

OCLC WorldShare Collection Manager quick start guide for JSTOR libraries

Note: The screenshots herein are given for illustration only. Screen displays may vary depending upon the current site design and the WorldShare services to which your library subscribes.

Initial sign-in / Change password

If you have not already been provisioned for Collection Manager, please complete the online form at <https://www.oclc.org/forms/col-man-marc.en.html>.

Please provide your OCLC symbol and/or Registry ID, if known; however, you may still submit the form without either of these.

After completing the online form to be provisioned, you will receive an email from OCLC Order Services giving you a library-specific URL for accessing WorldShare.

Once you receive that email, please follow the accompanying instructions for setting your username and/or password (the specific steps are dependent upon your OCLC cataloging subscription level).

Once your password has been set, log into WorldShare.

MARC Record Delivery

Now you'll need to enable MARC record delivery. In the left-hand navigation pane, expand the Collection Manager accordion. Click "Institution Settings" and then "MARC Records".

The screenshot displays the OCLC WorldShare Collection Manager interface. At the top, there are tabs for Metadata, Acquisitions, Licenses, Circulation, Analytics, and Admin. The left-hand navigation pane is expanded to show the Collection Manager section, which includes Record Manager, My Labels, and a Search section. The Search section has a dropdown for Scope (set to Collection), a Search Term(s) field, and a Limit by section with a checked box for My Selected Collections. Below the Search section are buttons for Activity History, Approve Changes to Global Collections, View Recent Collections, Create a Collection, and Institution Settings. The Institution Settings button is circled in red. The main content area shows the Institution Settings page, which has a Save button and a list of settings: OCLC Symbol, Knowledge Base Data, WorldCat Holdings, Proxy and Authentication, Provider Settings, Sharing, WorldCat Discovery, MARC Records (circled in red), Reports, and Display Options.

Click the radio button for “Yes” to “Enable MARC record delivery”

Institution Settings

Save

- ▶ OCLC Symbol
- ▶ Knowledge Base Data
- ▶ WorldCat Holdings
- ▶ Proxy and Authentication
- ▶ Provider Settings
- ▶ Sharing
- ▶ WorldCat Discovery
- ▼ MARC Records

Enable MARC Records Delivery Yes No Your symbol is [TS249](#).

Be sure to click the “Save” button in the upper-left corner *if* you have changed your MARC delivery setting.

Collection-specific preferences and enabling MARC delivery

To view the collections for which your library has signed up uncheck “my selected collections” under the Collection Manager accordion and search “Books at JSTOR” in the search box. Click the “Search” button.

Collection	Provider	Account Number	Created	In My Holdings
Books at JSTOR All Purchased Customizable	JSTOR		8/1/2013, 5:28:24 PM	✓ Held by my library (55,179 / 55,179) Titles Deselect Collection
Books at JSTOR Demand Driven Acquisitions Customizable : Demand Driven Acquisitions	JSTOR		1/27/2014, 11:02:19 AM	✓ Held by my library (55,179 / 55,179) Titles Deselect Collection
Books at JSTOR Evidence Based Acquisitions Customizable	JSTOR		10/11/2016, 11:42:23 AM	✓ Held by my library (21,430 / 21,430) Titles Deselect Collection
Books at JSTOR Open Access Customizable	JSTOR		10/11/2016, 11:46:25 AM	✓ Held by my library (79 / 79) Titles Deselect Collection

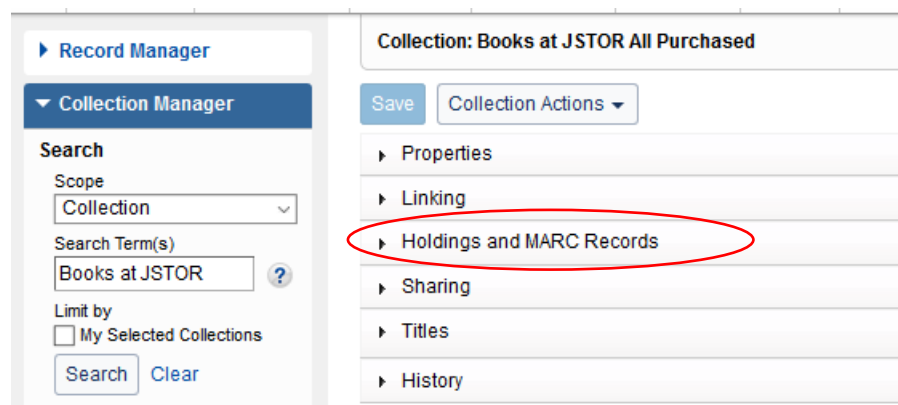
The collections to which your library subscribes will appear in the right pane.

