

WILEY



MARC Records Guide

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Introduction

Wiley has partnered with OCLC for the creation, delivery and support of Wiley Online Book and eReference work MARC records. Libraries are required to use OCLC's WorldShare Collection Manager platform to receive MARC records for Wiley titles. The use of this platform is free for all Wiley customers; however, the path to access will vary depending on whether the library holds a cataloging subscription. This document is intended to serve as an informational resource for those unfamiliar with WorldShare Collection Manager.

OCLC does have its own suite of resources available for libraries; please feel free to view the [WorldShare Collection Manager Overview page \(link\)](#) for more details. Please use this suite of tools as a guide and to augment your understanding of the process.

When using the Collection Manager platform, OCLC has recommended using the Google Chrome browser. If you do not have the Chrome browser installed, you may [download it for free here \(link\)](#).

As a trusted partner, OCLC is prepared to assist all customers getting acclimated with their product and information on their regional support can be found here. There is also a helpful online form you can use to submit a request from the OCLC Support team. The [OCLC Support form can be accessed here \(link\)](#).

Copyright

OCLC is Wiley's trusted partner in the creation, delivery, and support of its MARC records. Though ownership of this document belongs to Wiley, it is important to note that they collaborated heavily with OCLC for the creation of this document and other resources. Content from existing OCLC documentation has been imported and modified for the purposes of Wiley customers. OCLC was consulted for the review of this document, confirmed its accuracy, and agreed to its dissemination.



Process Requirements

Before being able to receive MARC records through Collection Manager, customers will need to:

1. **Access to WorldShare Collection Manager**
2. **Generate an automated holdings token in the Wiley Online Library Administrator Dashboard**
3. **Deliver holdings token to OCLC Support Team**
4. **Enable MARC record delivery within the Wiley Ebooks collection**
5. **Make additional configurations for MARC record customization**

1. Access to WorldShare Collection Manager

If your library has an OCLC cataloging subscription, you will more than likely have access to and have used WorldShare Collection Manager.

If you already have access to the platform by using your customized institutional URL, please skip to the next section, regarding your profile configuration.

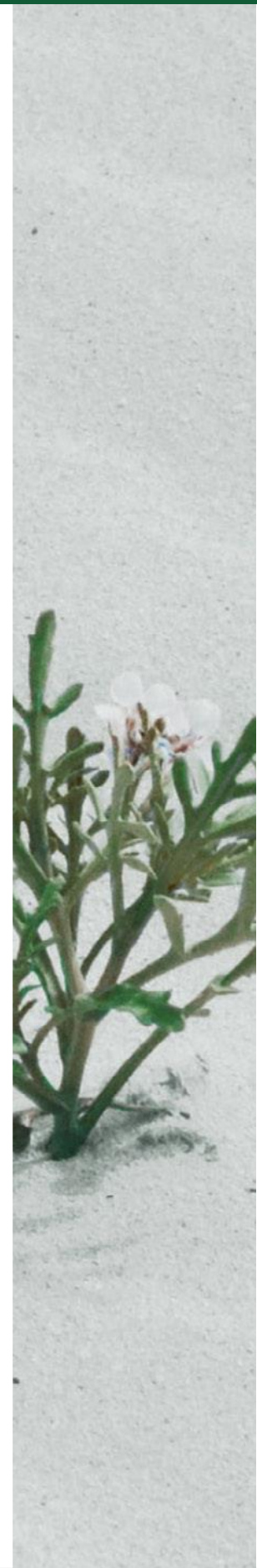
For libraries without an OCLC cataloging subscription, please take note as you will need to do the following:

