Configuring WorldShare Collection Manager – Quick Reference for getting records for LLMC Digital

Step 1: Configure Institution-level settings
Step 2: Select Collection LLMC digital
Step 3: Configure MARC delivery for collection
Step 4: Pick up first set of records
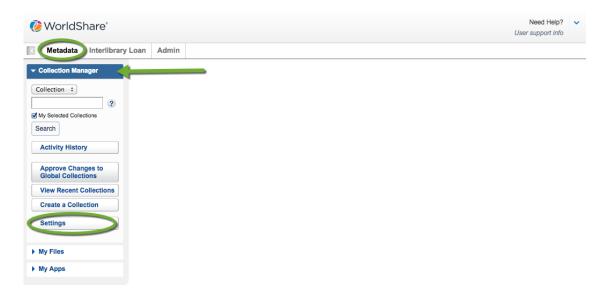Step 5: Turn on Maintain Holdings in WorldCat

STEP 1: Configure Institution-level settings

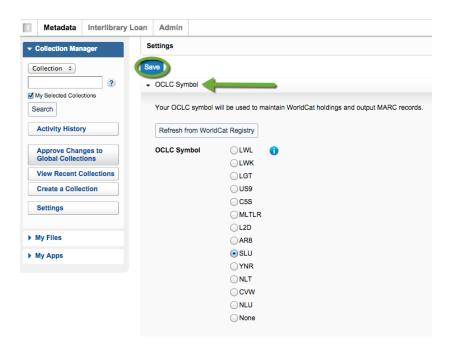Log into WorldShare – https://[yourlibrary].share.worldcat.org/wms/

Click on the **Metadata** tab in the upper left-hand corner of the screen.

Expand the **Collection Manager** tab on the left-hand side of the screen to view the Collection Manager Interface.
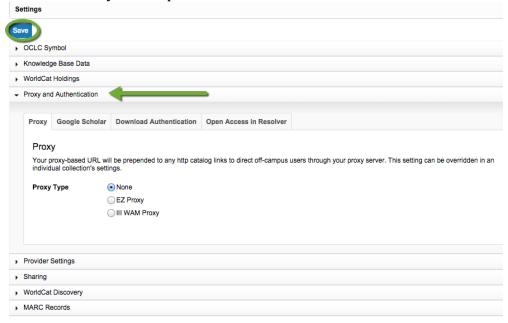
Click the **Settings** button.
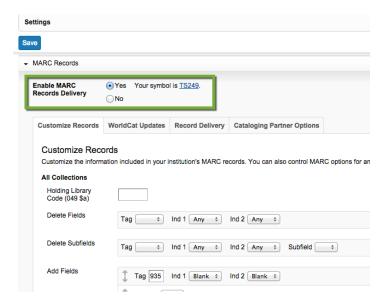
![WorldShare Collection Manager]

Expand the **OCLC Symbol** accordion, and select your institutions OCLC symbol. Remember to click the save button.

If your library uses a proxy for remote access, expand the **Proxy and Authentication** accordion, and select the type of proxy used by your institution. If you use EZ Proxy, enter your base URL in the form where it says "Base URL." If you use III WAM Proxy, enter your hostname in the "hostname" field. The proxy will be pre-pended to the 856 fields of the MARC records when they are output.

![WorldShare Collection Manager]

Expand the **MARC Records** accordion, and select **Yes** to receive MARC records. Notice the four tabs that appear in this section when **Yes** is selected, **Customize Records**, **WorldCat Updates**, **Record Delivery**, and **Cataloging Partner Options**.

For more information on the **MARC Records** accordion within the **Institution-level settings,** see**:**
http://www.oclc.org/support/help/collectionmanager/Default.htm#settings/record_settings.htm

Libraries may wish to receive **Reports**. Collection Manager can report on MARC records you output via Collection Manager and Holdings you set in WorldCat via Collection.

Detailed information on Reports can be found here:
http://www.oclc.org/support/help/collectionmanager/Default.htm#settings/reports.htm

STEP 2: Select Collection LLMC digital

With the "My Selected Collections" box **unchecked**, type "LLMC" into the search field and click **Search**.

Click the "Select Collection" button. The collection will then indicate that it has been locked for re-indexing. It may take up to an hour for the collection to re-index. Note also that the collection may appear to have re-indexed, but going into the collection will indicate that the

collection is still re-indexing. The collection has finished re-indexing when a title count appears, and the message, "This collection is currently locked for re-indexing. Changes to the selections inside of it cannot be made until the previous action is collection" disappears. You will also see a "Deselect Collection" button appear next to **Contribute Changes to the Global Collection** at the top of the collection.

