Configure institution settings for knowledge base collections

Use this article to configure the most used institution settings for knowledge base collections in Collection Manager.

Configure institution settings

Institution settings

Configure the following institution 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)** or, if you have a subscription to License Manager, see **How to deflect lending requests (License Manager)**. 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.
3. Proxy and Authentication

**Enter your proxy information so off-campus patrons are directed through a proxy server**

Collection Manager helps you manage patron access to materials by directing off-campus patrons through your proxy server. Collection Manager will prepend your proxy information to catalog links. Both on-campus and off-campus patrons will be given proxy links. Consult the documentation for your proxy server to determine how to configure your proxy settings to ignore on-campus patrons so they do not have to sign in.

You can override proxy information for a single collection within a collection's collection-level settings. See [Collection-level settings in knowledge base collections](#).

**Proxy Type**

1. Navigate to [Institution Settings > Proxy and authentication > Proxy](#).
2. Select Proxy:
   - None (default)
   - EZproxy
   - III WAM Proxy

**Base URL**

- EZproxy users:
  - Enter your [Base URL](#). Example of a EZproxy base URL: http://ezproxy.oclc.org/login?url=
- III WAM Proxy users:
  - Enter the [Hostname](#). Example of a III WAM Proxy hostname: sys.lib.proxy.edu

Caution: Do not include a space after the Base URL.

**Username and Password**

(Optional) Enter your [Username](#) and [Password](#). Providing username and password information is used by OCLC for de-bugging purposes only.

4. Provider Settings

**If your provider is listed, enter your provider-specific identifier needed for your links to resolve**

**About linking IDs**

Collections from certain providers require identifiers specific to the provider in order for links to resolve to full-text. The ID is often included in the URL you use to access the provider's platform. For example, if you have an ID "XXX" from a provider:

- You might access the provider's platform with the URL: http://XXX.provider.com
- In Collection Manager, "XXX" would be the ID needed for Provider ID / Customer ID settings and once entered, the ID would be:
Configure provider settings

1. First, see the table below to see if you have a collection from a provider that requires a linking ID. If your provider is listed, continue with the steps below. If you do not know your ID, contact your provider before you proceed:

2. Navigate to **Institution Settings > Provider Settings**.
3. Select your provider from the drop-down list.
4. Enter the identifier from your provider.

Note: In special situations, you might need to override a linking ID for a particular collection. For help, see [Collection-level settings in knowledge base collections, Use Proxy](#).

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<th>SETTING IS ONLY REQUIRED WHEN CUSTOM LINKING HAS BEEN SET UP WITH THE PROVIDER</th>
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5. MARC Records

**Enable MARC records and customize your records**

If your library wants WorldCat MARC records for titles in knowledge base collections, we recommend that you finish configuring your institution settings and then follow the instructions to [Configure institution MARC Records settings for knowledge base collections](https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_wor...).
6. 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.

**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.

Your library might be interested in institution settings not listed above. For a complete list and details about institution settings, see **Collection Manager Institution settings**. See **Use collection data with other services** for workflows and settings associated with specific products and services.

Caution: If your library does not have an OCLC Cataloging Subscription, you will not be able to set holdings in WorldCat.