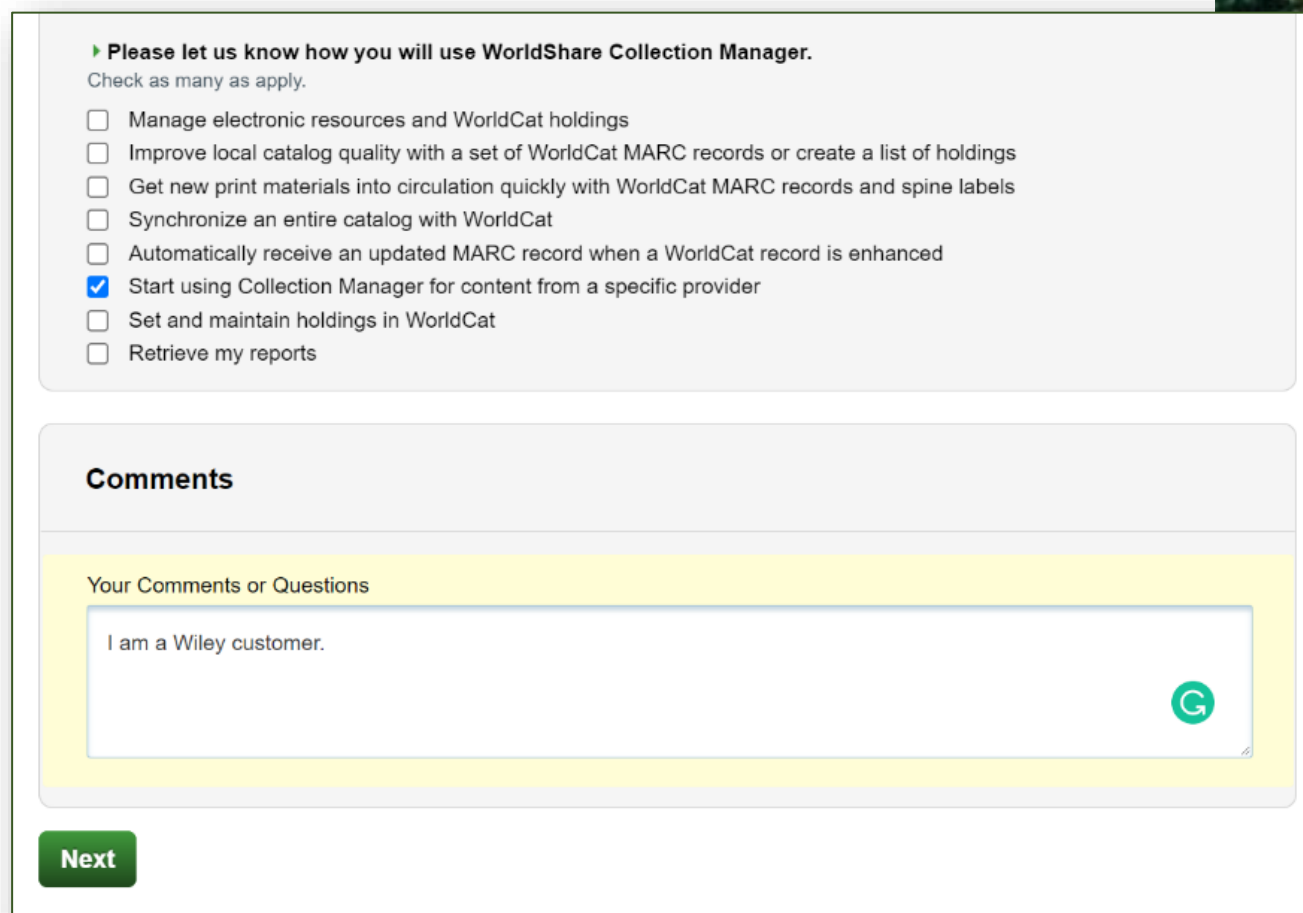
Please complete the [WorldShare Collection Manager Request form from OCLC](#) ([link](#)).

After entering your contact information, check the box that says, "Start using Collection Manager for content from a specific provider."

In the Comments section, type "I am a Wiley customer."

For an example of this form, please see below:



Collection Manager Request Form:A screenshot of a web form titled 'Collection Manager Request Form'. The form is divided into two main sections. The first section, titled 'Please let us know how you will use WorldShare Collection Manager.', includes a sub-instruction 'Check as many as apply.' and a list of nine checkboxes. The second section, titled 'Comments', contains a text area for 'Your Comments or Questions' and a green circular button with a white 'G' icon. A green 'Next' button is located at the bottom left of the form.

► Please let us know how you will use WorldShare Collection Manager.
Check as many as apply.

