

# 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 the form without either of these.

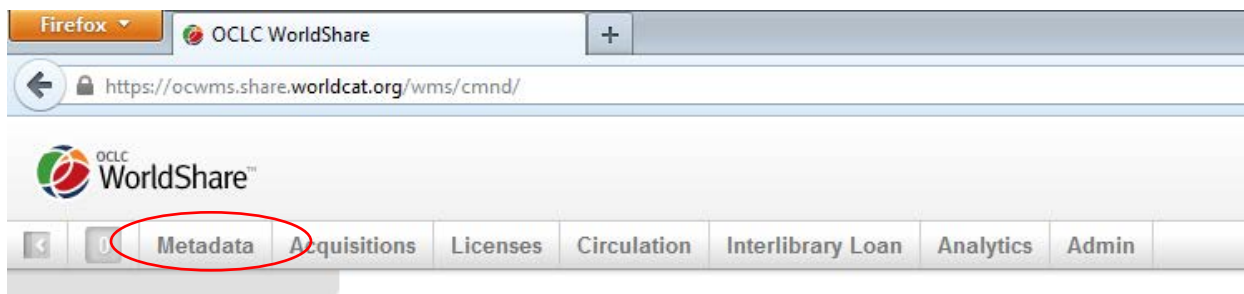
- 2) After completing the online form to be provisioned, you will receive an email from OCLC Order Services giving you a library-specific URL for accessing WorldShare.

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

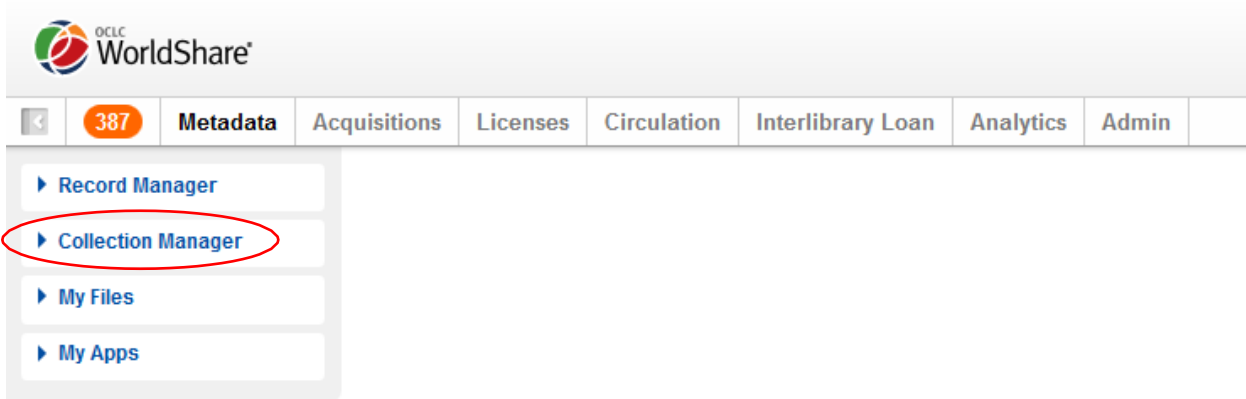
- 3) Once your password has been set, log into WorldShare.

