Collection Manager rollout plan

Find a checklist of tasks necessary to perform in order to implement WorldShare Collection Manager.

- Submit [mapping file](#) for Alternative Service Provider mapping (Serial Solutions, SFX, EBSCO A-to-Z) (Optional).
  - If you are currently using a knowledge base to manage e-resources, you can have your old knowledge base mapped into the WorldCat knowledge base.

- Evaluate collections currently purchased/subscribed against what is [available in the global knowledge base](#).

- Setup [direct holdings feeds](#) for applicable collections.
  - A number of providers support direct holdings feeds, meaning they will send OCLC the data for your library-specific holdings, and OCLC will load that data to reflect those holdings in your local knowledge base.

- Select [applicable standard kb collections](#) in full.
  - For non-customizable collections to which your library subscribes in their entirety.

- Select [applicable standard kb collections](#) in part.
  - For customizable collections to which your library does not subscribe in their entirety.

- Create [custom collections](#) for collections/titles not represented in the global knowledge base.

- Configure [institution-level settings](#).
  - See settings checklist.

- [Turn on links](#) in Service Configuration.

- Enable [MARC record delivery](#) for collections (Optional).
  - Record delivery must be enabled both at the institution-level as well as within each collection for which records are required.

- Set [ILL deflection policies](#) (Optional).
  - Set up your ILL policies so that you do not receive requests for items you do not lend via ILL.

- [Pick up records/access FTP](#) (Optional).

- Understand the [A-to-Z list](#) (Optional).