- ☐ Manage electronic resources and WorldCat holdings
- ☐ Improve local catalog quality with a set of WorldCat MARC records or create a list of holdings
- ☐ Get new print materials into circulation quickly with WorldCat MARC records and spine labels
- ☐ Synchronize an entire catalog with WorldCat
- ☐ Automatically receive an updated MARC record when a WorldCat record is enhanced
- ☒ Start using Collection Manager for content from a specific provider
- ☐ Set and maintain holdings in WorldCat
- ☐ Retrieve my reports

Comments

Your Comments or Questions

I am a Wiley customer.

Next

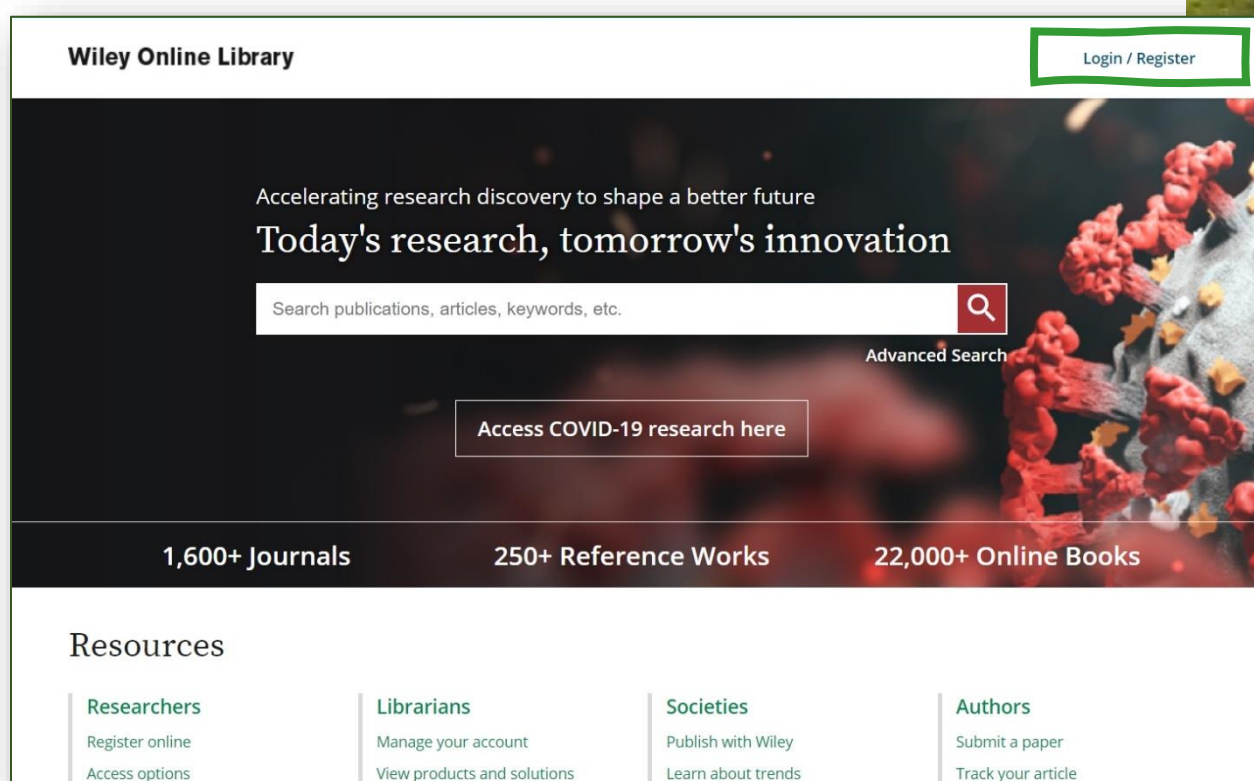
This will indicate to OCLC that your library shouldn't be charged for access. Access to Collection Manager is courtesy, free of charge, provided to all Wiley customers for the expressed purpose of MARC record delivery.

Once you have completed this form, you should receive a welcome letter from OCLC with your login information, instructions, and WorldShare Account credentials.

