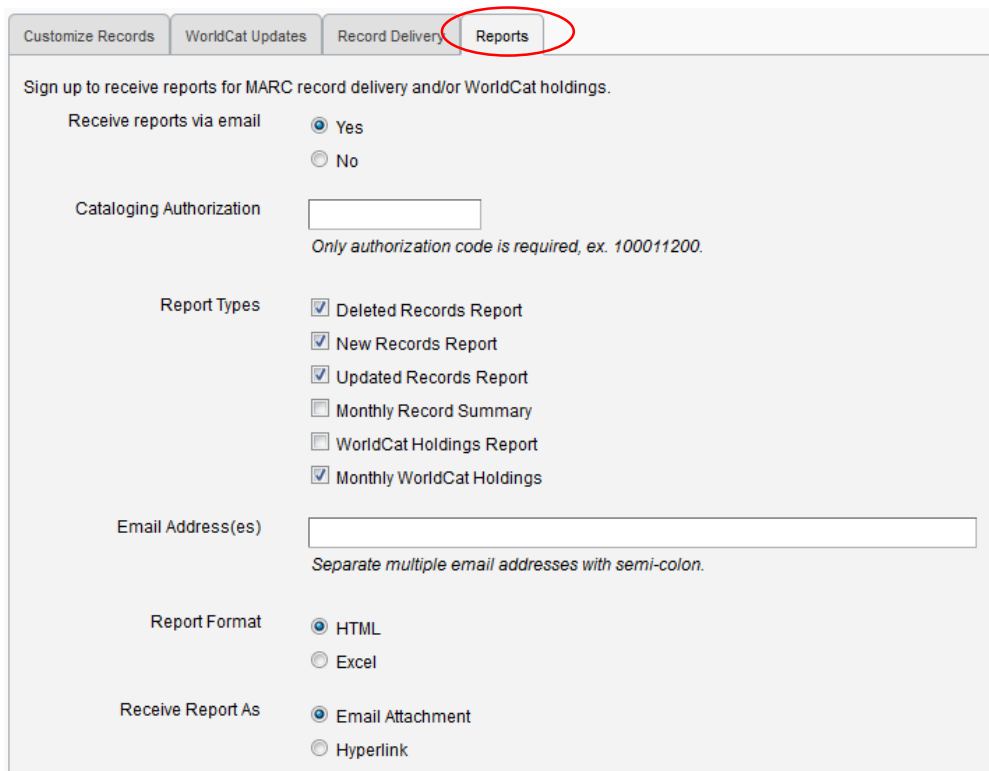
(For more details on Collection Manager's record delivery options, please see <http://oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/record-delivery.en.html>.)

Please click the "Save" button in the upper right of the screen before moving on.

## Reports

- 13) Collection Manager offers the option to receive reports for MARC record deliveries and/or WorldCat holdings (the latter only if your library has an OCLC cataloging or CatExpress subscription).

Use the "Reports" tab to opt in for these notifications. You will need a valid 9-digit OCLC authorization (such as a Connexion authorization). If you do not have an authorization number, you may contact OCLC Order Services at [orders@oclc.org](mailto:orders@oclc.org) to obtain one.



Customize Records WorldCat Updates Record Delivery **Reports**

Sign up to receive reports for MARC record delivery and/or WorldCat holdings.

Receive reports via email  Yes  
 No

Cataloging Authorization   
*Only authorization code is required, ex. 100011200.*

Report Types  Deleted Records Report  
 New Records Report  
 Updated Records Report  
 Monthly Record Summary  
 WorldCat Holdings Report  
 Monthly WorldCat Holdings

Email Address(es)   
*Separate multiple email addresses with semi-colon.*

Report Format  HTML  
 Excel

Receive Report As  Email Attachment  
 Hyperlink

(For more details on Collection Manager’s reporting options, please see <http://www.oclc.org/support/services/collection-manager/documentation/settings-glossary/reports.en.html>.)

Please click the “Save” button in the upper right of the screen.

## JSTOR holdings feed

14) JSTOR sends a weekly holdings feed into OCLC’s knowledge base. It is this holdings feed that dictates whether or not MARC records are delivered to your Collection Manager account and, if yes, which ones.

Additionally, for those libraries using WorldCat Local, this feed is used to specify your holdings there. Please see Appendix for additional details for syncing your Knowledge Base holdings with WorldCat.