## Verify preferred OCLC symbol and proxy credentials

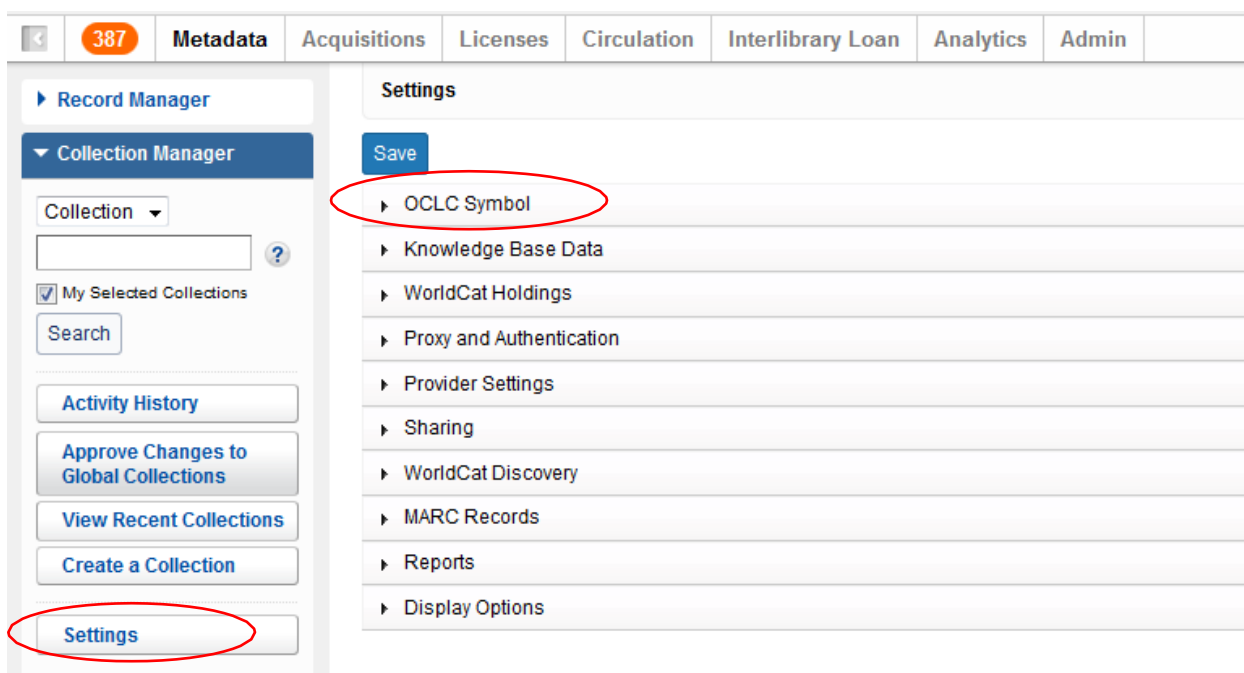
- 4) Click on the “Metadata” tab.



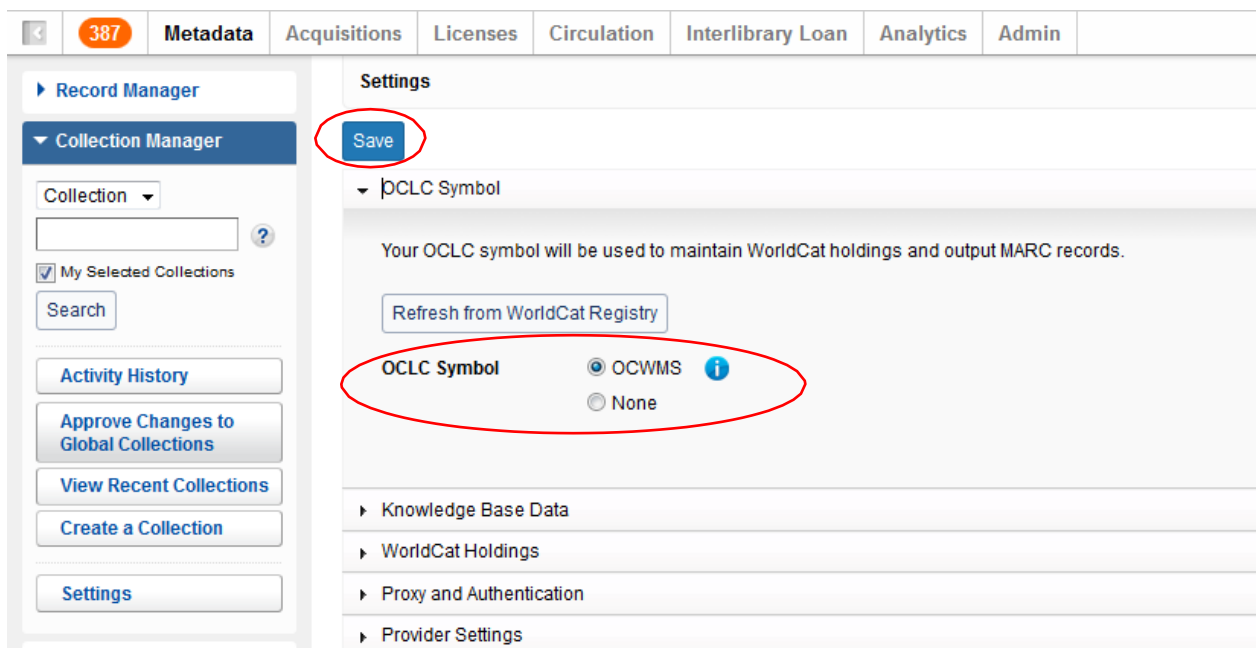
5) Click "Collection Manager" in the navigation pane that opens on the left.



