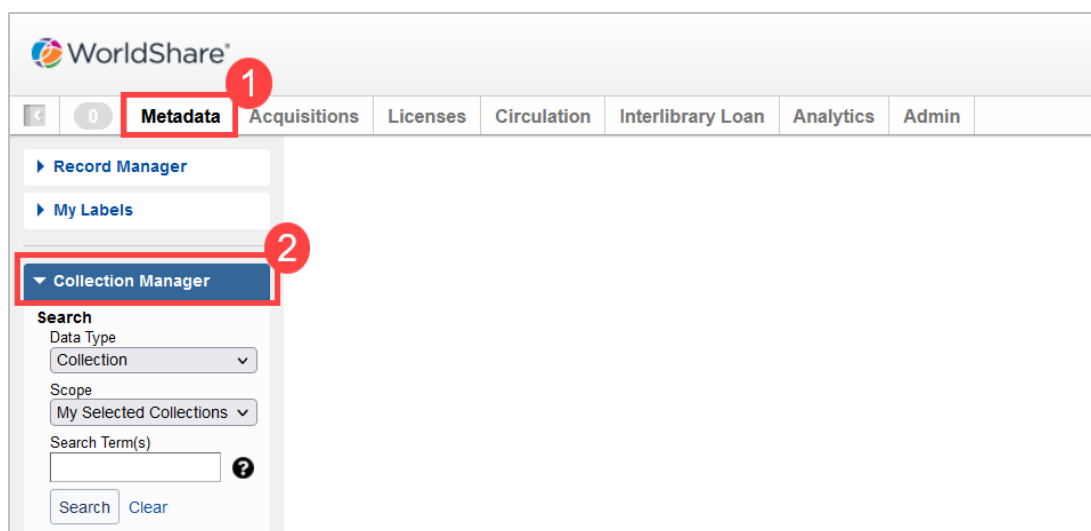


Edit WorldCat knowledge base collections with user interface

Class Handout

Login to WorldShare Collection Manager

- Login to WorldShare interface with your library's unique URL
<http://yourinstitution.share.worldcat.org/wms/>

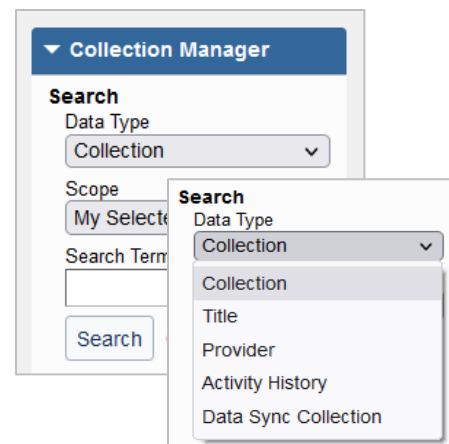


Browser compatibility chart: https://help.oclc.org/Librarian_Toolbox/Browser

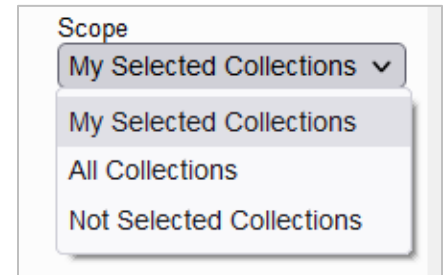
Search for collections, providers, or titles

Depending on the information that you have about your materials, you can search for collection, for provider, or for title

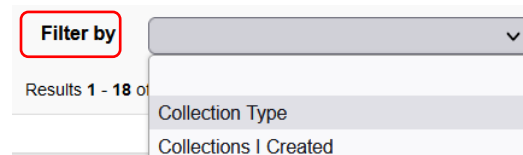
- Click **Collection Manager**
- Under Data Type, select:
 - **Collection**
 - **Title**
 - Can search OCLC number, ISBN number of the title, or ISSN of the title
 - **Provider**
- Activity History
- Data Sync Collection



- Option to leave the search box empty and limit search by **Scope**
 - My Selected Collections**—the search will return results with your library's collections
 - All Collections**—the search will return results from the global WorldCat knowledge base and any collections your library has created.
 - Not Selected Collections**—the search will return results with collections your library did not create or select