When your access to your Books at JSTOR titles is activated, JSTOR will look up your institution’s OCLC symbol using OCLC’s member directory. The located symbol will be entered in JSTOR’s system, and your institution will be included in the next weekly holdings feed from JSTOR to OCLC. (This means that it might take up to a week before your first holdings report is sent to OCLC.) If you want a holdings feed sent to OCLC under a symbol not listed in the directory or if you obtain an OCLC symbol after your JSTOR access has been provisioned, then please contact [support@jstor.org](mailto:support@jstor.org) and include your OCLC symbol in order to request that JSTOR send a holdings feed to OCLC under that symbol. . Please note the OCLC symbol used in JSTOR’s holdings feed and the OCLC symbol under which your Collection Manager account is set up must match in

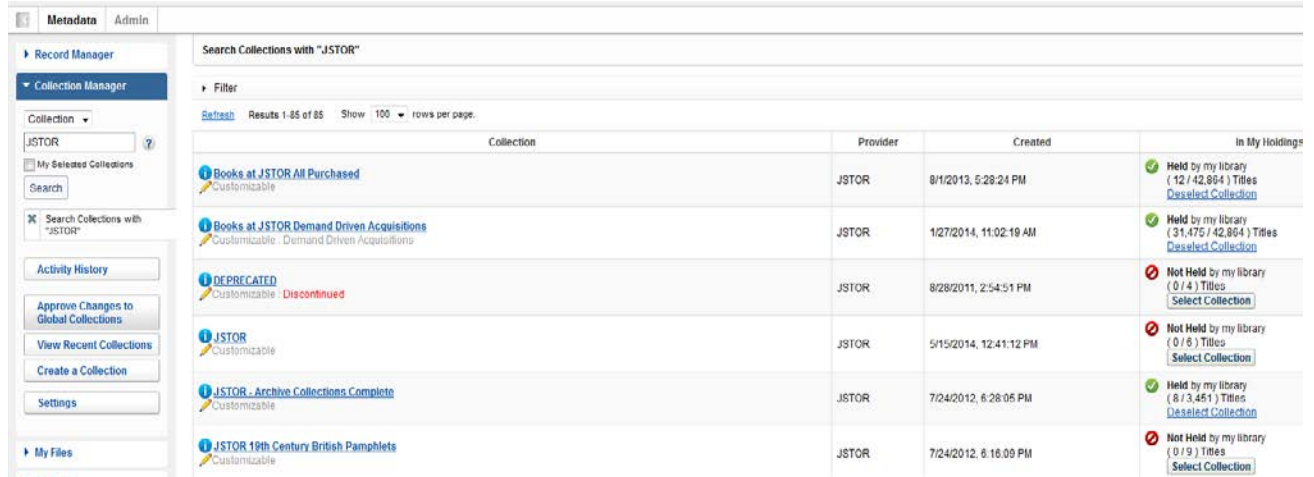
order for MARC records to be delivered.

Your holdings feed will be implemented within two weeks after its initial receipt from JSTOR and OCLC will apply the applicable collections on your behalf. You should not manually select the Books at JSTOR collections yourself. ***OCLC's processing of JSTOR's holdings feed for your library will automatically select and populate the relevant collections. Selecting the collections yourself will block JSTOR's holdings feed when sent and add delays to the setup of your account***

Please follow step #15 below to verify when your JSTOR collections have been activated.

## Collection-specific preferences and enabling MARC delivery

- 15) To view the collections for which your library has signed up uncheck “my selected collections” and search “Books at JSTOR” in the search box. Click the “Search” button.



The screenshot shows the OCLC Collection Manager interface. The search results table is as follows:

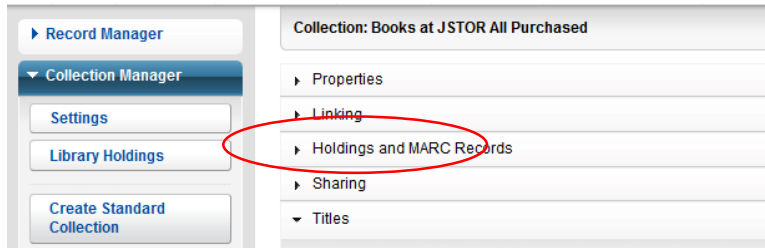
Collection	Provider	Created	In My Holdings
<a href="#">Books at JSTOR All Purchased</a> <small>Customizable</small>	JSTOR	8/1/2013, 5:28:24 PM	<input checked="" type="checkbox"/> Held by my library (12 / 42,864) Titles <a href="#">Deselect Collection</a>
<a href="#">Books at JSTOR Demand Driven Acquisitions</a> <small>Customizable - Demand Driven Acquisitions</small>	JSTOR	1/27/2014, 11:02:19 AM	<input checked="" type="checkbox"/> Held by my library (31,476 / 42,864) Titles <a href="#">Deselect Collection</a>
<a href="#">DEPRECATED</a> <small>Customizable - Discontinued</small>	JSTOR	8/28/2011, 2:54:51 PM	<input type="checkbox"/> Not Held by my library (0 / 4) Titles <a href="#">Select Collection</a>
<a href="#">JSTOR</a> <small>Customizable</small>	JSTOR	5/15/2014, 12:41:12 PM	<input type="checkbox"/> Not Held by my library (0 / 8) Titles <a href="#">Select Collection</a>
<a href="#">JSTOR - Archive Collections Complete</a> <small>Customizable</small>	JSTOR	7/24/2012, 6:28:05 PM	<input checked="" type="checkbox"/> Held by my library (8 / 3,451) Titles <a href="#">Deselect Collection</a>
<a href="#">JSTOR 19th Century British Pamphlets</a> <small>Customizable</small>	JSTOR	7/24/2012, 6:18:09 PM	<input type="checkbox"/> Not Held by my library (0 / 9) Titles <a href="#">Select Collection</a>

The collections to which your library subscribes will appear in the right pane.

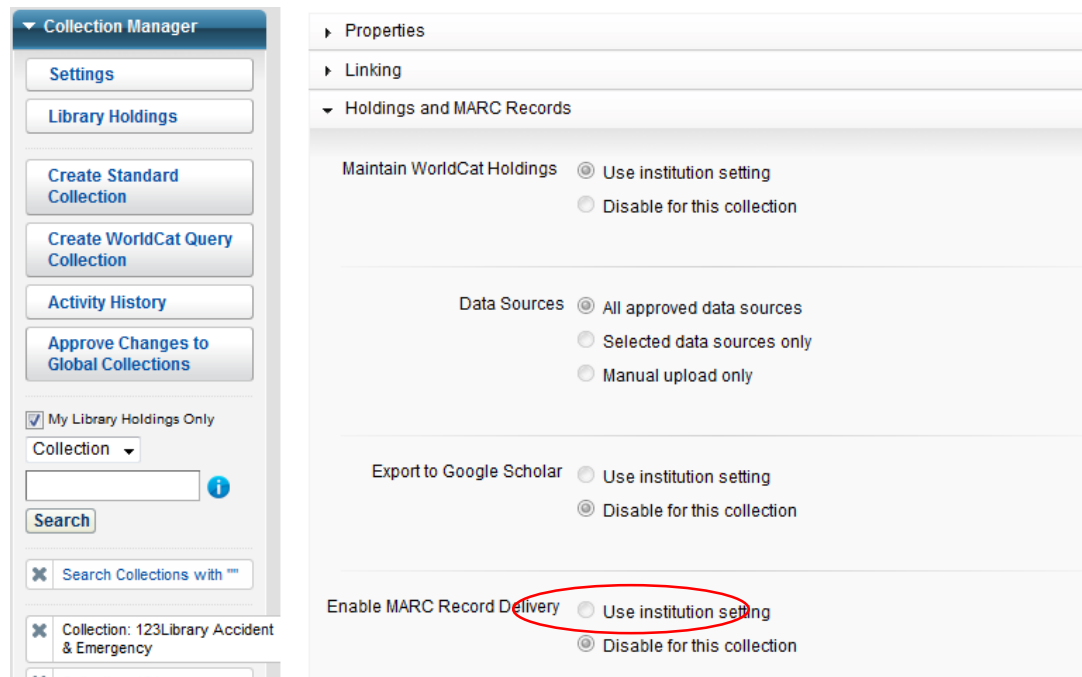
Depending upon your library’s purchasing model with JSTOR, “Books at JSTOR All Purchased” and/or “Books at JSTOR Demand Driven Acquisitions” will be appear in the results. (If no collections are displayed, then OCLC hasn’t finished loading your holdings feed. Please check back again. Remember: If a Books at JSTOR collection appears in the search results but indicates that it is not held by your library, then do not manually select it.)

