

This document explains how to find, select and modify collections in the WorldCat knowledge base.

“Manage Collections” under the Metadata (or Licenses) tab in your WorldShare interface contains the WorldCat knowledge base functionality which allows you to manage electronic holdings at both the title and collection level and integrate your holdings with various end-user and staff interfaces, including WorldCat Local and WorldCat Resource Sharing/ILLiad.

After finding a collection in the global WorldCat knowledge base, you can:

1. Add the entire collection to your institution’s knowledge base
2. Modify the collection to mirror your subscription by:
 - Downloading the data for the entire collection to a spreadsheet, modifying the data, and uploading the modified data
 - Modifying data on a title-by-title basis within your WorldShare interface

Searching for a Collection



The screenshot shows the 'Manage Collections' menu with options: Settings, Library Holdings, Create Standard Collection, Create WorldCat Query Collection, and Activity History. Below the menu is a search section with a checked 'My Library Holdings Only' checkbox, a 'Collection' dropdown menu, a search input field, and a 'Search' button. A red circle highlights the 'Manage Collections' menu item, and a red box highlights the 'My Library Holdings Only' checkbox with an arrow pointing to it.

1. Log in to your WorldShare interface.
2. Click **Metadata (or Licenses)** from the top of the screen, and then click **Manage Collections**.
3. You will see a search box. You can search by Collection, Title or Provider by using the dropdown menu.

Uncheck “My Library Holdings Only” to search the global WorldCat knowledge base.

- To search by OCLC number, ISBN, or ISSN, choose “Title” from the dropdown menu, enter the number in the search box and hit “Search.”
- Leave the search box blank to find all collections, providers, or titles available in the global WorldCat knowledge base.
- Use “*” as a truncation operator. For example, nature* returns all items starting with “nature”
- If searching by Collection does not return the collection you expected, try searching by Provider. The collection you are searching for might be available, but named differently in the knowledge base.

Understanding your Search Results: Non-Customizable and Customizable Collections

After searching for a collection, you will see a list of results that include the collection name, the provider, the number of titles in the collection and button to select the entire collection.

Each collection will be marked “Customizable” or “Non-Customizable”:

 Academic Abstracts FullTEXT Ultra Provider: EBSCOhost Customizable	←	Customizable collection (you can modify the titles, coverage dates, and so forth, to match your library’s specific holdings)
 Academic ASAP Provider: Gale Group Non-Customizable	←	Non-Customizable collection (the collection is only available as it is represented, i.e., you cannot modify the collection title-by-title or via file download)
 Academic Complete Provider: ebrary Customizable		

Click the name of the collection to view a list of titles in the collection. If the collection is Non-Customizable, you **cannot** edit the title details. You can only select the collection as it is represented.

Selecting an Entire Collection

To select an entire collection as it is represented in the global WorldCat knowledge base, simply click the “Select Collection” button. This selects the entire collection.

	Not Held by my library (0 / 760) Titles Select Collection
	Not Held by my library (0 / 1267) Titles Select Collection
	Held by my library (4 / 72091) Titles Deselect Collection

After clicking “Select Collection,” the message “Locked for Indexing” will appear while the titles are added to your knowledge base.

	Held by my library (760 / 760) Titles Locked for Indexing Refresh
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Modifying a Collection via File Download

If you have a large collection to modify, find the collection in the Manage Collections section of the Metadata (or Licenses) module and download the data for the entire collection. Use a spreadsheet to modify the data to match your library's holdings. If you have a small collection to revise, it might be easier to modify the data for those titles on a title-by-title basis (See Page 8).

Section 1: Selecting and downloading a file

- Log in to your WorldShare interface.
- Click **Metadata (or Licenses)** from the top of the screen, and then click **Manage Collections**.
- Search for your collection (Uncheck/check "My Library Holdings Only" as appropriate for your search). Click on the name of the collection.
- Using the drop-down menu that reads "More Actions," select "Download Available." This will download all available titles so that you can modify the details in a spreadsheet to match your subscription.



Select the following options:

- Download type: **KBART**
 - File encoding: **UTF-8**
- Click "**Download**"

A screenshot of a dialog box titled "Download Collection File". It contains the following fields:

- Collection Name: American Association for the Advancement of Science
- Scope: Titles in local holdings Available titles in collection
- Download type: KBART (dropdown menu)
- File encoding: UTF-8 (dropdown menu)

An orange arrow points from the instructions box to the "Download type" dropdown.

If your collection data includes Non-Latin/Non-Roman characters, use "UTF-16LE (Unicode Text/Excel)" as the File encoding to download the file. Save your file as Unicode Text .txt in MS Excel before uploading the file back to the WorldShare interface.

The file you download will be a .txt file. However, to work with the data, you will need to copy the data into a spreadsheet. Follow these instructions:

- Open your .txt file in Notepad.
- Go to **Edit - Select All** to copy the entire selection.
- Open Microsoft Excel. Click in the first cell of the spreadsheet, and then right click and paste.
- The content of the .txt file will populate the spreadsheet in KBART format.