6) Click "Settings", then click "OCLC Symbol" in the pane that opens on the right.



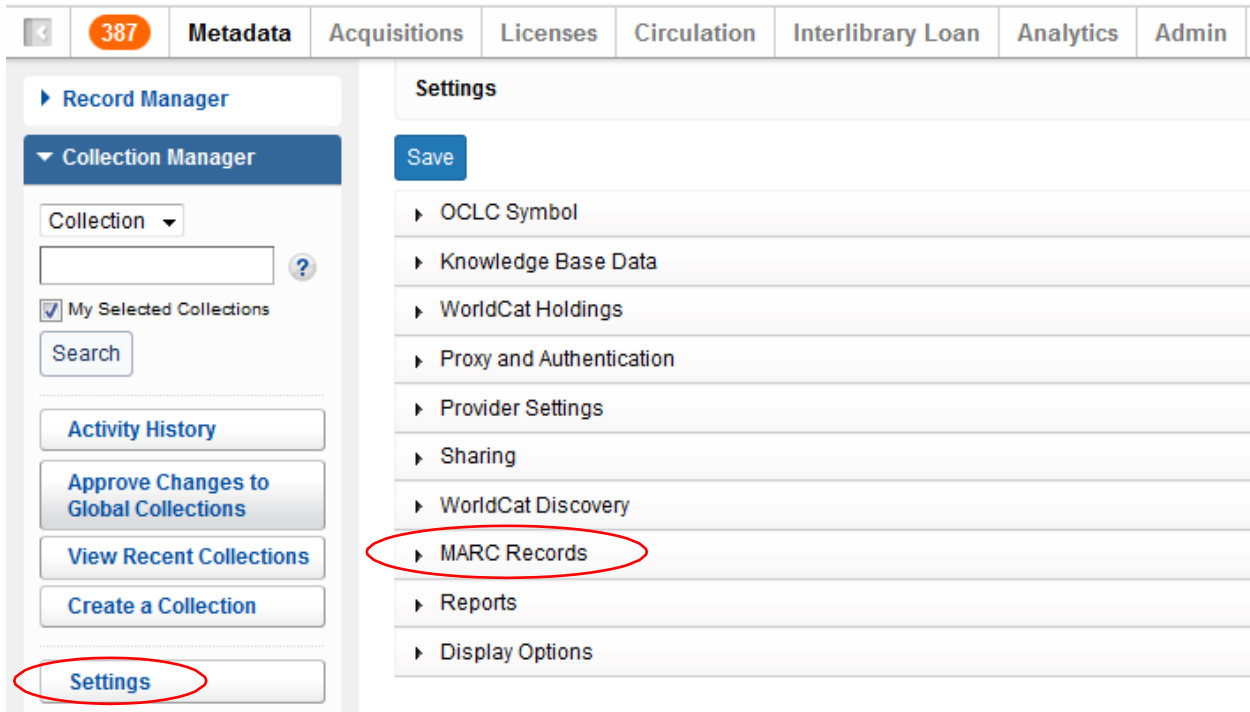
7) After clicking "OCLC Symbol" in the step above, verify that the radio button for your preferred OCLC symbol is selected. Once the correct symbol is selected, click "Save" in the upper-left corner of that pane.



You can also save your institution's proxy information, which will be prepended to the hyperlinks in your MARC records' 856 fields. To do this, expand the drop-down arrow next to "Proxy and Authentication" and enter your prefix on the "Proxy" tab. (If you use a service other than EZ Proxy, you will need to click the radio button for "III WAM Proxy".) Please remember to click the "Save" button before leaving this screen.