Click on the name of the collection whose setting you wish to modify.

16) Click “Holdings and MARC records”, which now appears among the options in the right pane.



17) Options will then expand.



Next to “Enable MARC Record Delivery”, click the radio button for “Use institution setting”.

18) More options will expand.



Enable MARC Record Delivery  Use institution setting

**Delivery Settings**

**Delivery Frequency**  Use institution setting  
 Specify delivery frequency for this collection  
Daily ▼

**Delivery File Output**  Deliver records for this collection in the same file as other collections  
 Deliver records for this collection in a separate file  
  
*Up to 25 characters, alpha-numeric only.*

**Interleave Local Holdings Records**  Use institution setting  
 Disable for this collection

**Embed Local Bibliographic Data**  Use institution setting  
 Disable for this collection

**OCLC Symbols** OCLC symbols for which to include Local Holdings Records and / or Local Bibliographic Data  
 Use institution setting  
 OCLC symbols specified for this collection

**WorldCat Holdings** Include new records for titles already held in WorldCat  
 Yes  
 No

Options above were expanded further to illustrate how record delivery frequency and file naming can be customized for each collection.

*Note: If your library participates in demand-driven acquisitions, you may wish to have your DDA and Purchased records delivered in separate files and define a filename segment for each:*

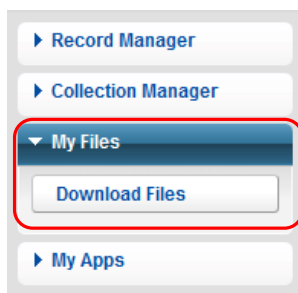
**Delivery File Output**  Deliver records for this collection in the same file as other collections  
 Deliver records for this collection in a separate file  
  
*Up to 25 characters, alpha-numeric only.*

The above steps may be performed for both the DDA and Purchased collections.

Be sure to click the “Save” button in the upper-right corner when you have finished defining your customizations.

## Downloading MARC files

- 19) You can download your records from the WorldShare interface. You do not need additional credentials. Expand “My Files” and click “Download Files”. Click the “Download” button to the right of the file you wish to download.



Hide Downloaded Files

File Name	File Source	Size	Post Date	Download Date	Action
metacoll.DXU.new.20140520.T104526.1.mrc	Collection Manager	10 KB	05/20/2014		<input type="button" value="Download"/>
metacoll.DXU.new.20140428.T104526.1.mrc	Collection Manager	10 KB	04/28/2014		<input type="button" value="Download"/>

You will see files currently available for your library to download. Files are retained on the server for 90 days.

Though OCLC and its partners work closely together to ensure a record for every e-resource title, there may be variances in the number of records received. Also, records may be in OCLC's cataloging queue depending upon JSTOR's metadata feed. .

(Additional details concerning file delivery timing and file name syntax may be found at <http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/record-retrieval-ftp.en.html>).

## Additional information

Additional documentation may be found on OCLC's website at

<http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings.en.html>

<http://www.oclc.org/support/services/collection-manager/documentation.en.html>

<http://www.oclc.org/support/services/collection-manager/faq.en.html>

Virtual office hours:

Bring your questions about using the Collection Manager application or working with WorldCat knowledge base collections. No prior registration or password is required. Call anytime within the hour.

Office hour dates may be found at <http://www.oclc.org/support/services/collection-manager.en.html#officehours>

Recorded tutorials:

<http://www.oclc.org/support/training/portfolios/cataloging-and-metadata/worldshare-collection-manager.en.html>

To change or reset your WorldShare password please see the instructions at:

<http://www.oclc.org/content/dam/support/worldshare-metadata/password.pdf>

Managing proxy information:

<http://www.oclc.org/support/services/collection-manager/documentation/settings-glossary/linking-settings.en.html>

When reviewing these links please note that the Collection Manager options available to you may vary depending upon whether your library has an OCLC cataloging subscription.

## Appendix: Managing WorldCat holdings

Please note: The following options are only available to libraries having a current OCLC cataloging or CatExpress subscription.

### Syncing your Knowledge Base holdings with WorldCat

Libraries having a current OCLC cataloging or CatExpress subscription may wish to synchronize their Knowledge Base holdings with their WorldCat holdings, such that the library's OCLC symbol is set on the WorldCat records belonging to the library's collections.