NOTE: Once selected, the "My Selected Collections" box can remain checked when searching for the LLMC collection.

STEP 3: Configure MARC delivery for the collection

For more information on collection-level settings, see:
http://www.oclc.org/support/help/collectionmanager/Default.htm#create_a_collection/knowledge_base.htm

Once the collection has finished re-indexing, click on the name of the collection to reveal collection-level settings.

Expand the **Holdings and MARC Records** accordion.

In the section where it says **Enable MARC Record Delivery**, select **Use institution setting**. A new section will appear in this area.

If the library would like records delivered at a different delivery frequency than their institution level configuration, they can **specify delivery frequency for this collection.**

It is also recommended that libraries configure the collection to output files into a separate file. In the **Delivery File Output** section, select **Deliver records for this collection in a separate file**. A field will appear that will allow you to give the collect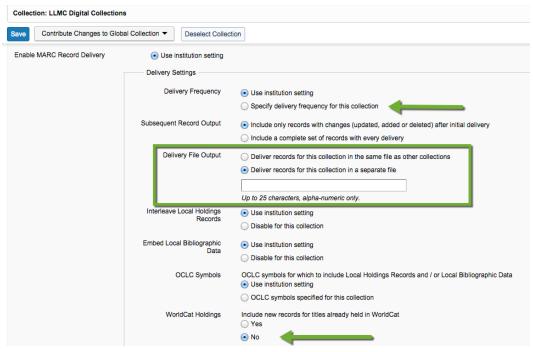ion a name that will be appended to the record filename. The files output from this collection will follow this format: metacoll.AAA.updates.D20141125.T240523.**SeparateFileName**.1.mrc

Before attaching the institution symbol to titles in WorldCat, it is best practice to have an initial set of records for the collection output. The **WorldCat Holdings** filter can be used to deliver records from the LLMC3 collection that do not yet have the institution symbol set in WorldCat. Once records have been output, the library can set holdings in WorldCat on titles in the LLMC3 collection without having to worry about receiving duplicate records to which their institution symbol is already attached.
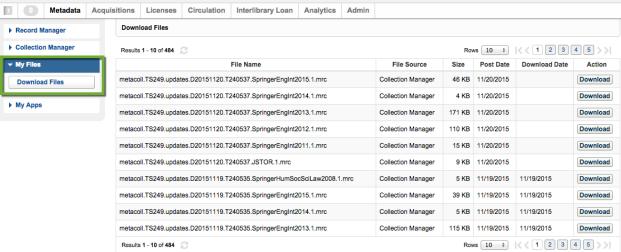
In **WorldCat Holdings**, select **No** for **Include new records for titles already held in WorldCat**. This setting works in conjunction with the institution-level setting **Maintain WorldCat Holdings** to block records from being delivered if the library's holding symbol is already set on the record. **NOTE**: if holdings are maintained in WorldCat at the institution level, and this setting is configured to **No**, then Collection Manager **will not output records at all** because it will see that all titles are already held in WorldCat.

See STEP 5 for information on maintaining holdings in WorldCat at the institution level.

Don't forget to save!