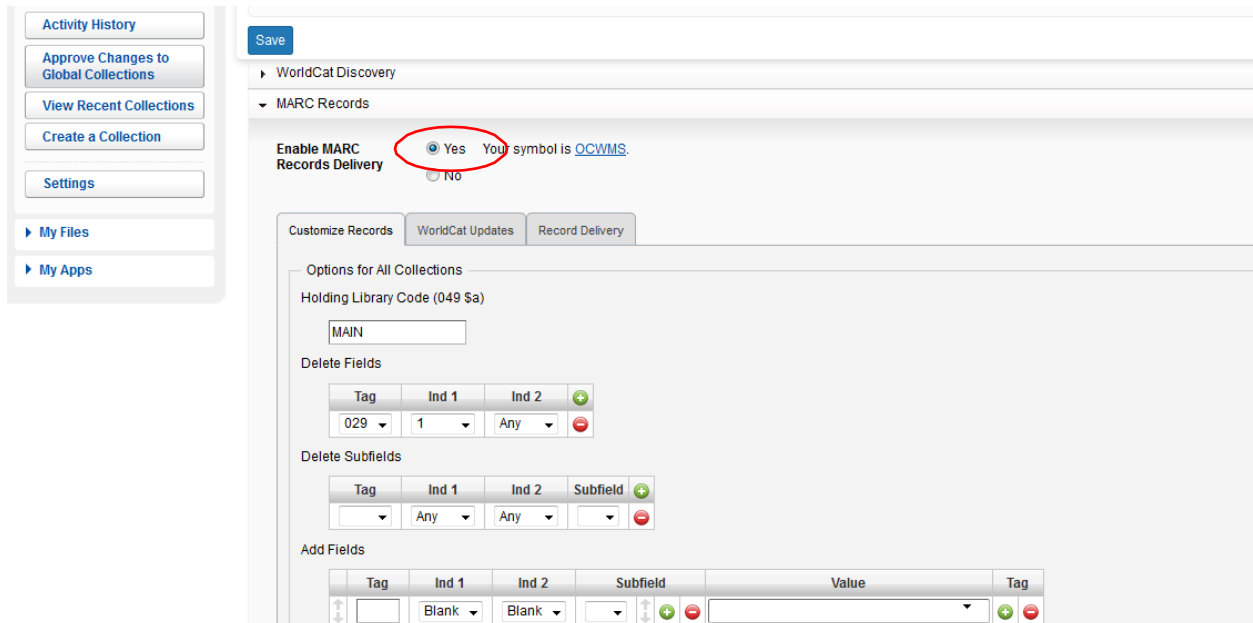
## MARC Record Delivery and Customization

- 8) Now that you have some initial profile parameters, you may wish to enable MARC record delivery.
- 9) In the left-hand navigation pane, click "Settings" and then "MARC Records".



- 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 left 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.



- 11) 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”, “Books at JSTOR Open Access”, “Books at JSTOR Demand Driven Acquisitions” and “Books at JSTOR Evidence Based Acquisitions”), this is how the MARC record will reflect whether the title is purchased, open access, or part of a provisional DDA or EBA corpus, respectively.

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 left of the screen before moving on.

## WorldCat updates

- 12) 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. When this option is set to the default of “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. And, if your library participates in demand-driven acquisitions and/or evidence based acquisitions, then you will still receive update records as records “move” from the “DDA” or “EBA” collection(s) to the “All Purchased” collection.

However, by choosing either of the “Based on changes to WorldCat master records...” options, you may profile which MARC tag and/or encoding level changes will trigger the delivery of an update record. Selecting the radio button for “Select options for specific changes to the WorldCat master record” will reveal sections to “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 left of the screen before moving on.

## Record delivery preferences

- 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 left of the screen before moving on.

## Reports

- 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.

The screenshot shows the OCLC Collection Manager interface. On the left sidebar, the 'Settings' button is circled in red. In the main content area, the 'Reports' option under the 'MARC Records' section is also circled in red. The 'Reports' section is expanded, displaying the following configuration options:

- Receive Email Reports:** Radio buttons for 'Yes' (selected) and 'No'.
- Authorization Code:** A text input field containing '999999999' with an information icon.
- Report Types:** A list of checkboxes:
  - Deleted Records Report
  - New Records Report
  - Updated Records Report
  - Monthly Records Report
  - WorldCat Holdings Report
  - Monthly WorldCat Holdings Report
- Email Address(es):** An empty text input field with an information icon.
- Report Format:** Radio buttons for 'HTML' (selected) and 'Excel'.

