Configure institution settings for query collections

Use this article to configure the minimum institution settings for query collections.

Configure institution settings

Institution settings
Configure the following settings:

1. OCLC Symbol

Verify that your OCLC Symbol is selected

Use the OCLC Symbol setting to verify that your institution's OCLC symbol is selected. Collection Manager uses the symbol displayed here to maintain WorldCat holdings and to output records.

To verify that your OCLC symbol is selected:

1. Navigate to Institution Settings > OCLC Symbol.
2. Select your OCLC symbol if it is available in the interface but is not selected. If your OCLC symbol is not available in the interface, follow the instructions to edit your information in the WorldCat registry.
3. Click Save.

Edit your information in the registry

Collection Manager uses information your institution's WorldCat registry profile. You can quickly review your institution's information by visiting the WorldCat registry website.

To edit your information in the WorldCat registry:

1. Sign out of WorldShare Collection Manager.
2. Sign in to OCLC Service Configuration. Navigate to the WorldCat registry module and select Identifiers. Update your information and save your changes. Sign out.
3. Sign in to WorldShare Collection Manager.
4. Click the Refresh from WorldCat Registry button, preview the changes, and click Accept changes. Click Save.

2. Reports > Records Reports

Enable emailed records reports

If you enable reports in Institution Settings > Reports, reports will be available via email around the time
when files of records have been output and/or after there are changes to your holdings in WorldCat. When your first report is available, you will get an email from Usage_Statistics@oclc.org with the subject field: "The report [name of report] you requested for [YYYYMMDD]."

You will not receive an email on days when there is no activity. Reports are also available in the OCLC Usage Statistics Portal and they are identical to the reports that come by email. See how to access reports in the
OCLC Usage Statistics Portal.

To receive emailed reports:

1. Navigate to Institution Settings > Reports.
2. Select Yes to Receive Email Reports.
3. Enter your cataloging authorization or an admin code. This is a 9-digit number starting with 100. Only one authorization code is needed per institution.
4. Expand and select the Report Types you want to receive.
   ◦ To find details about the content of each report type see Understand emailed reports.
5. Enter the Email Address(es) the reports will be sent to. If you are adding more than one email address, separate each email address with a semi-colon (;).
7. Click Save.

There is not a way to select only certain reports per email. The email address(es) entered will receive all selected reports.

Many libraries that have collections that output records on an ongoing basis select the Updated Records report. The report will notify you of critical changes like OCLC number merges and the reason you received an updated record even if you have not enabled WorldCat updates.

For a complete list and details about institution settings, see Collection Manager Institution settings.

Configure institution record settings

Enable MARC Records

Use the MARC Records setting to enable record delivery. Note that collection-level record delivery settings will remain disabled. You will need to enable record delivery within your collections before records will be delivered.

To enable record delivery in the institution settings:

1. Navigate to Institution Settings > MARC Records.
2. Select Yes for Enable MARC Record Delivery.

Once you enable record delivery, tabs of settings to customize your records will appear. The settings in these tabs apply across all collections and records you output from Collection Manager. To customize your records, complete the settings in each tab relevant for your collection types: Customize Records, WorldCat Updates, Record Delivery, Cataloging.
Partner Options.

**Customize Records**

**All Collections**

**Holding library code (049 $a)**

Leave the field blank or to enter a four-character code. Use any holding library code that you want mapped to the 049$a of all of your records.

**What is a holding library code?**

A holding library code is a four-character code that identifies a location, collection, category of material, or a library branch. For example: MAIN

**Delete Fields**

To delete fields from your records:

1. Select a Tag and Indicators from the drop-down lists.
2. Use the add button (+) to add another field.

**See the tags available from the drop-down list**


**Delete Subfields**

To delete subfields from your records:
1. Select a Tag and Indicators from the drop-down lists.
2. Select a Subfield from the drop-down list.
3. Use the add button (+) to add another field.