If you have a spreadsheet or holdings information from your provider, you are ready to modify the file by deleting titles that are not part of your subscription, changing coverage information, etc. See the following sections for help.

Section 2: Deleting titles that are not part of your subscription

- Delete the rows containing the titles/data that are not part of your subscription. You'll need to compare the spreadsheet you've downloaded with a list of titles held from your provider.
- Use "select" as the value for all of the rows that remain in the ACTION column. (You will need to change the value from "raw".)
 - Using "select" ensures that OCLC will not change the number of titles in the collection, but will update URLs, coverage, etc., for your title list when that information is updated by the provider.
 - See Section 7, "ACTION Column Values" for additional information about the ACTION column.

VLOOKUP is a popular function in Excel that librarians can use to match data in columns in two different spreadsheets. This function, along with the Sort function in Excel, can save you time when modifying collection data downloaded from your WorldShare interface to match a spreadsheet of holdings from your provider.

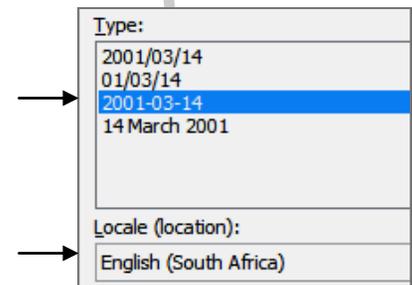
- Learn more about VLOOKUP at <http://office.microsoft.com> with a [VLOOKUP Tutorial](#) or refresh your memory with the [VLOOKUP Quick Reference Card](#).

Section 3: Modifying coverage information

- Modify the coverage data to reflect your subscription.
- Use only those fields that apply. If you have only year and month, use **yyyy-mm**; if you have only a year, use **yyyy**.
- Cells with coverage data with specific **days** must be formatted: **yyyy-mm-dd**. See below for how to set the date format in Excel. Find more formatting information at http://www.uksg.org/kbart/s5/guidelines/data_fields

Set the date format YYYY-MM-DD in Microsoft Excel:

1. Select the cells you want to format (**cells with years, months, AND days**)
2. Right click on the selected cells and select "Format Cells..."
 - In the Number tab under Category, select "Date"
 - Under Locale (Location), select "English (South Africa)" from the drop down menu
 - Under Type, select the format that matches "yyyy-mm-dd"



- Place the value "coverlay" in the rows in the ACTION column where you have made coverage changes.
- If there are rows where you did not make any changes, place "select" in those rows in the ACTION column. See Section 7, "ACTION Column Values" for additional information about the ACTION column.

See Page 7 for more information on ACTION column values....

Modifying coverage information, Continued...

If your coverage is to present, leave the following columns blank:

- date_last_issue_online (date of the last issue available online)
- num_last_vol_online (number of the last volume available online)
- num_last_issue_online (number of the last issue available online)

Multiple coverage ranges

To represent multiple coverage ranges for a title you must copy or create a new row for each coverage range you want to represent. All the KBART column values for those title rows should match except those representing the coverage dates. Also notice that each title has been assigned a unique oclc_entry_id – this must match for the coverage ranges to be combined.

	A	B	C	D	E	F
1	publication_title	print_identifier	online_identifier	date_first_issue_onli	num_first_vol_online	num_first_issue_online
2	Papers of the British School at Rome	0068-2462	2045-239X	2008/11/01	76	
3	Journal of Institutional Economics	1744-1374	1744-1382	2005/06/01	1	1
4	Primary Health Care Research and Development	1463-4236	1477-1128	2000/01/01	1	1
5	Studies in American Political Development	0898-588X	1469-8692	1998/04/01	12	1
6	Studies in American Political Development	0898-588X	1469-8692	2003/06/01	34	1
7						
8						
9						

Notice all KBART column values are matched for "Studies in American Political Development" except those related to the title's coverage range.

Represent embargoes/coverage with a moving wall in a column with the label: embargo_info

- Examples of the format are as follows: P1Y, R180D, P6M and R10Y;P30D
- Find more information at http://www.uksg.org/kbart/s5/guidelines/data_fields#embargo

Section 4: Modifying other information (other than titles or coverage)

If you modify data (other than by deleting titles or changing coverage) and do not want OCLC to overwrite that information as we receive updated information from the data provider, use the value "overlay" in the ACTION column for those rows.

If there are rows where you do not make any changes, use "select" for those rows in the ACTION column. See Section 7, "ACTION Column Values" for additional information about the ACTION column.