- Use **Filter by...** to refine search results



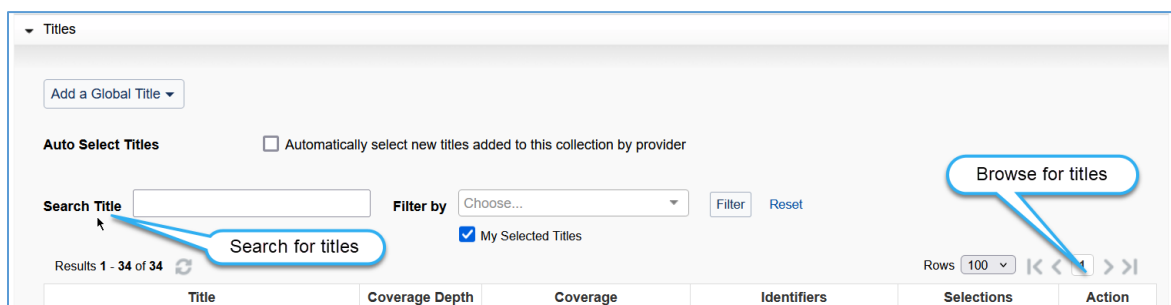
Select and edit knowledge base collection with user interface

1. Select an entire knowledge base collection

- Select an entire collection by clicking on **Select** next to the desired collection in the collection search results screen, *OR*
- Click on the collection name to open the collection
 - Click **Titles** accordion to open list of titles in the collection
 - Review title information for titles in the collection
 - Click **Collection Actions** menu, **Select Collection** to add holdings to all titles in the collection
- Auto Select Titles** option –if selected, this option automates the selection of new titles for your library when the provider adds new titles to this collection

2. Select a subset of titles in a knowledge base collection

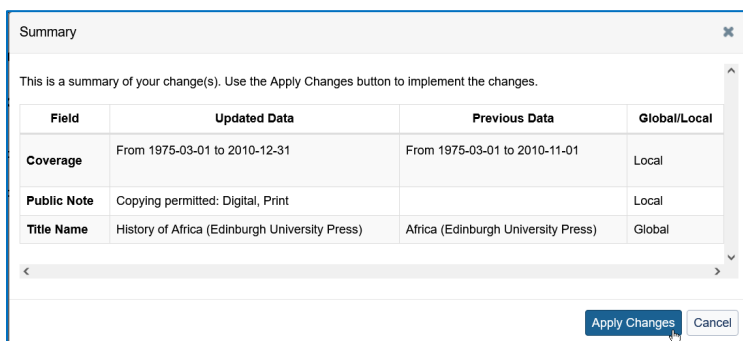
- Click on the collection name to open the collection
- Collection screen displays
- Click **Titles** accordion to open list of titles in the collection
 - Search for the desired title(s) using the **Search Title** box, *OR*
 - Browse for the desired title(s)



- Review the information for the desired title(s)
- Click **Select Title** next to each title to add holding to the title

3. Edit a title in a knowledge base collection

- Global vs. Local edits
 - **Global** changes made to a global field are applicable to all libraries (e.g., Title Name)
 - **Local** changes made to a local field are only applicable to the editing library (e.g., coverage information)
 - More information about global vs. local fields can be found here: [Edit global collections and titles](#)
- Once a title is selected, click the selected title to modify the appropriate information such as:
 - Title Name
 - Coverage information
 - Title URL, ISBN, ISSN, etc
 - Add staff and public notes
- Click **Review & Save** to see of summary of changes



Summary

This is a summary of your change(s). Use the Apply Changes button to implement the changes.

