Configure institution settings for cataloging partner collections

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

About institution settings

For help understanding how institution settings and collection-level options interact:

- See About cataloging partner collections in Collection Manager
- Review the Cataloging partner collection-level settings as you configure your institution record settings

Watch a video

Set up your profile (23:00)

This video shows how to set up your profile for your institution in WorldShare® Collection Manager for WorldCat® cataloging partner collections.

Configure 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. WorldCat Holdings

Enable WorldCat holdings maintenance across your collections

Collection Manager allows libraries with an OCLC Cataloging Subscription or CatExpress subscription to set holdings in WorldCat based on titles in their Collection Manager instance. Collection Manager will automatically maintain holdings in WorldCat as titles in dynamic collections are added, deleted, or updated.

By default, the WorldCat Holdings setting is disabled in institution settings. WorldCat Holdings settings are not applicable to query collections or to collection-level settings to create data sync collections in Collection Manager.

To enable holdings maintenance across all of your collections:

1. Navigate to Institution Settings > WorldCat Holdings.
2. Set Maintain holdings in WorldCat to Yes.
3. Now that you have enabled WorldCat Holdings in the institution settings, the setting activates default settings across your collections. Review the list of default collection-level settings:
   ◦ Enabled for all collections you have selected or will select from the global WorldCat knowledge base and enabled for knowledge base collections you have created
   ◦ Disabled for open-access knowledge base collections
   ◦ Enabled for cataloging partner collections you have created or will create. The settings will take effect when you activate your cataloging partner collections. You have the option to use the collection-level setting in cataloging partner collections to delay setting holdings in WorldCat by up to 180 days
4. Follow the instructions to change a collection-level WorldCat Holdings setting if needed.

To change a collection-level WorldCat Holdings setting:

1. Search for the collection. See Search for collections in Collection Manager.
2. Click on the name of the collection to open it and expand the collection-level Holdings accordion.
3. Adjust the setting within the collection. The options are:
   ◦ Use institution setting (Enabled)
   ◦ Disable for this collection

**WorldShare Interlibrary Loan and Tipasa libraries:** Make sure you have an appropriate deflection policy in place. See [How to deflect lending requests (knowledge base collections)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_interlibrary_loan_and_tipasa_libraries) or, if you have a subscription to License Manager, see [How to deflect lending requests (License Manager)](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_interlibrary_loan_and_tipasa_libraries). Most libraries experience an immediate increase in lending requests after setting holdings in WorldCat.

**Watch a video**

Maintain WorldCat holdings with WorldShare Collection Manager (4:16)

This video demonstrates how to enable the WorldCat Holdings feature in WorldShare Collection Manager. Enabling this feature allows Collection Manager to maintain your library’s holdings in WorldCat for titles that matches the titles in your library’s knowledge base and/or cataloging partner collections.

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Media, iframe, embed and object tags are not supported inside of a PDF.
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3. Reports

**Enable emailed 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](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_worldcat_interlibrary_loan_and_tipasa_libraries).

**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 (;).
6. Modify the **Report Format** and **Receive as** settings if needed.
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 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.

Data values

The following data values apply to cataloging partner collections. See the complete list of values and descriptions in Data values, Table 1.

- Cataloging Partner Data - If you select Cataloging Partner Data, you will see additional values. See Data values (for cataloging partner collections), Table 2.
- Collection Custom Text
- Copy Call Number
- Date Delivered
- Enter Free Form Text

Knowledge Base Collection 856 Field

Does not apply: Knowledge Base Collection 856 Field settings apply only to knowledge base 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 record.

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**

Does not apply: Local data settings do not apply to cataloging partner collections.

**WorldCat Updates**

Because cataloging partner collections are part of your holdings in WorldCat, you have the option to receive updated records based on changes to the WorldCat master record for your holdings in WorldCat. If you enable WorldCat updates, take care to **preserve your provider data** when you overlay updated records with those in your system. WorldCat update records will NOT have any of your mapped cataloging partner collection provider data.

Additionally, please note:

- Updated records reflect enhancements to the master record in WorldCat. Provider data is a result of the electronic order information that your provider sent on your behalf. Therefore, provider data you map to your records for titles in cataloging partner collections will be in the initial record output only
- Provider data will not be updated or output again unless you have the provider send your electronic order information again
- We recommend that you select to receive the record report for Updated Records (in Institution Settings > Reports). Information about updated records will not be included in cataloging partner reports
- Updated records are output on an on-going basis and will be output **daily** (unless you change the default setting in the Record Delivery tab). Your records for cataloging partner collections with mapped provider data will be output one time

The type of enhancement that triggers the output of an updated record depends on the update conditions and the including and excluding conditions that you define.

**(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](#).

### Update Option

<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>UPDATE CONDITIONS</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Receive updates for selected criteria <strong>(Recommended)</strong></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
- 7
- K
- 4
- 8

#### 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 computer (e.g., a CD-ROM player). Do not use code s 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 code s to either code o or q.</td>
</tr>
</tbody>
</table>

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](https://www.oclc.org). To edit your information in the WorldCat Registry:

1. Sign out of WorldShare Collection Manager.
2. Sign in to [OCLC Service Configuration](https://www.oclc.org/). 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 does not apply to cataloging partner collections. Records are delivered one time.

**File Output**

Does not apply: This setting does not apply to cataloging partner collections. It does apply to WorldCat updates for your WorldCat holdings and titles from cataloging partner collections might be included in 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 $0$s 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

(Optional) Change default Cataloging Partner Options settings

Cataloging Partner Options settings only apply to cataloging partner collections.

Do not deliver WorldCat records if WorldCat holdings are already set for these institutions

This setting is primarily used by consortia and libraries that have multiple OCLC symbols. If you do not want to receive records for titles on which holdings are already set:

1. Enter the OCLC symbol for each institution.
2. Use a space to separate multiple entries.

Deliver PDRs if no WorldCat record is delivered

Choose whether or not you would like a partnering data record (PDR) delivered:
- Yes
- No

If you select Yes, OCLC will deliver a record that includes your mapped provider data when:
- A full record is not available or is not found
- Your institution (or an institution in your group or consortia) has already received the record

Include OCLC number in PDR, if available

Choose whether or not you would like OCLC numbers to be included in your partnering data records (PDRs):
- Yes
- No

What is a partnering data record (PDR)? A partnering data record (PDR) is an optional record created by OCLC when no OCLC record is found or delivered. It contains title, ISBN and provider-provided data.