See the tags available from the drop-down list


Add Fields

Use the Add fields area of the Customize Records tab to map data elements to your records. Map all data elements you need in records from any of your collections in this single profile area. Record customizations apply across all records you receive from Collection Manager. See the default values in records from Collection Manager.

To add fields:

1. Enter a Tag, Ind 1, and Ind 2 or leave them blank.
2. Enter a Subfield.
3. Choose from the Data values in the Value drop-down list to map the associated data to your records.
4. If desired, nest multiple values under a single subfield or multiple subfields under a single tag:
   a. Use the add button (+) to add another value to the subfield.
   b. Alternatively, use the add button (+) to add an another subfield to the tag and then choose a value.
5. If you would like to add another tag, use the add button (+) to add another field and enter a tag.

Knowledge Base Collection 856 Field

Does not apply: Knowledge Base Collection 856 Field settings do not apply to query collections.

WorldCat 856 Field

WorldCat 856 Field settings apply to query collections, cataloging partner collections, and WorldCat updates.

For records from query collections, cataloging partner collections, and for WorldCat updates, Collection Manager will retain all of the URLs from the master WorldCat record. If you enter domains in the 856 field customization settings, Collection Manager will retain only the URLs that match the domains you define. If a title with the same OCLC number is in one of your knowledge base collections, we will use the 856 field from your knowledge base, not from the WorldCat
To see examples of the WorldCat 856 field in records, see 856 field processing in records.

How to complete the WorldCat 856 Field settings

To limit the URLs in your records to those from the master WorldCat record that match specific domains:

1. Enter in the Retain 856 Fields with these Domains field one or more domains you would like retained from the URLs in master WorldCat records.
   Example: http://site.ebrary.com
   Example (Wiley): http://dx.doi.org/10.1002
2. The domains you enter will apply to any records output from query collections, cataloging partner collections, or for update records for your WorldCat updates.
   Collection Manager will look for an exact text match at the beginning text of URLs in 856$u. If a domain you enter does not match any URL in the master WorldCat record, then all of the URLs 856 will be retained in your record. If a domain you enter matches multiple URLs, then any URLs that match the domain will be retained in your record. If you enter multiple domains, the system will look for any of those domains in the records.

To delete subfields from your records:

1. Choose a subfield from the drop-down list if you would like to delete the 856 subfield from the WorldCat Master record for all of your query collections, cataloging partner collections, and WorldCat updates.
2. Click Save.

To add a subfield and a value (such as free text) to 856 fields:

1. Click the plus sign to add a field.
2. Within Add Subfields, choose a subfield from the drop-down list.
3. Select the value Enter Free-Form Text or Transaction Type from the drop-down list.
4. If you chose Enter Free-Form Text, a text box will appear. In the text box, type any text you would like. For example, Click here for access.
5. If you would like to add another field, click the plus sign.

Local Data

You have the option to have Local Holdings Records (LHRs) interleaved with your records and/or to have Local Bibliographic Data (LBD) embedded in or interleaved with your records.

Caution: When including local holdings records (LHRs) to records, you must select MARC 21 with MARC-8, MARC-21 with UTF-8 Unicode, or MARCXML with UTF-8 Unicode in the Record Delivery tab.

Include LHRs

To include LHRs:

1. Select Include my local holdings records.
2. Select from the drop-down list a delivery method. Options include:
   - **Deliver a file of local holdings records only**
     You will receive a file of local holdings records only. The file name will include "lhr" as follows: metacoll.XXX.new.lhr.D20160213.T042239.1.mrc
   - **Deliver a file of local holdings records and a file of bibliographic records**
     You will receive local holdings records and bibliographic records in separate files.
   - **Deliver a file of local holdings records interleaved with my bibliographic records**
     You will receive each bibliographic record followed by its associated LHR(s). Updated bibliographic records and their interleaved LHRs will be output if any associated LHR is deleted, added, or updated. You will receive an updated record and all associated LHRs, including those that have not changed. This allows you to replace all LHRs for a record without the need to figure out what has been changed. Note: Local bibliographic data will not be included.