For an example of this welcome letter, please see [the Appendix](#). If your library does not receive a welcome letter, please send a follow up email to support@oclc.org

2. Generate an automated holdings token in the Wiley Online Library Administrator Dashboard

To retrieve an automated holdings token, you will need to login to your library's institutional administrator account on [Wiley Online Library \(link\)](#). Please use the Login/Register link, in the upper-right section of the page:

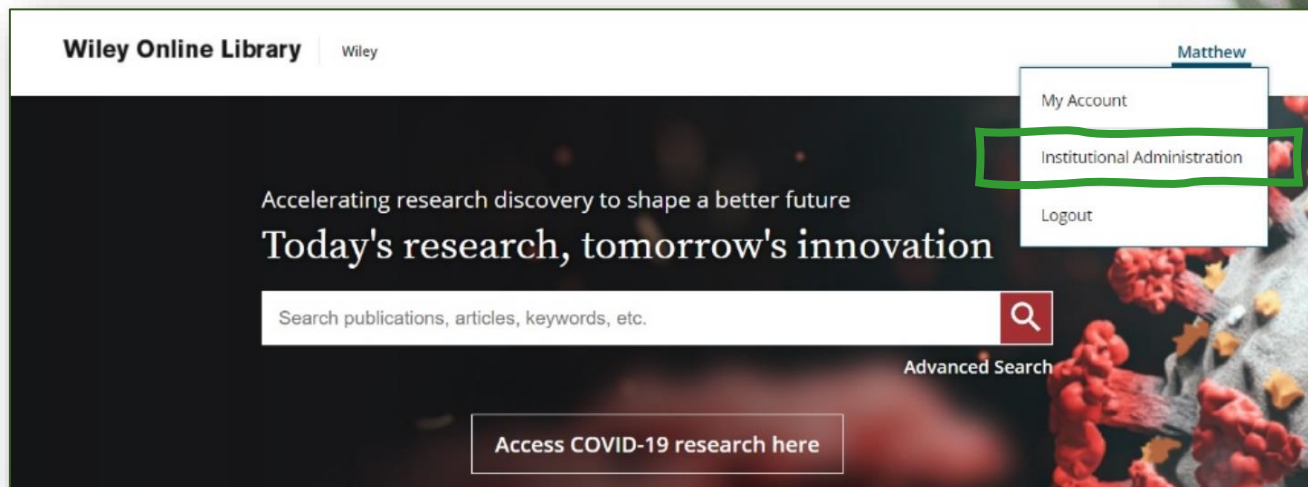


If you do not have an individual or institutional administrator Wiley Online Library account, please go through the steps listed on this [user guide \(link\)](#) or [overview video \(link\)](#) to create an account. In some cases, this login may be held by a colleague, so check in with them first, before creating an account on Wiley Online Library.

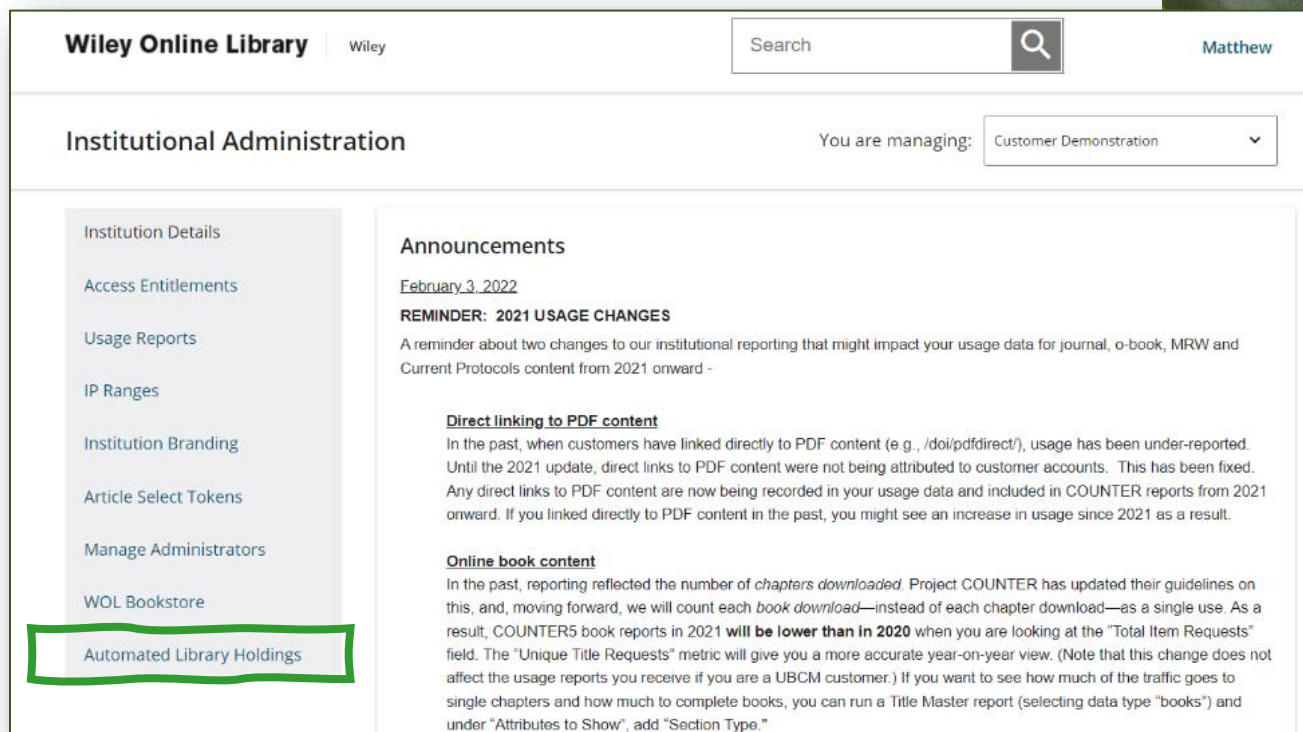
After creating an account, please contact [Wiley Support \(link\)](#), to have it added as an institutional administrator. Please be sure to

