WorldShare® Collection Manager:
What it is and how libraries use it
Class Handout

WorldShare Collection Manager

Automates delivery of WorldCat records and maintenance of WorldCat holdings for your library's electronic and print materials

How to use it:
- You want your users to have timely access to the electronic materials in your library.
- You want to maintain WorldCat holdings for your library's electronic and print materials.
- You want to streamline metadata management for your library's electronic resources.
- You want to share library's electronic content with other libraries.
- You want to receive updated records based on changes to the WorldCat record.
- You want to make your government documents available for quicker discovery.

More information:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager

To get started:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Get_started/Create_a_Collection_Manager_account

Types of Collections

WorldCat updates

Automates delivery of updated records based on changes to WorldCat records

How to use it:
- While cataloging, you export a less-than-full level record to make materials available sooner and want to get upgraded records when they become available.
- You have profile your cataloging partner collections to accept less-than-full level records and want to automatically get upgraded records when they become available.
- You want to automatically receive records in which a field has been added or updated.
- Titles have changed, have been added, or have been removed from your library's knowledge base collections.

Considerations:

Questions	Answers
If I use WorldCat updates, how do I apply the updated records from OCLC to the records for the same items already in my ILS (local catalog)?	Your ILS may call this process something like "overlaying" or "replacing" records. Consult with your systems librarian or ILS vendor's support staff to determine what your system uses as a "match point" for this process: ISBN, OCLC number, LCCN, etc.
I am concerned that when we load these records into our ILS, we will lose local edits.	Consult with your systems librarian or your ILS support staff to see if there's a way to "protect" specific fields when you overlay records.

Documentation:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/WorldCat_updates

Training:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Training

WorldCat query collection

Automates delivery of WorldCat records based on defined WorldCat search indexes

How to use it:
- You want records for all your library's print serials.
- You want records for all new titles cataloged in WorldCat to add to a shared catalog.
- You want records for new titles added to an open access collection to add to your local catalog.
- You want records for multiple OCLC symbols.
- You want records for all your library's holdings in WorldCat.

Documentation:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Query_collections

Training:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Training

WorldCat cataloging partner collection

Automates delivery of WorldCat records for titles your library has purchased from materials vendors

How to use it:
- You want to get materials to your users more quickly.
- You want to reduce time staff spends searching for and editing records and handling materials.
- You want to make your materials visible on the Web by having holdings attached to records automatically.
- You purchase materials from these participating material providers

Considerations:

Questions	Answers
I am not sure if my material provider participates	See participating material providers list at https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Cataloging_partner_collections/About_cataloging_partner_collections_in_Collection_Manager/Material_providers
I am not sure if records using cataloging partner collection will work in my ILS	If you are currently loading records from Connexion into your ILS, you should be able to load cataloging partner collection records using the same procedures.
We need to add local acquisitions data to records. We have special requirements for the formatting of Dewey call numbers	WorldCat cataloging partner collection provides profiling options for local data and call numbers.
My staff is concerned about their work changing, or about their jobs being replaced.	When WorldCat Cataloging Partners takes care of routine copy cataloging, staff can be trained for more responsible, creative work they've wanted to do but haven't had time for, such as managing data in your ILS, cataloging your unique local materials, authority control projects, digitization projects, etc.

Documentation:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Cataloging_partner_collections

Training:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Training

WorldCat data sync collection

Automates adding, changing, and removing of holdings information on large number of records

How to use it:
- Your library is new to OCLC and you want to add records from your library's catalog to WorldCat.
- Parts of your library's holdings information have never been added to WorldCat.
- Your library's holdings in WorldCat are out-of-sync with its local catalog.
- Your library has not consistently added or deleted holdings in WorldCat.
- You need to add holdings to WorldCat for bibliographic records your library obtains from other sources.
- You need to efficiently delete your library's holdings on a regular basis as part of ongoing weeding of your library's materials.
- You want to add original bibliographic records to WorldCat that you have cataloged only in your library's local catalog.
- You want to add or update local holdings records (LHRs) in WorldCat.
- You want to register your library's shared print retention commitments.

Documentation:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Data_sync_collections

Training:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Training

WorldCat knowledge base collection

Makes electronic content easier to find, use, share, and manage

How to use it:
- You want your users to have quicker and easier access to your electronic materials.
- You want to make it quicker and easier to lend your electronic materials.
- You want to keep your library's holdings for electronic serials up-to-date in WorldCat.
- You want to provide more direct access to your full text content.
- You are a depository library and want to provide up-to-date records for U. S. government documents.
- You want to share your library's data of electronic materials with peer libraries.
- You want to manage your Demand-Driven Acquisition (DDA) titles.

Documentation:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/Knowledge_base_collections

Training:
https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Training