3. Enter your **OCLC Symbol(s)**. If you have multiple OCLC symbols, separate each symbol with a space.

**Include LBD**

**To include LBD:**

1. Select **Include my local bibliographic data**.

2. Select from the drop-down list how you would like your LBD included with your records. Options include:
   - **Embedded with my bibliographic records**
     Select if you want local bibliographic data, such as subjects and notes, embedded in your records.
   - **Interleaved with my bibliographic records**
The option to have LBD Interleaved with records is useful for libraries that need to determine which metadata is local and which is coming from the WorldCat master bibliographic record.

3. Enter your OCLC Symbol(s). If you have multiple OCLC symbols, separate each symbol with a space.

WorldCat Updates

(Optional) Enable WorldCat update records

Update Option

Use the settings in Institution Settings > MARC Records > WorldCat Updates to configure whether or not you receive updated records based on changes to the master record in WorldCat. By default, records will not be output when the WorldCat master record is enhanced.

For information about merged records, please see About WorldCat Updates.

<table>
<thead>
<tr>
<th>UPDATE OPTION</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>None (Default)</td>
<td>For collections that can output records on an on-going basis, you will receive updated records for OCLC number merges, when there are URL changes, and when an essential change to knowledge base data is made.</td>
</tr>
<tr>
<td>Knowledge base and query collections</td>
<td>In addition to the above, you will receive updated records when master records are enhanced for titles in your knowledge base and in ongoing query collections.</td>
</tr>
<tr>
<td>Knowledge base, query and data sync collections and WorldCat holdings</td>
<td>In addition to the above, you will receive updated records when master records are enhanced for your holdings in WorldCat (i.e., holdings you set via Collection Manager or via another service). If you select this Update Option, a field will appear to enter your library's OCLC symbol. If you enter multiple OCLC symbols, you will receive one set of records. Note: You have the option in Institution Settings &gt; MARC Records &gt; Record Delivery to have updated records for your holdings in WorldCat output in a separate file.</td>
</tr>
</tbody>
</table>

Update Conditions
The following setting will be visible if you select an option to receive WorldCat Updates. Use the setting to select what types of changes should trigger an updated record.

<table>
<thead>
<tr>
<th>UPDATE CONDITIONS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Receive updates for any change to the WorldCat master record</td>
<td>If you select this option, you will receive updated records any time a WorldCat master record changes. Note that you might receive large numbers of updated records.</td>
</tr>
<tr>
<td>Receive updates for selected criteria <em>(Recommended)</em></td>
<td>If you select this option, settings to define the types of enhancements that will trigger the output of an updated record will appear. The system will look first at your including criteria to determine if a record should be considered for delivery. Next, it will remove any records based on your excluding criteria and deliver the remaining updated records.</td>
</tr>
</tbody>
</table>

**Include**

Including conditions define the changes to the WorldCat master record that will trigger output of an updated record. Default settings are shown below. Change the default criteria if desired.

**Field Changes in Master Record**

Enter the tags and indicators for which you will receive an updated record when they are added, updated or deleted in the WorldCat master record.

Add additional criteria, edit or delete the default values. Default values:

- 1XX with no indicator values specified (Any) - This applies to all 1XX tags and gives you any updates to 1XX tags
- 505 with no indicator values specified (Any) - This gives you any updates to the 505 tag
- 650 with no indicator values specified (Any) - This gives you any updates to the 650 tag
- 7XX with no indicator values specified (Any) - This applies to all 7XX tags and gives you any updates to 7XX tags

**Encoding Levels Changes**

By default, all of the levels are selected. Choose specific encoding levels to have update records delivered when an encoding level changes to those values:

- Blank
- 5
- 1
- M
- 1
Other Changes

By default, neither option is selected. Choose to trigger an update if the:

- Date/Publication Status (DtSt) changes
- 040 changes to include 040 $e rda (which represents that the record has been upgraded to RDA standards)

Exclude

Excluding conditions define criteria to reduce the number of updated records received. All are disabled by default.