include the name of your institution and if possible, your Wiley customer ID or account number.

After successfully logging in, click the “Institutional Administrator” link drop down from your name. This will take you to the Administrator Dashboard:



From there, select the “**Automated Library Holdings**” tab from the sidebar menu:



Once in the Automated Library Holdings module, you can generate an access token. Select **“OCLC WorldCat”** from the Provider dropdown and click **“Generate token”** button.

The screenshot shows the 'Automated Library Holdings' page. On the left is a sidebar with navigation links: Institution Details, Access Entitlements, Usage Reports, IP Ranges, Institution Branding, Article Select Tokens, Manage Administrators, WOL Bookstore, and Automated Library Holdings. The main content area has a title 'Automated Library Holdings' and a paragraph explaining that libraries using OCLC WorldShare Collection Manager, Ex Libris Alma, and/or Ex Libris SFX can configure data exchange tokens. A 'PLEASE NOTE' section states that the holdings feed runs over the weekend. Below this is a 'Create new token' section with a dropdown menu for 'Provider' showing 'Ex Libris Alma', 'Ex Libris Alma', and 'OCLC' (highlighted in blue). A green box highlights the 'Provider' dropdown and the 'Generate token' button. Below the dropdown is an 'Active tokens' table with two columns: 'Provider' and 'Token'. The table contains one row for 'Ex Libris SFX' with the token '3KRTYPZTSKYZ8UGRLDN7GL3BZUKBMH'. A green box highlights the 'Copy' button next to the token.

Provider:	Token
Ex Libris SFX	3KRTYPZTSKYZ8UGRLDN7GL3BZUKBMH

Once you have generated a token for OCLC, click the **“Copy”** button. This will add the token to your clipboard. From there, you can proceed to the next step of delivering the token to OCLC to deliver your institutional holdings information.

3. Deliver holdings token to OCLC Support Team

[Contact OCLC Support \(link\)](#) to share your token and request automated holdings for Wiley titles. Send this message, replacing **[abc]** with your copied token, and **[xyz]** with your OCLC symbol:

“Please load my Wiley holdings. The token for OCLC to access my holdings is [abc]. My OCLC symbol is [xyz].”

If you do not know your institution’s OCLC symbol, you may indicate your institution’s name instead.

Once you have completed this form, you will receive a confirmation message from OCLC, that your holdings feed has been setup.