Depending upon your library’s acquisitions model with JSTOR, “Books at JSTOR Open Access”, “Books at JSTOR All Purchased”, “Books at JSTOR Demand Driven Acquisitions”, and/or “Books at JSTOR Evidence Based Acquisitions” will appear in the results as selected, or “held”, collections. (If none of the Books at JSTOR collections in the search results are selected, then OCLC hasn’t finished loading your holdings feed from JSTOR. Please check daily until the expected collections display as selected in the search

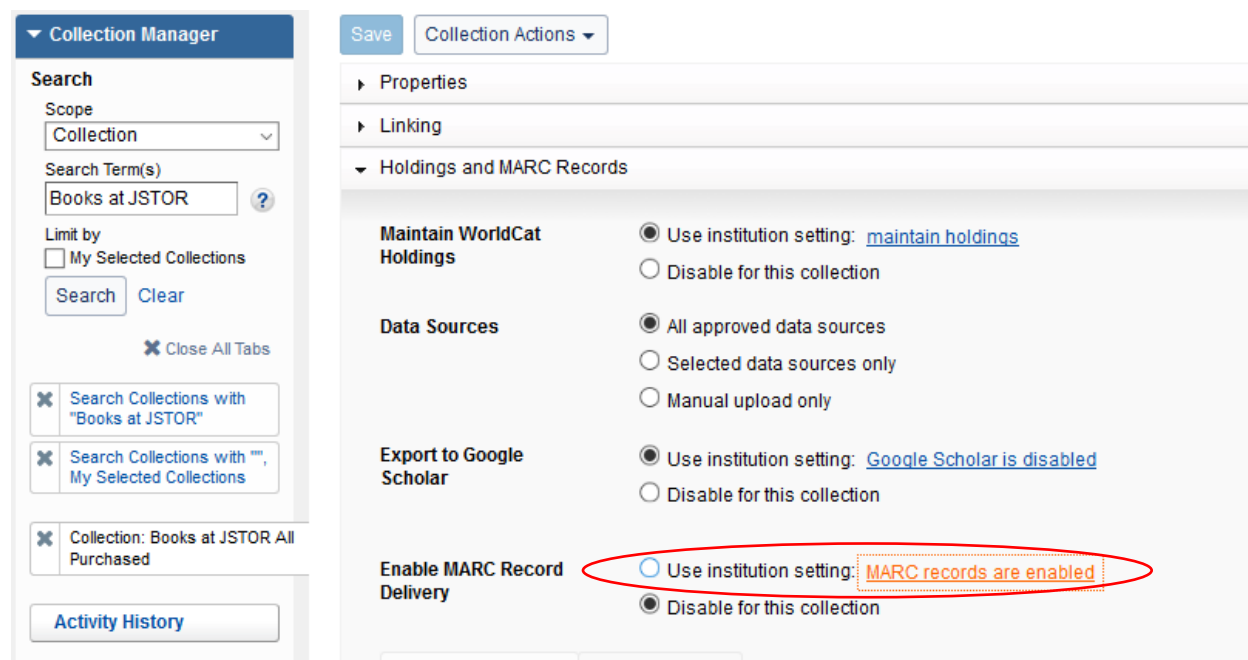
results. Remember: If a Books at JSTOR collection appears in the search results but indicates that it is not selected, or “held”, by your library, then **do not manually select it unless explicitly directed to do so by JSTOR.**)

Click on the name of the collection that has been automatically selected and whose setting you wish to modify.

Click “Holdings and MARC records”, which now appears among the options in the right pane.