Exclude Material Types

By default, none are selected. Select specific material types to exclude them from your update records:

- Books
- Maps
- Sound recordings
- Computer files
- Mixed materials
- Visual materials
- Continuing resources
- Scores

Exclude Electronic Resources

By default, none are selected. Select electronic resources to exclude from your update records.

<table>
<thead>
<tr>
<th>Online</th>
<th>o = Online. The resource is accessed by means of hardware and software connections to a communications network.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct electronic</td>
<td>q = Direct electronic. Storage is on a directly accessible tangible recording medium, e.g. disc, tape, Playaway device, flashdrive, portable hard drive, etc. Do not use code q for items that do not require the use of a computer (e.g., music compact discs and videodiscs).</td>
</tr>
<tr>
<td>Electronic</td>
<td>s = Electronic. Item is intended for manipulation by a computer. The item may reside in a carrier accessed either directly or remotely. The item may also require the use of peripheral devices attached to the</td>
</tr>
</tbody>
</table>
computer (e.g., a CD-ROM player). Do not use codes for items that do not require the use of a computer (e.g., music compact discs and videodiscs). Codes o and q are preferred to separately identify online and direct electronic resources. Whenever possible OCLC will convert instances of codes to either code o or q.

Exclude Publication Date

By default, no date is entered. Choose to not receive updates for older materials. For example, if you do not want updated records for materials that are 20 years old or older, you could specify:

- Do not deliver records for materials published in 1998 and before

Exclude Records Upgraded by my Library

By default, nothing is selected. To exclude from your update records any records that were upgraded by your library, select your library symbol(s).

Edit your OCLC symbol in the WorldCat Registry

Collection Manager uses information your institution's WorldCat Registry profile. You can quickly review your institution's information by visiting the WorldCat Registry website.

To edit your information in the WorldCat Registry:

1. Sign out of WorldShare Collection Manager.
2. Sign in to OCLC Service Configuration. Navigate to the WorldCat Registry module and select Identifiers. Update your information and save your changes. Sign out.
3. Sign in to WorldShare Collection Manager.
4. Navigate to Institution Settings > OCLC Symbol and click the Refresh from WorldCat Registry button, preview the changes, and click Accept changes. Click Save.

Record Delivery

(Optional) Change default record delivery settings

Format

MARC Records

Delivery Frequency

Does not apply: This setting applies to query collections set for ongoing delivery.

File Output

Does not apply: This setting does not apply to query collections. It does apply to WorldCat updates for your WorldCat holdings.
Uniform Resource Identifiers (URIs)

Links in records make resources more integrated with the Web and more discoverable for end users. If you select URI settings, linked data URIs will be embedded in your MARC records for 1XX, 6XX, 7XX and 8XX fields and will be included in the $0 subfield. $0 is a valid field for linked data URIs even if your ILS currently does not use the linked data information.

If you would like to download records with linked data URIs, select the identity service(s) from which you would like to retain links. If you select more than one identity service, multiple $0s will be appended to the appropriate tags with the appropriate URIs. The order of $0s will follow the order listed in the interface.

By default, none are selected:

Name Headings Identity Services

- GND Authorities - (Die Gemeinsame Normdatei, German)
- LC / NACO Authority File - (Library of Congress / Name Authority Cooperative Program)

Subject Headings Identity Services

- GND Authorities - (Die Gemeinsame Normdatei, German)
- LC Subject Authority File - (Library of Congress)
- MeSH Authorities - (Medical Subject Headings)

For more information about Authorities, see Authorities: Formats and indexes.

Cataloging Partner Options

Does not apply: Cataloging Partner Options only apply to cataloging partner collections in Collection Manager.

Watch a video

MARC Record Delivery: Institution Level Settings (22:22)

This video demonstrates how to enable MARC record delivery and configure institution-level settings for your collections in WorldShare Collection Manager.

Next steps

Now that you have configured institution settings for query collections, Create a query collection.