

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

Checklist of questions and suggested collection type to use

Answering questions in this checklist will help you decide which types of collections in WorldShare Collection Manager are most effective for getting records and maintaining your library's holdings in WorldCat.

- WorldCat knowledge base
- WorldCat cataloging partner
- WorldCat data sync
- WorldCat query
- WorldCat updates
- Shared print registration

Questions	Collection type
<p>Do you create a large volume of original cataloging using your library's ILS rather than Connexion or Record Manager? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your library receive bibliographic records from a vendor, but needs to update its WorldCat holdings for these items? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you need to delete your library's holdings in WorldCat from more than a few hundred records at a time? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider setting up a data sync collection.</p>
<p>Are there parts of your library's holdings information that have never been set in WorldCat? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does WorldCat indicate that your library holds items that it no longer has? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you need OCLC control numbers for your library's local records? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider setting up a data sync collection.</p>
<p>Do you want to maintain your library's item-specific holdings for serials in WorldCat (for example, volumes and dates held)? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you want to add information about your library's lending and reproduction policies for specific titles in WorldCat to better target resource sharing requests? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you have MARC Format for Holdings Data records in your library's ILS that you can send to OCLC? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>OR</p> <p>Do you have patterned non-MARC holdings data?</p>	<p>If you answered Yes to most of these questions, consider letting OCLC maintain your local holdings records using data sync collection.</p>

Questions	Collection type
<p>Do you purchase part of your materials from one of the participating material providers listed at: Material providers for cataloging partner collections? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you download files of records from a Web site or receive files of records via OCLC file exchange delivery using SFTP? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you import files of bibliographic records into your ILS? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is staff time limited for timely and regular updating of holdings on individual records for new acquisitions? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using cataloging partner collection.</p>
<p>Do you have large electronic sets that need bibliographic records? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you download files of records from a Web site or receive files of records via OCLC file exchange delivery using SFTP? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you import files of bibliographic records into your ILS? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using knowledge base collection.</p>
<p>Does your library have electronic serials? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do you want to maintain WorldCat holdings for your electronic serials? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>OR</p> <p>Do you want to receive MARC records for your electronic serials? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to both of these questions, consider using knowledge base collection.</p>
<p>Is your library a regional or selective depository for U.S. government documents? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your library lack the resources to catalog federal documents? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you download files of records from a Web site or receive files of records via OCLC file exchange delivery using SFTP? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Can you import files of bibliographic records into your ILS? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to most of these questions, consider using the knowledge base collection.</p>
<p>Do you want to get records for all of your library's print serials? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your library want to get records on a particular subject or from a specific provider? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Do want records for all your library's holdings in WorldCat to add to a shared catalog? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider using query collection.</p>

Questions	Collection type
<p>Does your library want to get records for titles in which the WorldCat records have changed? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your library need full-level records to update records in its local catalog? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Is your library using WorldCat knowledge base to manage its electronic content and would like to get updated WorldCat records when titles have changed, have been added, or have been removed from these collections? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider using WorldCat updates.</p>
<p>Does your library want to register shared print retention commitments? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Does your group want to register shared print retention commitments? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>	<p>If you answered Yes to any of these questions, consider using Shared Print.</p>