Field	Updated Data	Previous Data	Global/Local
Coverage	From 1975-03-01 to 2010-12-31	From 1975-03-01 to 2010-11-01	Local
Public Note	Copying permitted: Digital, Print		Local
Title Name	History of Africa (Edinburgh University Press)	Africa (Edinburgh University Press)	Global

Apply Changes Cancel

- Click **Apply Changes** to immediately save the changes or **Cancel** to return to the title for further editing

4. Add a title to a global knowledge base collection

Under **Titles** accordion:

- Click **Add a Global Title**
- Select **Create a Title**
- Enter the **Title** for the journal or e-book
- **Save** title

Create a new knowledge base collection with user interface

1: Create a database-only collection

Under Collection Manager:

- Click **Create a Collection**
- Select **Knowledge Base Collection**

- Check **database-only collection** (contains no titles)
- Click **Create**

2: Create a new local collection

Under Collection Manager:

- Click **Create a Collection**
- Select **Knowledge Base Collection**
- Click **Create**

New collection screen displays (Required fields marked with red asterisk (*))

- **Properties** accordion
 - Enter a **Collection name**
 - Use or change **Collection ID** (Note: needs to be unique)
 - Search for an existing **Provider** or **Create a Provider**
- **Linking** accordion
 - Enter **Collection URL** as appropriate
 - **Link scheme** – OCLC can create a link scheme for new knowledge base collection and add it here. Provide OCLC Support (support@oclc.org) with the following information:
 - Collection name, Collection ID, and Provider
 - Sample search from current provider to full-text
 - Username and password
- Click **Create** to add new collection

3: Add titles to a new collection

To add titles manually, choose **Create a title** from **Add a Local Title** menu:

- Enter the **Title** for the journal or e-book
- Choose appropriate **Coverage Depth**
- **Add Coverage** information, if needed
- Add **ISBN, ISSN, and/or OCLC number** as appropriate
- Other data as needed for title
- **Save** title

To add title by OCLC number, choose **Create Using OCLC Number to Pre-fill** from **Add a Local Title** menu

- Edit **Title** as needed
- Add additional **ISSN** or **ISBN** as appropriate
- Add **Coverage** information, if needed
- Other data as needed for title
- **Save** title

Deselect knowledge base collection and/or titles

Depending on the changes with your library's electronic resources subscriptions, you may need to periodically remove holdings from an entire collection or individual selected titles in a collection.

To **Deselect** an entire collection:

- Under **Collection Manager**, search for the collection
- Search results screen displays
 - Identify the chosen collection
 - Under **Selections**, click **Deselect**

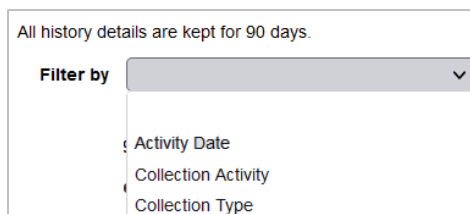
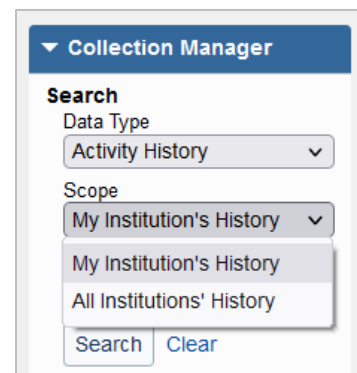
To **Deselect** individual titles in a selected collection:

- Under **Collection Manager**, search for the collection
- Search results screen displays
 - Identify the chosen collection
 - Click the collection title to display collection
 - Search for your chosen title(s)
 - Under **Selections**, click **Deselect Title**

Search activity history

Activity history shows activities from the last 90 days for knowledge base, query, and cataloging partner collections.

- Click **Collection Manager**
- Under Data Type, select:
 - **Activity History**
- Option to leave the search box empty and limit search by using **Scope**
 - **My Institution's History**—the search will return results related to only your library's activities
 - **All Institution's History**—the search will return results for all activities
- Use **Filter by...** to refine search results



Support and Resources

Community

- **Community Center**
<http://www.oclc.org/community/home.en.html>

Support & Training

- **Documentation**
[WorldShare Collection Manager](#)
- **Training** (includes instructor-led sessions, recordings, tutorials, and learning paths)
[WorldShare Collection Manager](#)

Contact Customer Support

- **United States:** 1-800-848-5800 or support@oclc.org
- **In your region:** <https://oclc.org/support>