STEP 4: Pick up first set of records

On left-hand side of the interface is a tab called **My Files**. Expand the **My Files** tab and click the **Download Files** button. When files are output, they will be displayed in this area. If you output your records for the collection in a separate file, look for the name appended on the end of the file. Files will appear in this area for 90 days.
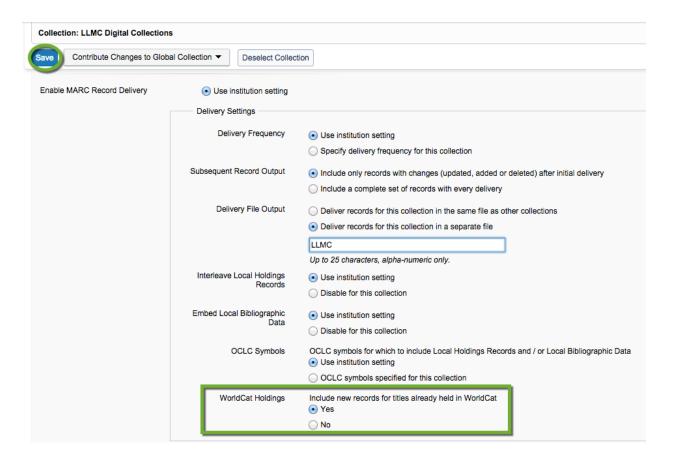
File Name	File Source	Size	Post Date	Download Date	Action
metacoll.TS249.updates.D20151120.T240537.SpringerEngInt2015.1.mrc	Collection Manager	46 KB	11/20/2015		Download
metacoll.TS249.updates.D20151120.T240537.SpringerEngInt2014.1.mrc	Collection Manager	4 KB	11/20/2015		Download
metacoll.TS249.updates.D20151120.T240537.SpringerEngInt2013.1.mrc	Collection Manager	171 KB	11/20/2015		Download
metacoll.TS249.updates.D20151120.T240537.SpringerEngInt2012.1.mrc	Collection Manager	110 KB	11/20/2015		Download
metacoll.TS249.updates.D20151120.T240537.SpringerEngInt2011.1.mrc	Collection Manager	15 KB	11/20/2015		Download
metacoll.TS249.updates.D20151120.T240537.JSTOR.1.mrc	Collection Manager	9 KB	11/20/2015		Download
metacoll.TS249.updates.D20151119.T240535.SpringerHumSocSciLaw2008.1.mrc	Collection Manager	5 KB	11/19/2015	11/19/2015	Download
metacoll.TS249.updates.D20151119.T240535.SpringerEngInt2015.1.mrc	Collection Manager	39 KB	11/19/2015	11/19/2015	Download
metacoll.TS249.updates.D20151119.T240535.SpringerEngInt2014.1.mrc	Collection Manager	5 KB	11/19/2015	11/19/2015	Download
metacoll.TS249.updates.D20151119.T240535.SpringerEngInt2013.1.mrc	Collection Manager	115 KB	11/19/2015	11/19/2015	Download

For information on timing and how the files are named, see: http://oc.lc/FTPRetrieval
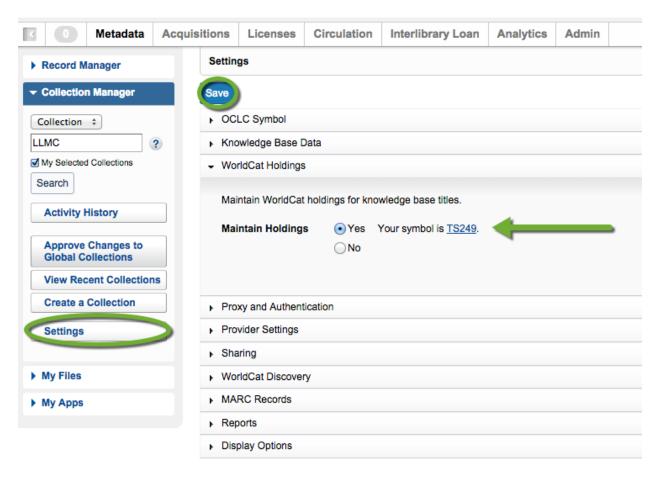
STEP 5: Turn on Maintain WorldCat Holdings

Once the first set of files for the collection have been delivered, change the **WorldCat Holdings** setting by going into the collection, expanding **Holdings and MARC Records**, and setting **WorldCat Holdings** to **Yes** to **Include new records for titles already held in WorldCat**.

Also, set the **Maintain WorldCat Holdings** to **Use institution setting** in the **Holdings and MARC Records** accordion. Going forward you will receive new, update and delete records when the collection is updated (or if you are setup to receive updates from WorldCat).

Lastly, to attach your library's holding symbol to all the titles in the collection, go into the institution-level settings, expand the **WorldCat Holdings** accordion, and select **Yes** to **Maintain WorldCat holdings for knowledge base titles**.

NOTE: This step assumes that the library is not already maintaining holdings in WorldCat at the institution level.

A note on "Holdings."

Collection Manager uses the phrase "held by" to refer to collections *selected* by the library. If you view collections you have selected in Collection Manager, you will see a green check and "**Held** by my library."

In Collection Manager, the only aspects that concern "WorldCat Holdings," i.e. having a title appear in WorldCat as being held by a library, come from the **WorldCat Holdings** accordion at the institution level and also **Maintain WorldCat Holdings** in the **Holdings and MARC Records** tab within collections (See step 3).

Finally, if you need additional assistance with Collection Manager, please contact CollectionManagerIM@oclc.org and the Implementation Manager for Collection Manager will assist you in getting setup for record retrieval.