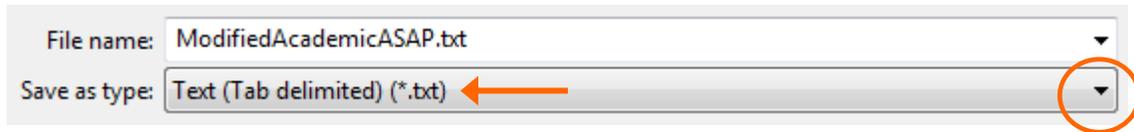
DO NOT change information in these columns:

- oclc_collection_name
- oclc_collection_id
- oclc_entry_id

Section 5: Saving your file

Excel files (.xls) or (.xlsx) will NOT upload correctly. When you have finished modifying your data, save your spreadsheet as a tab delimited text file (.txt). In Excel:

- Go to File, “Save As...”
- Choose **Text (Tab Delimited) .txt** from the dropdown menu.



Remember what you named the file and where you saved it.

Section 6: Uploading your file to your knowledge base

1. Log in to your WorldShare interface.
2. Click **Metadata (or Licenses)** from the top of the screen, and then click **Manage Collections**.
3. Search for the collection and open it.
4. Using the drop-down menu that reads "More Actions," select "Upload file."



Collection Name	American Association for the Advancement of Science
Type of Upload	<input checked="" type="radio"/> Update changes only <input type="radio"/> Replace holdings in collection
File encoding	UTF-8
Filename	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="Upload"/> <input type="button" value="Close"/>	

Set “Type of Upload” to **Update changes only** or **Replace holdings in collection**. If you are attempting to delete titles from the collection you must use the replace function. Leave the “File encoding” set at **UTF-8**.

Browse for your **.txt** file and click **upload**.

If your collection data includes Non-Latin/Non-Roman characters, save your file as Unicode Text .txt in MS Excel and use "UTF-16LE (Unicode Text/Excel)" when you upload the .txt file in the OCLC interface.

Click **Activity History** under **Manage Collections** to check on the status of your file upload.

Section 7: ACTION Column Values

Each row of your collection data spreadsheet must have a value in the ACTION column. The value you choose serves as instructions for OCLC on how to handle your data, i.e., what information OCLC will or will not update in the future when we get new information from a provider.

When you download a collection, the ACTION column may have the value “raw.” You will need to change the value for each of the rows in your spreadsheet. Change the value to “select” in any rows where you have not made changes.

K	L	M
oclc_collection_id	oclc_entry_id	ACTION

Action Column Values

The value you supply in the ACTION column has an impact on how a record will be treated as OCLC updates your knowledge base in the future.

Select - Use for rows of titles/title data where you did not make changes. Likewise, use when you deleted some rows of titles/title data for a collection but did not make changes to the data for the titles that remain. OCLC will preserve your subset of titles and will update URLs, coverage data and other information for your titles when we receive changes from the provider.

Covoverlay - Use when you have modified coverage information. OCLC will preserve your specific coverage information and will update information other than coverage if we receive updated information from the database provider.

Overlay - Use when modifying information other than coverage. None of your data will be changed when OCLC receives updated information from the database provider. Using Overlay in your ACTION column means that we will not change any of the data in that row.

R	S	T
oclc_collection_id	oclc_entry_id	ACTION
credo.ebooks13	6944996	select
credo.ebooks13	6944998	select
credo.ebooks13	6945002	covoverlay
credo.ebooks13	6945000	covoverlay
credo.ebooks13	6945005	select
credo.ebooks13	6945014	select
credo.ebooks13	6945019	select

Include a value for each row in the ACTION column. You may use different values in the same spreadsheet.

When reporting problems, email support@oclc.org. Include your Registry ID. If possible, include a proxy login that will allow us to access full text. To diagnose and resolve issues, our support team needs to be able to see the full text for articles and books.

Modifying a Collection on a Title-by-title Basis

1. Log in to your WorldShare interface.
2. Click **Metadata (or Licenses)** from the top of the screen, and then click **Manage Collections**.
3. Search for your collection. Click on the name of the **customizable** collection to see the list of titles in the collection.

Note: Only some of the collections in the global knowledge base are customizable. Some collections are only available from a provider as complete collections and cannot be modified.

4. Select individual titles by checking the box in the “In My Holdings” column.
5. **After** you select an individual title, the title will become hyperlinked. Click on the title to edit the title details. Titles that can be modified show a pencil icon.

Title	Content Availability	Identifiers	In My Holdings	Action
 American Journal of Police	fulltext@1995~1996 abstracts@1995 fulltext@volume:14;issue:2~volume:15;issue:4 abstracts	OCN: 45158348 ISSN: 0735-8547 Website	<input checked="" type="checkbox"/> In My Holdings	Add To Order

6. Modify data such as the start and end dates of coverage. You have options for moving-wall coverage and an embargo on new issues. You can also modify the range of volumes/issues to reflect the ones your library owns.

Note: If you selected the entire collection as a whole, the individual titles will NOT be hyperlinked and you will NOT be able to edit title details. In order to edit a title, the collection must be deselected and then each title must be selected individually, on a title-by-title basis.

If you have questions, contact support@oclc.org