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 left of the screen.

## JSTOR holdings feed

- 15) 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 collection(s) yourself will block JSTOR's holdings feed when sent and add delays to the setup of your account***

Please follow step #16 below to verify when your JSTOR collections have been activated.

## Collection-specific preferences and enabling MARC delivery

- 16) 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 are as follows:

| Collection  | Provider | Account Number | Created                 | In My Ho  |
|---|----------|----------------|-------------------------|---|
| <a href="#">Books at JSTOR All Purchased</a><br><small>Customizable</small>   | JSTOR    |                | 8/1/2013, 5:28:24 PM    | <input checked="" type="checkbox"/> Held by my library (55,179 / 55,179) Titles<br><a href="#">De-select Collection</a> |
| <a href="#">Books at JSTOR Demand Driven Acquisitions</a><br><small>Customizable - Demand Driven Acquisitions</small> | JSTOR    |                | 1/27/2014, 11:02:19 AM  | <input checked="" type="checkbox"/> Held by my library (55,179 / 55,179) Titles<br><a href="#">De-select Collection</a> |
| <a href="#">Books at JSTOR Evidence Based Acquisitions</a><br><small>Customizable</small>                             | JSTOR    |                | 10/11/2016, 11:42:23 AM | <input checked="" type="checkbox"/> Held by my library (21,430 / 21,430) Titles<br><a href="#">De-select Collection</a> |
| <a href="#">Books at JSTOR Open Access</a><br><small>Customizable</small>   | JSTOR    |                | 10/11/2016, 11:46:25 AM | <input checked="" type="checkbox"/> Held by my library (79 / 79) Titles<br><a href="#">De-select Collection</a>         |

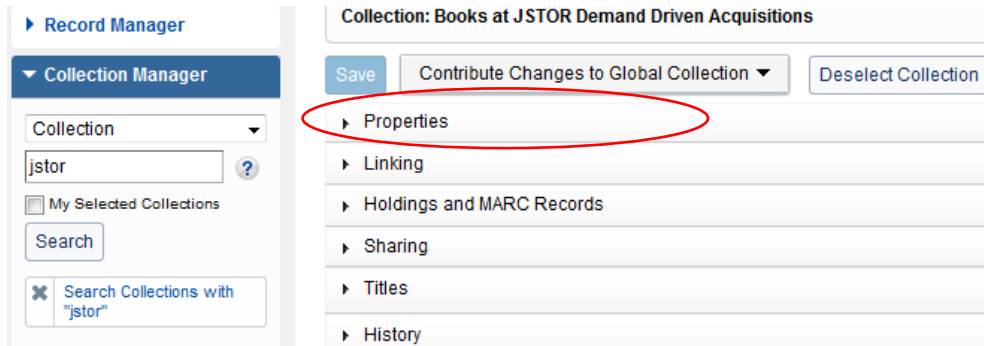
The collections to which your library subscribes will appear in the right pane.

Depending upon your library's acquisitions model with JSTOR, “Books at JSTOR Open Access”, “Books at JSTOR All Purchased”, “Books at JSTOR Demand Driven Acquisitions”, and/or “Books at JSTOR Evidence Based Acquisitions” will appear in the results as selected, or “held”, collections. (If none of the Books at JSTOR collections in the search results are selected, then OCLC hasn't finished loading your holdings feed from JSTOR. Please check daily until the expected collections display as selected in the search results. Remember: If a Books at JSTOR collection appears in the search results but indicates that it is not selected, or “held”, by your library, then do not manually select it unless explicitly directed to do so by JSTOR.)