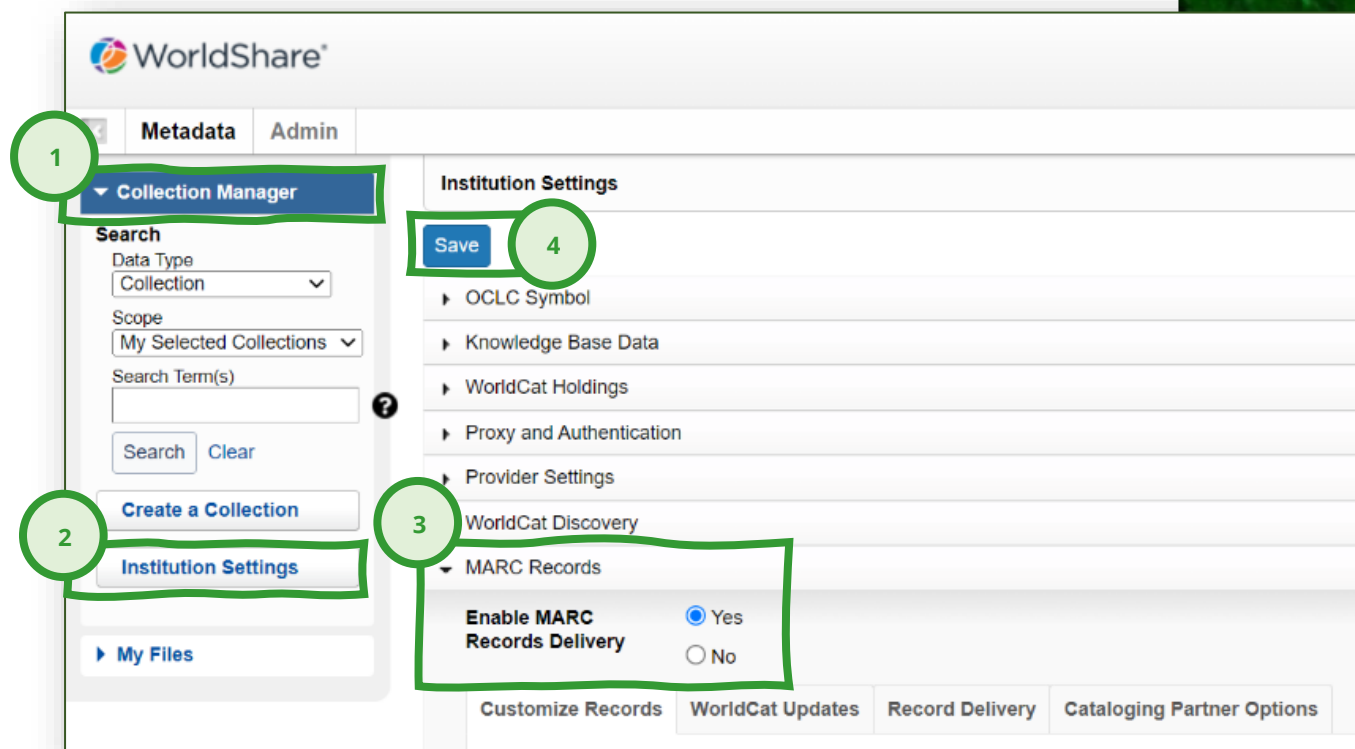
If your library does not receive a response within 1 week of delivering your token, please send a follow up email to support@oclc.org

4. Enable MARC record delivery in Collection Manager

Sign in to the WorldShare interface at your library's WorldShare URL (<https://yourlibrary.share.worldcat.org/wms> [Replace **yourlibrary** with your library's identifier]).

1. Navigate to **Collection Manager** > **Institution Settings** on the left.
2. Click the **MARC Records** dropdown in the middle of the screen.
3. Select "Yes" for **Enable MARC Record Delivery**
4. Click the blue "**Save**" button at the top of the page

Below is a screenshot of these steps:



Once you enable record delivery, tabs of settings will appear: Customize Records, WorldCat Updates, Record Delivery, Cataloging

Partner Options. You can leave the default settings or customize your records. If you do not wish to make any further record customizations, you may skip to the next session regarding instructions for record downloads.

Once MARC record delivery has been enabled at the institutional level, it also needs to be set within the collection. OCLC will have selected the Wiley knowledgebase collections for you institution.

