Collection-level settings in query collections

Properties

Collection Name (required)

Enter the collection name of your choice. Collection names can include special characters. However, note that searching for names with special characters might not work since some special characters are reserved for commands.

Collection ID (required; automatically assigned)

The Collection ID will be assigned by the system by default.

Provider

Enter a provider if desired. By default, the 590 $a will contain this value.

Description

Optional. Use this field to add a basic description of the collection for internal reference.

WorldCat Selection Criteria (required)

Enter WorldCat Selection Criteria to search WorldCat. Examples of typical queries:

am:blackwellreference AND yr:2011 AND mt:elc

se=early american imprints AND yr:1777 AND au:backus

Note:

- There is a 20,000 character limit for the WorldCat Selection Criteria.
- To ensure optimal performance, query collections are limited to 30 million records. If you want to create a query with over 30 million results, please contact OCLC Support to obtain the needed permission.

Tips and resources

Boolean operators must be entered in capital letters.
For example: **AND, OR, NOT**

If you need to use a "range of year" please use two dots ".." rather than a dash.

For example: **yr:2000..2013**

See [Searching WorldCat Indexes](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_indexes) for a complete list of indexes available for use in WorldShare.

Not all indexes are currently supported. For additional help, see a [concise table of available indexes](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_indexes).

**Examples of search strings**

**How to build a query for your library's holdings in WorldCat**

Use the holding library symbol "li:" and follow the index label and colon with your OCLC symbol. For example:

`li:[OCLC Symbol]`

**How to build a query for a specific format (serials)**

See [Searching WorldCat Indexes](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_indexes) and create a query that corresponds to a material type. Use `mt:` for material type. To return serials, use `ser`. For example:

`mt:ser`

To return serials that have a URL present in the 856 field, use the search string:

`mt:ser AND mt:url`

To search for titles with your holding symbol, add the holding library symbol label "li:" to your query and follow the holding library symbol and colon with your OCLC symbol.

`mt:ser AND mt:url AND li:[OCLC Symbol]`

**How to build a query for all print serials**

Here is an example of a query created by a library who wanted records for all print serials on which they have an OCLC symbol (replace `[OCLC Symbol]` with your OCLC symbol):


**How to build a query for titles added to WorldCat with WorldCat Digital Collection Gateway or CONTENTdm**

If you have added collections of digitized titles to WorldCat via the WorldCat Digital Collection Gateway or CONTENTdm, you can extract records by creating a query collection.

Use **DGCNT** for Digital Collection Gateway or **CNTNT** for CONTENTdm and add your OCLC symbol after `cs=` to create a query like one of the following (replace `[OCLC Symbol]` with your OCLC symbol).

`on:DGCNT AND cs=[OCLC Symbol]`
Collection Type

Choose a Collection Type for the delivery of records.

One-time delivery

Choose One-time delivery to receive a file of records for a WorldCat query collection once.

Ongoing delivery

Choose Ongoing delivery to receive records on an ongoing basis at the frequency you choose (Daily, Weekly, Monthly, or Quarterly). You will receive:

- New records as the records are added to WorldCat for titles that meet your WorldCat Selection Criteria
- Delete records when a WorldCat record changes so that it no longer meets your WorldCat Selection Criteria
- WorldCat update records when a master record is updated or enhanced

Notes

Enter a Public note if you mapped the Collection Level Data, Public Note value to your records in Institution Settings > MARC Records > Customize Records. Enter a Staff note if you want to save a note in the WorldShare interface and not expose it to patrons.

MARC Delivery Filters

This setting operates as a filter to limit the record output of a query collection based on specific criteria. The filtering options include: Filter by Process, Filter by Date Holdings Set, Filter by Date Bib Records Created, and Filter by Date Bib Records Updated. The filters allow you to limit by the process(es) that initially set holdings in WorldCat, the date range holdings were set, the date range the bibliographic record was created, and the date range the bibliographic record was updated.

Note: Once a query collection is confirmed and saved, MARC Delivery Filter selections cannot be modified.

Filter by Process

This filter limits the output of a query collection by specifying the process ID that initially set holdings in WorldCat. For example: You could limit record output to only those holdings set by Record Manager and Connexion to automatically receive records from online cataloging activities.

To enable the filter, check "Deliver records for holdings set by the following process(es) for these OCLC symbols" and choose one or more processes by which holdings were set. Your selections will change color to show they have been
selected.