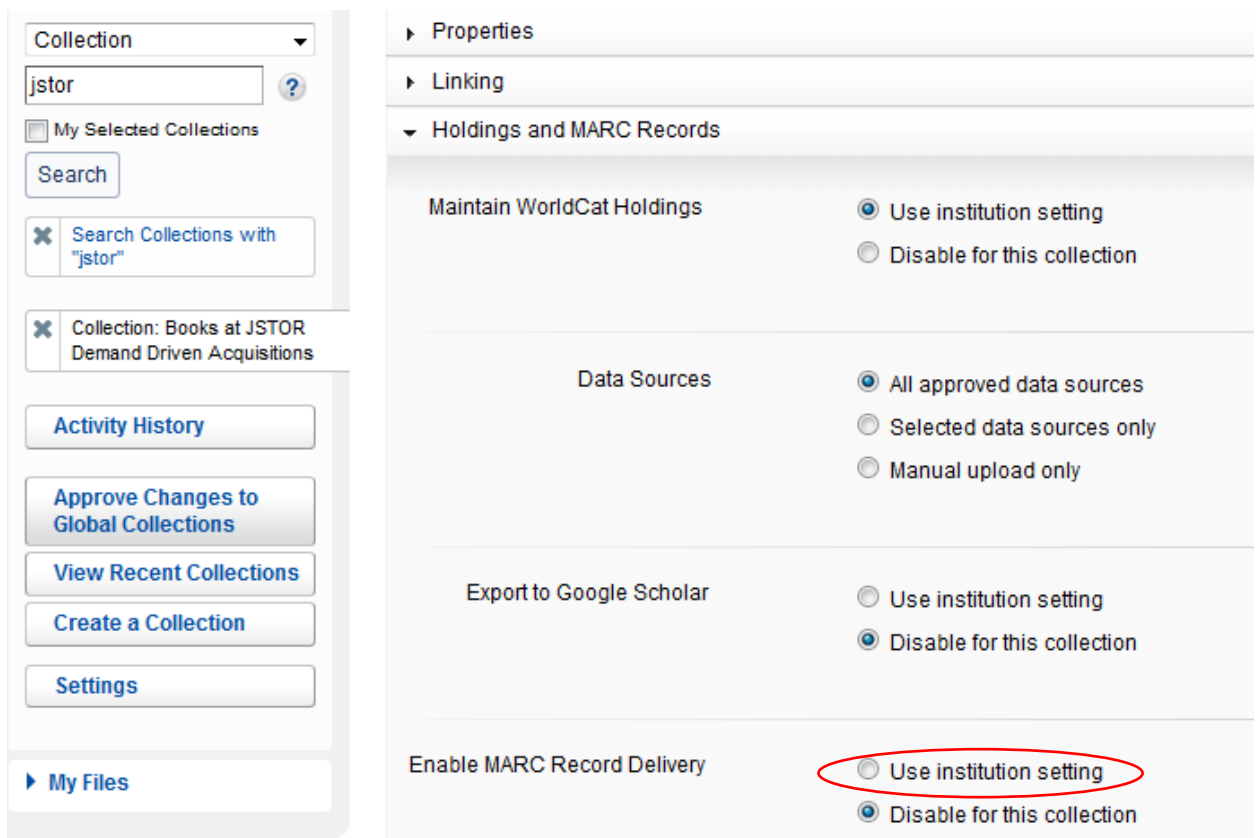
Click on the name of the collection that has been automatically selected and whose setting you wish to modify.



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



18) Options will then expand.



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

19) More options will expand.

