Fundamentals of WorldCat knowledge base collections
Class Handout

Recommended browsers

- Internet Explorer 11, or latest versions of Mozilla Firefox, Google Chrome or Apple Safari
- Browser compatibility chart: https://help.oclc.org/Librarian_Toolbox/Browser/Browser_compatibility_chart

Login to WorldShare Collection Manager

- Login to WorldShare interface with your library’s unique URL http://yourinstitution.share.worldcat.org/wms/

Add knowledge base collections

- Automatically add collections
- Select and modify collections
- Create new collections

More information:
- About knowledge base collections in Collection Manager
Other options to add knowledge base collections

- Add your U.S. government document collections
- Add open access collections
- Map a holdings file

More information:
- About knowledge base collections in Collection Manager

Automatically add collections

1. See if your provider is on the Provider and contacts list
2. Request OCLC and your provider work together
3. Verify your data has been loaded

More information:
- Automatic collection loading

Search in Collection Manager

Scope of
- Collection
- Title
  - Can search OCLC number, ISBN number of the title, or ISSN of the title
- Provider
- Data Sync Collection

Option to leave the search box empty and limit search by using “My Selected Collections”

Limit by “My Selected Collections”
- If selected, the search will return results with your library’s collections
- If not selected, the search will return results from the global WorldCat knowledge base and any collections your library has created.

More information:
- Search for collections

Select and modify knowledge base collections

- Select entire collections
  1. Login to the WorldShare interface
  2. Click Metadata
  3. Click Collection Manager
4. Search for collection
5. Review collection content
6. Click Select collection

More information:
• Select a knowledge base collection in full

Modify collections
1. Login to the WorldShare interface
2. Click Metadata
3. Click Collection Manager
4. Search for collection
5. Search for the title(s)
6. Review title information
7. Select title(s)

More information:
• Modify a collection to select your subset of titles

Add new knowledge base collections

Title-by-title
1. Login to the WorldShare interface
2. Click Metadata
3. Click Collection Manager
4. Click Create a Collection
5. Choose Standard Collection
6. Click Create
7. Add title(s)

More information:
• Create a new knowledge base collection
• Link scheme values and overrides

Next steps
• Identify your publishers/providers you plan to automatically add collections. Check whether these providers are part of the list providers working with OCLC.

• Explore all available collections
  Collections available in the WorldCat knowledge base

• Add information to sections in Institution Settings
  Configure institution settings for knowledge base collections
Support and Resources

Community

- Community Center
  http://www.oclc.org/community/home.en.html

Support & Training

- Documentation
  WorldShare Collection Manager

- Training (includes instructor-led sessions, recordings, tutorials, and learning paths)
  WorldShare Collection Manager

Office Hours

- Via WebEx (no registration required)
- Details for access code and call-in numbers: Office hours

Contact Customer Support

- United States: 1-800-848-5800 or support@oclc.org
- In your region: http://www.oclc.org/support/contact-support.en.html