Process(es):

- Collection Manager - Cataloging Partner
- Collection Manager - Data Synchronization
- Collection Manager - Knowledge Base
- Connexion
- Contract Services
- Digital Collection Gateway
- Record Manager
- WorldShare Management Services

Next, enter the OCLC symbol(s). Separate each OCLC Symbol with a space.

**Filter by Date**

**Date Holdings Set**
This filter limits the results of a query collection by specifying a set date range of when holdings initially were set on the bibliographic records.

To enable the filter, check "Deliver bibliographic records based on date or date range holdings were set." Select the **Start Date** and **End Date** for the date range to return in the Query results. Next, Enter the OCLC Symbol(s). Separate each OCLC symbol with a space.

**Date Bib Records Created**
This filter limits the results of a query collection by specifying the date range of when the bibliographic records were created.

To enable the filter, check "Deliver bibliographic records based on date or date range records were created." Select the **Start Date** and **End Date** for the date range to return in the Query results.

**Date Bib Records Updated**
This filter limits the results of a query collection by specifying the date range of when the bibliographic records were previously updated.

To enable the filter, check "Deliver bibliographic records based on date or date range records were updated." Select the **Start Date** and **End Date** for the date range to return in the Query results.
MARC Records

After you enable record delivery in the institution settings in Institution Settings > MARC Records, you must enable record delivery in your collection. Collection-level MARC record options will not be available until record delivery is enabled in the institution settings.

Enable MARC Record Delivery

Caution: The collection-level MARC record delivery options will not be available until you enable MARC record delivery in the institution settings.

- Use institution setting: [Your institution settings will be displayed here]
- Disable for this collection (default)

After you enable record delivery in the collection, you will see the following tabs of settings:

- Customize Records
- Record Delivery

Customize Records

Local Bibliographic Data

Leave the default setting or override institution settings for LBD. Settings:

- Use institution setting (default)
- Disable for this collection

Local Holdings Records

Leave the default setting or override institution settings for LHRs. Settings:

- Use institution setting (default)
- Disable for this collection

OCLC Symbols (for LHRs and local bibliographic data)

Leave the default setting or override the OCLC symbols you included at the institution level for LHRs and/or Local Bibliographic Data. Settings:

- Use institution setting (default)
- Use these OCLC symbols for LHRs and local bibliographic data
MARC Custom Text

If you mapped custom text to your records in the Customize Records tab, add collection-level text in the corresponding field(s).

If desired, use the Define Custom Text Labels button to change the text label from “Custom Text 1” to something more meaningful. See Collection Custom Text for more information.

Record Delivery

Delivery Frequency (Only available with ongoing delivery)

Leave the default setting or override the institution setting for Delivery Frequency. Settings:

- Use institution setting (default)
- Specify delivery frequency for this collection. Settings:
  - Daily (default)
  - Weekly
  - Monthly
  - Quarterly

If the same item/OCLC number is in multiple collections and the collections are set to different delivery frequencies, you could get the same record multiple times.

Subsequent Record Output (Only available with ongoing delivery)

Change the default setting if you want a complete set of records with every delivery. Settings:

- Include only records with changes (updated, added or deleted) after initial delivery (default)
  - This setting is selected by default. After your first delivery of records, you will receive new, updated, and delete records that reflect changes to titles and collection data.
- Include a complete set of records with every delivery
  - This setting is available for libraries that would like to receive both records with changes and records for titles that have not changed each time records are delivered. Note that records for titles/OCLC numbers that have previously been delivered will appear in an Update file rather than in a New file even if there were not changes. Please see the Criteria for new, update, and delete records for additional information.
Delivery File Output

You have the option to have records output in a separate file. By default, all records will be output in the same files (New, Updates, and Deletes files) along with records from other collections. Settings:

- Deliver records for this collection in the same file as other collections (default)
- Deliver records for this collection in a separate file

Have records delivered in a separate file

1. Navigate to the collection and expand the Holdings and MARC Records accordion.
2. In the Record Delivery tab, find the Delivery File Output settings and select Deliver records for this collection in a separate file.