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

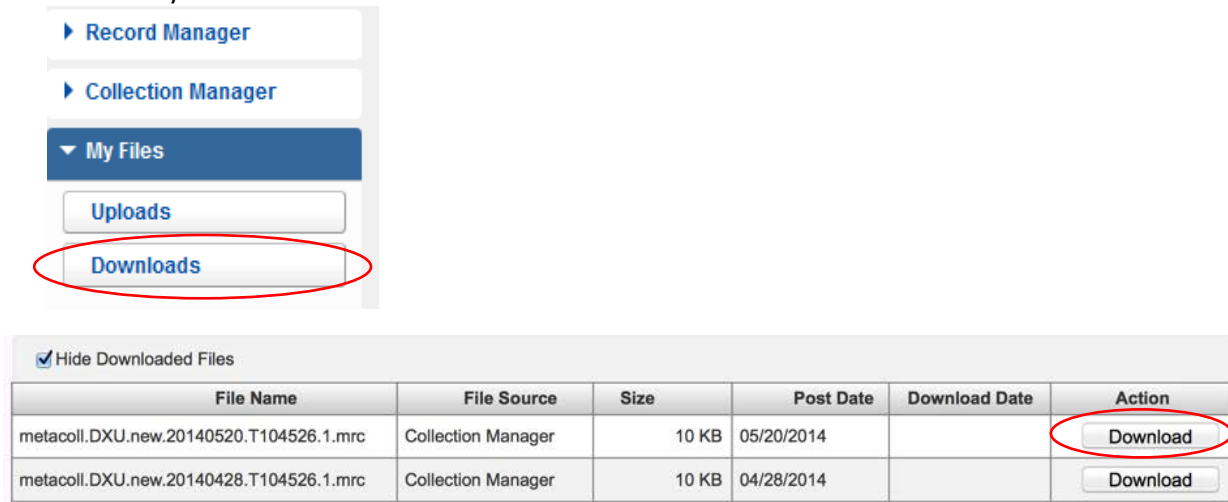
Note: You may wish to have your records delivered in separate files according to collection(s). You can do this by defining a filename segment that clearly identifies to you the specific collection such as:

The text that you specify in this field will be inserted into the delivery file name so that you can easily identify it as a file containing records for that collection. You may specify file name segments for each of the Books at JSTOR collections in which you participate by accessing each of the relevant collections and specifying the desired file name segment for that collection.

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

## Downloading MARC files

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



The screenshot shows the WorldShare interface. On the left, there is a navigation menu with three items: 'Record Manager', 'Collection Manager', and 'My Files'. The 'My Files' item is expanded, showing two sub-items: 'Uploads' and 'Downloads'. The 'Downloads' item is circled in red. Below the menu is a table with the following columns: 'File Name', 'File Source', 'Size', 'Post Date', 'Download Date', and 'Action'. The table contains two rows of data. The 'Action' column for both rows contains a 'Download' button, which is circled in red.

| File Name                               | File Source        | Size  | Post Date  | Download Date | Action   |
|---|--------------------|-------|------------|---------------|----------|
| metacoll.DXU.new.20140520.T104526.1.mrc | Collection Manager | 10 KB | 05/20/2014 |               | Download |
| metacoll.DXU.new.20140428.T104526.1.mrc | Collection Manager | 10 KB | 04/28/2014 |               | 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>).

## 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 collection manually unless explicitly directed by JSTOR.** 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.*

## **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>

### **JSTOR support page:**

<http://www.oclc.org/support/services/content-providers/jstor.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 "Settings" in the left-hand navigation pane, and then click "WorldCat Holdings". Make sure that the radio button for "Yes" is selected.

Click "Save" in the upper left of the pane.

The screenshot shows a web interface with a top navigation bar containing tabs for '387', 'Metadata', 'Acquisitions', 'Licenses', 'Circulation', 'Interlibrary Loan', 'Analytics', and 'Admin'. On the left side, there is a 'Record Manager' section with a 'Collection Manager' sub-section. The 'Collection Manager' includes a 'Collection' dropdown, a search box, a checked 'My Selected Collections' checkbox, and a 'Search' button. Below this are buttons for 'Activity History', 'Approve Changes to Global Collections', 'View Recent Collections', and 'Create a Collection'. The 'Settings' button at the bottom of this pane is circled in red. The main content area is titled 'Settings' and features a 'Save' button. A list of settings includes 'OCLC Symbol', 'Knowledge Base Data', and 'WorldCat Holdings', which is circled in red. Under 'WorldCat Holdings', there is a heading 'Maintain WorldCat holdings for knowledge base titles.' and a 'Maintain Holdings' section with two radio buttons: 'Yes' (selected and circled in red) and 'No'. To the right of the 'Yes' radio button, it says 'Your symbol is [OCWMS](#)'. Other settings listed at the bottom are 'Proxy and Authentication', 'Provider Settings', and 'Sharing'.

## 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, as well as your current editing preferences, if any.

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 |
|                   | <input type="radio"/> Yes                               |
|                   | <input checked="" type="radio"/> No                     |

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