You can do this by search for the “Wiley Online Library: Complete eBooks” collection by taking the following steps:

1. Navigate to **Collection Manager** on the left.
2. Select “**Collection**” in the “**Data Type**” dropdown.
3. Select “**My Selected Collections**” in the “**Scope**” dropdown.
4. Type “**Wiley**” in the search bar. This will limit to the specific Wiley collections relevant for your institution.
5. Click the collection “Wiley Online Library: Complete eBooks.”

Below is a screenshot of the search and collection:

The screenshot shows the WorldShare Collection Manager interface. On the left, the 'Collection Manager' tab is selected. The 'Search' section has the following settings: 'Data Type' set to 'Collection', 'Scope' set to 'My Selected Collections', and a search term 'Wiley' entered in the 'Search Term(s)' field. The search results table shows two collections:

Collection	Type / Attributes
Wiley Online Library: Complete Journals Collection ID: wiley.journals	Knowledge base collection • Google Scholar Enabled
Wiley Online Library: Complete eBooks Collection ID: wiley.ebooks	Knowledge base collection • Google Scholar Enabled • OCLC Cataloged

The 'Wiley Online Library: Complete eBooks' collection is highlighted with a green box and a green circle with the number 5, indicating the step to click on it.

Once the collection is selected, you can enable MARC record delivery at the collection level, by taking the following steps:

1. Select the **"Holdings and MARC Records"** accordion dropdown
2. Scroll down to the **Enable MARC Record Delivery** section and select **"Use institution setting"**
3. Click the blue **"Review Summary & Save"** button at the top.

Below is a screenshot of these steps:

The screenshot shows the Wiley Online Library Admin interface. The left sidebar contains a search bar, a collection list, and buttons for 'Create a Collection' and 'Institution Settings'. The main content area is titled 'Collection: Wiley Online Library: Complete eBooks'. It features a 'Holdings and MARC Records' accordion dropdown, which is highlighted with a green circle and the number 1. Below this, the 'Enable MARC Record Delivery' section is expanded, showing two radio buttons: 'Use institution setting: MARC records are enabled' (selected) and 'Disable for this collection'. This section is highlighted with a green box and the number 2. At the top of the main content area, the 'Review Summary & Save' button is highlighted with a green box and the number 3.

This is the last step required to enable MARC record delivery. Records usually arrive one week after this configuration is completed. However, some institutions may not see records for approximately two weeks. This is because Wiley sends a weekly update feed to OCLC, which then derives a record output based on this information.

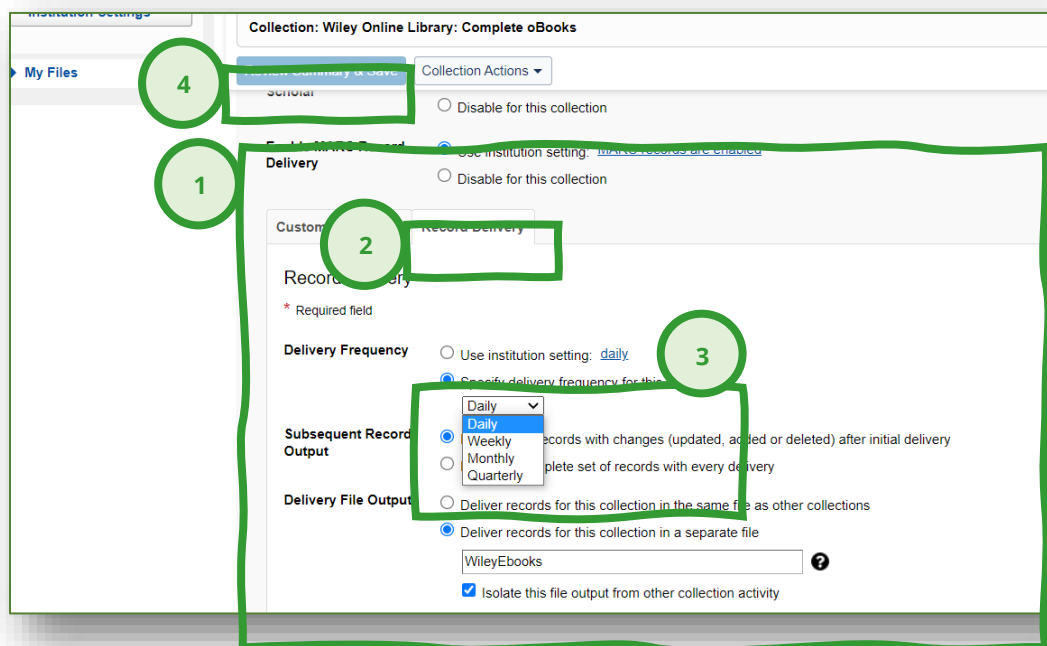
From here you have the option to customize record delivery, if you wish to use the daily record delivery settings, you may skip to the Record Downloads section (link) for further instructions.