3. Enter for the collection a file name of up to 25 alphanumeric characters.
4. Note that you have the option to group records from multiple collections for output in a separate file by entering the same file name in the collections.
5. By default, Isolate this file output from other collection activity is unselected. Leave the setting unselected unless one of the following statements is true for you. See the "Isolate file output from other collection activity" below for more information:
   - Your ILS requires that records for electronic resources contain a single URL even when a title is available in multiple collections
   - You are using query collections in Collection Manager to manage MARC records for a consortium

Collection Manager will output the records from the collection in a separate file and include the file name you entered between the time stamp and the file extension. Example where [XXX] represents your library symbol:

metacoll.[XXX].new.D20160214.T210512.[YourFileName].1.mrc

Group records from multiple collections

You have the option to group records from more than one collection in the same file by entering the same file name in each collection.

For example, if you have a DDA collection and a purchased collection, you could enter the file name "DDAandPurchased" within both collections and records from those two collections would be output together in the
same files.

<table>
<thead>
<tr>
<th>COLLECTIONS TO BE OUTPUT IN SEPARATE FILES</th>
<th>FILE NAME YOU ENTER WHEN YOU NAME THE SEPARATE FILE</th>
<th>SEPARATE FILES AND FILE NAMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collection 1</td>
<td>DDA collection</td>
<td>DDAandPurchased</td>
</tr>
<tr>
<td>Collection 2</td>
<td>Purchased collection</td>
<td>DDAandPurchased</td>
</tr>
<tr>
<td>Collection 3</td>
<td>Science e-collection</td>
<td>VendorCollections</td>
</tr>
<tr>
<td>Collection 4</td>
<td>Technology e-collection</td>
<td>VendorCollections</td>
</tr>
<tr>
<td>Collection 5</td>
<td>Engineering e-collection</td>
<td>VendorCollections</td>
</tr>
</tbody>
</table>

You will get a single file separate from files for your other collections. The file will contain records from both collections. Records/titles within the file will be distinguishable by collection name, collection ID, and collection notes or custom text (if you chose to map notes or custom text to your records).

Isolate file output from other collection activity

The setting to isolate file output from other collections is associated with how Collection Manager processes data for a record in relation to record data in items from other collections. The option is available in knowledge base collections in Collection Manager and in query collections with ongoing delivery in Collection Manager.

When to select the option in knowledge base collections

Select the isolate file option if your ILS requires a separate record with a single URL for every instance of an electronic title. In other words, select the option to isolate the collection if you want records to only contain the URL from their collection even though you might have the title in multiple knowledge base collections in Collection Manager.

By default (with this setting unselected), Collection Manager will deliver multiple URLs in a single record for a knowledge base title.

To find the setting to isolate the file output:

1. Navigate to the collection and to Holdings and MARC Records > Record Delivery > Delivery File Output.
2. Select the option to Deliver records for this collection in a separate file and enter a file name.

When to select the option in query collections

Select the isolate file option if you are using query collections in Collection Manager to output records for multiple libraries with unique WorldCat holding symbols. If you are from a consortia with multiple query collections set up to output records based on holdings for each institution, you can select the option to isolate your collections so that when a single library adds or deletes a holding in WorldCat, a New or Delete record will be delivered based on the
activity of a single collection.

By default (with this setting unselected), Collection Manager will deliver an Update record when a library deletes a holding if there are other collections for libraries have holdings set on the item. Collection Manager will deliver a Delete record only when a holding is removed from a library and no other libraries have holdings set on the item.

**To find the setting to isolate the file output:**

1. Navigate to the collection and to **MARC Records > Record Delivery > Delivery File Output**.
2. Select the option to Deliver records for this collection in a separate file and enter a file name.

You have the option to [Group records from multiple collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat) for output in a separate file by entering the same file name in the collections.

**WorldCat Holdings**

This setting acts as a filter to filter out from record delivery titles that you have set holdings on through some process outside of Collection Manager.

By default you will receive a **full set of records** for the titles in the collection. Your initial batch of records will have a record for every title. The default setting is:

- Include new records already held in WorldCat (default)

If you do **not** want records for items you already have holdings on in WorldCat, you can choose to have those titles withheld from record delivery. Change the setting to **Do not include records already held in WorldCat** and you will only receive records that do not already have your holding attached in WorldCat.

Note: If you choose not to have records output for titles you already hold in WorldCat, we recommend that you change this setting back to "Include new records already held in WorldCat" after you receive your first delivery.