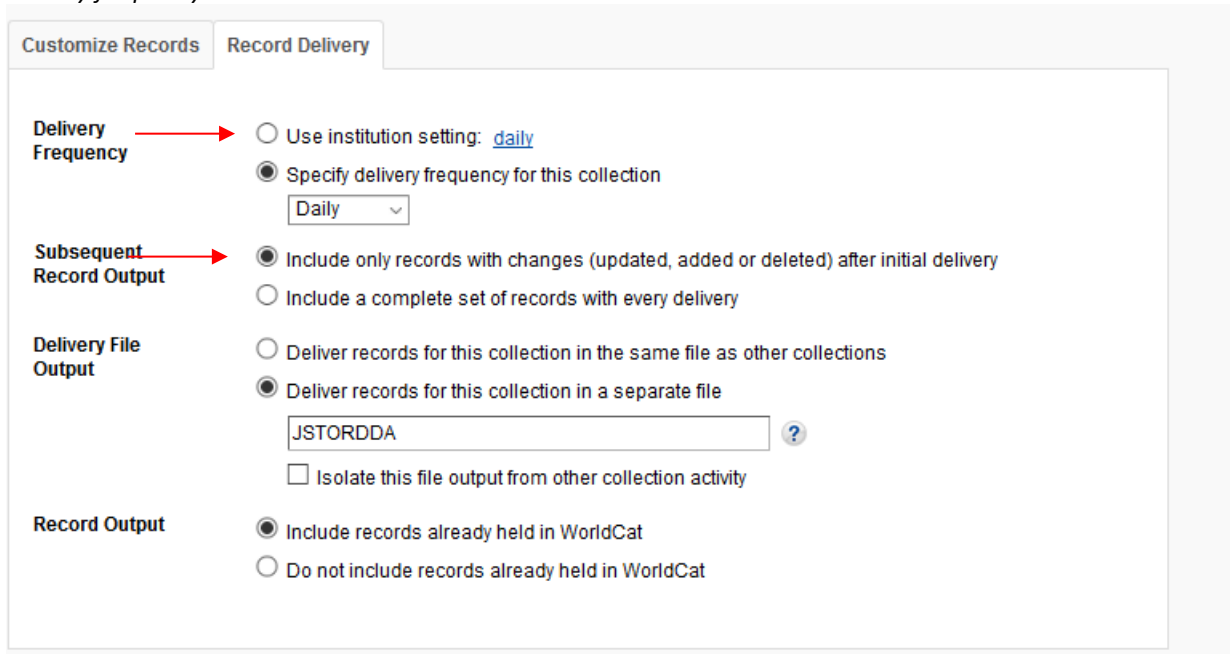


Options will then expand.



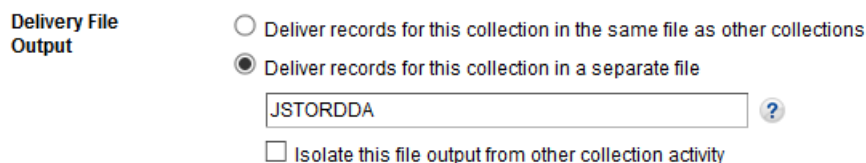
Next to “Enable MARC Record Delivery”, click the radio button for “Use institution setting”. The “Use institution setting” hyperlink indicates what your global settings for Collection Manager are currently set to. If MARC records are not enabled at the institution level, click the hyperlink to change your setting to enable MARC records.

Click the “record delivery” tab below “enable MARC Record Delivery”. You can opt to accept the institution setting displayed, or you may change the delivery frequency at the collection-level to Daily, Weekly or Monthly using the drop-down box. **JSTOR suggests users select Weekly as the desired delivery frequency.*



Options above were expanded further to illustrate how record delivery frequency and file naming can be customized for each collection.

Note: You may wish to have your records delivered in separate files according to collection(s). You can do this by defining a filename segment that clearly identifies to you the specific collection such as:

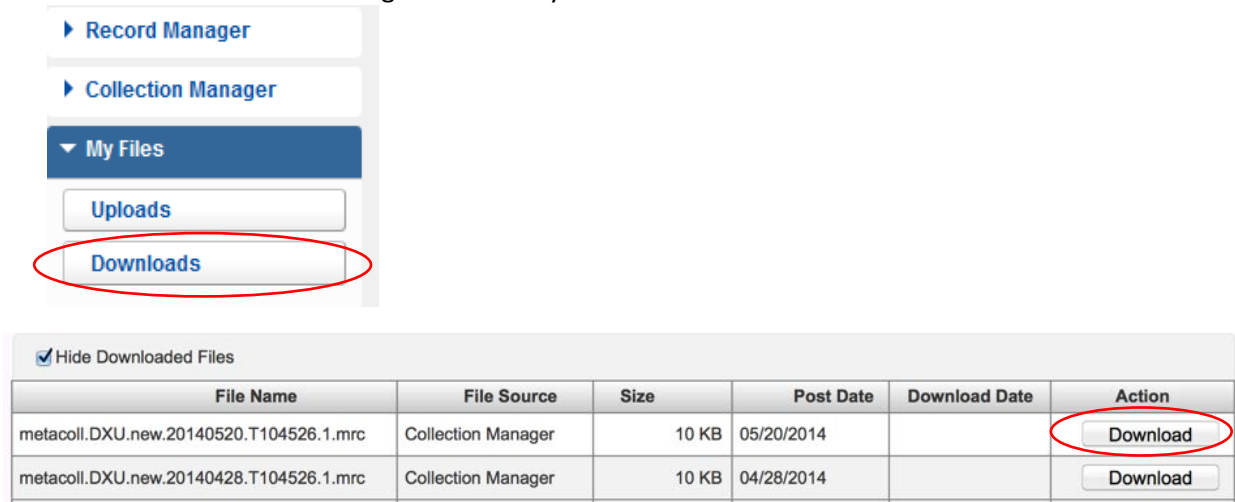


The text that you specify in this field will be inserted into the delivery file name so that you can easily identify it as a file containing records for that collection. You may specify file name segments for each of the Books at JSTOR collections in which you participate by accessing each of the relevant collections and specifying the desired file name segment for that collection.

Be sure to click the “Save” button in the upper-left corner when you have finished defining your customizations per collection.

Downloading MARC files

You can download your records from the WorldShare interface. You do not need additional credentials. Expand the “My Files” accordion to the left of the screen and click “Downloads”. Click the “Download” button to the right of the file you wish to download.



The screenshot shows the WorldShare interface. On the left, there is a navigation menu with three sections: 'Record Manager', 'Collection Manager', and 'My Files'. The 'My Files' section is expanded, showing two buttons: 'Uploads' and 'Downloads'. The 'Downloads' button is circled in red. Below the menu is a table with a checkbox labeled 'Hide Downloaded Files' which is checked. The table has six columns: 'File Name', 'File Source', 'Size', 'Post Date', 'Download Date', and 'Action'. There are two rows of data. The first row has a file name 'metacoll.DXU.new.20140520.T104526.1.mrc', source 'Collection Manager', size '10 KB', post date '05/20/2014', and a 'Download' button circled in red. The second row has a file name 'metacoll.DXU.new.20140428.T104526.1.mrc', source 'Collection Manager', size '10 KB', post date '04/28/2014', and a 'Download' button.

File Name	File Source	Size	Post Date	Download Date	Action
metacoll.DXU.new.20140520.T104526.1.mrc	Collection Manager	10 KB	05/20/2014		Download
metacoll.DXU.new.20140428.T104526.1.mrc	Collection Manager	10 KB	04/28/2014		Download

You will see files currently available for your library to download. Files are retained on the server for 90 days.

Though OCLC and its partners work closely together to ensure a record for every e-resource title, there may be variances in the number of records received. Also, records may be in OCLC's cataloging queue depending upon JSTOR's metadata feed.

Additional details concerning file delivery timing and file name syntax may be found at: <http://www.oclc.org/support/services/collection-manager/documentation/service-specific-settings/MARC-settings/record-retrieval-ftp.en.html>).

Still have questions?

Please refer to the support documentation below--or contact JSTOR support support@jstor.org or OCLC Support for your region <https://www.oclc.org/support/contact-support.en.html>

Virtual office hours:

Bring your questions about using the Collection Manager application or working with WorldCat knowledge collections. No prior registration or password is required. Call anytime within the hour. *Office hour dates may be found at:*

<http://www.oclc.org/support/services/collection-manager.en.html#officehours>

When reviewing these links please note that the Collection Manager options available to you may vary depending upon whether your library has an OCLC cataloging subscription.