To do this, click "Library Holdings" in the left-hand navigation pane, and then click "Maintain Holdings in WorldCat". Make sure that the radio button for "Yes" is selected. You may also opt in for various activity reports by providing a valid 9-digit cataloging authorization (such as a Connexion authorization). If you do not have an authorization number, you may contact OCLC Order Services at [orders@oclc.org](mailto:orders@oclc.org) to obtain one.

Click "Save" in the upper-right corner.

The screenshot shows the WorldCat interface with the following elements:

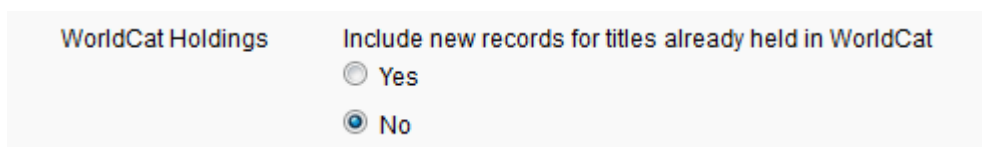
- Navigation Tabs:** Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, Admin.
- Left Navigation Pane:** Record Manager, Collection Manager (expanded), Settings, Library Holdings (circled in red), Create Standard Collection, Create WorldCat Query Collection, Activity History, Approve Changes to Global Collections, My Library Holdings Only (with search and filters), My Apps.
- Main Content Area: Library Holdings**
  - Upload Library Holdings File
  - Download Library Holdings File
  - Data Sources
  - Use Knowledge Base Coverage to Determine Article Holdings in WorldCat Local Discovery Interface
  - Limit Access by IP Address
  - Sharing All Collections
  - Maintain Holdings in WorldCat** (circled in red)
    - Yes  No
    - Display your holdings symbol OCLC on all records in WorldCat that matches your selections in the WorldCat knowledge base.
    - Sign up to receive reports for MARC record delivery and/or WorldCat holdings.
    - Receive reports via email:  Yes  No
    - Cataloging Authorization: [text input field] (Note: Only authorization code is required, ex. 100011200.)
    - Report Types:
      - Deleted Records Report
      - New Records Report
      - Updated Records Report
      - Monthly Record Summary
      - WorldCat Holdings Report
      - Monthly WorldCat Holdings
    - Email Address(es): carneyb@oclc.org (Note: Separate multiple email addresses with semi-colon.)
    - Report Format:  HTML  Excel
    - Receive Report As:  Email Attachment  Hyperlink

## Foregoing records already having your library's holdings set in WorldCat

Your first MARC file from Collection Manager will comprise records for all of the titles to which your library is entitled for that collection. This sets a baseline for future record deliveries for newly purchased titles. However, this initial file may contain records already having your WorldCat holdings attached. The benefit to receiving new copies of these records is that they will have your vendor's (vendors') URL(s) attached and they will reflect the current instance of the record in WorldCat.

But if you should decide that you'd rather not receive such records, you may opt out of getting records already having your holdings attached by referring to the "Holdings and MARC records" option described in Step #16 above under "Set-specific preferences".

Expand the arrow next to "Holdings and MARC records", ensure that the radio button next to "Enable MARC record delivery" is selected for "Use institution setting", and scroll down to the option for "WorldCat Holdings", shown below. Choose "No" to opt out.



WorldCat Holdings      Include new records for titles already held in WorldCat

Yes

No

Please click the "Save" button in the upper right of the screen.

## MARC record delivery troubleshooting checklist

### Are you having issues with the delivery of your MARC records?

1. **Are the correct number of titles showing up that you need records for in your account?** *Once the holdings feed from JSTOR has been processed, you should see the correct number of titles within a week. **DO NOT SELECT the collections manually.** Selecting the collections manually will result in a significant delay in processing of your holdings feed.*
2. **Have you enabled MARC records at the institution level?** *This means going into settings and then into MARC Records and setting this to "Yes".*
3. **Have you gone into the collection and enabled it for MARC record delivery?** *This means clicking on the collection and then opening the holdings and MARC Record accordion and setting this to "Use Institution Setting".*
4. **Is the delivery frequency for record delivery set to daily?** *Remember that delivery frequency can be set per collection and this collection-level setting will override the institution-level delivery frequency set under settings. If you set things to weekly or monthly then they will have to wait awhile for your first delivery. If you change delivery to daily, that should trigger an initial delivery and you can then set it to monthly or weekly for on-going if necessary.*