5. Make additional configurations for MARC record customization

By default, records will be delivered in a batch file daily. Some institutions may prefer to reduce the number of deliveries they receive, ingesting them on a weekly, monthly, or quarterly basis instead. To change the frequency of record delivery, you can customize the record output within the collection. With “Wiley Online Library: Complete eBooks” collection selected (in the previous section), take the following steps:

1. After clicking the “Holdings and MARC Records” dropdown, scroll down to the **Enable MARC Record Delivery** section
2. Under that section, click the **Record Delivery** Tab
3. Change the **Delivery Frequency** setting to the desired timeframe from the dropdown.
4. Click the blue “**Review Summary & Save**” button at the top.

Below is a screenshot of these steps



5. Make additional configurations for MARC record customization

By default, records will be delivered in a general delivery file. You can customize the filename in the same section that you customized the frequency.

1. Change the **Delivery File Output** to "**Deliver records for this collection in a separate file**"
2. Fill in a filename like "**WileyEbooks**".
3. Click the blue "**Review Summary & Save**" button at the top.

More information on setting record customizations for specific fields can be found on the [OCLC product page here \(link\)](#).

Reporting

Setting Email Alerts for Records

Collection Manager offers the option to receive reports for MARC record deliveries. It is recommended that libraries sign up for these reports to see when new records are available. When files are available, libraries will receive a notification from UsageStatistics@oclc.org.

To sign up for reports, please take the following steps:

1. Navigate to **Collection Manager > Institution Settings** on the left.
2. Scroll down and click the **Reports** dropdown
3. Select "Yes" for **Receive Email Reports**
4. Enter your library 9 digit authorization code (if you don't know yours, you can request it by emailing OCLC orders@oclc.org)
5. Under report types, record reports select the desired report types (Deleted, New Monthly and/or Updated)
6. Enter the email address(es) for report recipients.
7. Select preferred report format and receipt option
8. Click the blue "**Save**" button at the top of the page



Below is a screenshot of these steps:

The screenshot displays the 'Institution Settings' page in the WorldShare interface. The page is divided into two main sections: 'Metadata' and 'Admin'. The 'Admin' section is active, showing the 'Institution Settings' form. The form includes a 'Save' button and a 'Sign up to receive reports for MARC record delivery and/or WorldCat holdings.' section. The form is annotated with numbered steps 1 through 8, indicating the sequence of actions to be taken.

1. Click on the 'Institution Settings' link in the left sidebar.
2. Click on the 'Reports' link in the left sidebar.
3. Click on the 'Receive Email Reports' radio button, selecting 'Yes'.
4. Enter the 'Authorization Code' (123456789) in the text field.
5. Click on the 'Report Types' dropdown menu, selecting 'Records reports'.
6. Enter the 'Email Address(es)' (address@oclc.org) in the text field.
7. Click on the 'Report Format' radio button, selecting 'Excel'.
8. Click on the 'Save' button.

Record downloads

The instructions below feature instructions on how to download directly from the WorldShare interface. You do not need additional credentials to download records from Collection Manager from the WorldShare interface - **Metadata > My Files** area.

To see the files currently available for your library to download:

1. Log into the WorldShare interface
(<https://yourlibraryprefix.share.worldcat.org/wms>)
2. Click on the **Metadata** tab
3. Expand **My Files**
4. Click **Download Files** to see a list of the files available for download. Wiley MARC will have your customized label, such as "WileyEbooks," in the filename.
5. Click the **Download button** in the **Action** Column

Below is a screenshot of these steps:

The screenshot shows the WorldShare interface. On the left, the 'Metadata' tab is selected, and 'My Files' is expanded. The 'Downloads' button is visible. On the right, the 'Downloads' section shows a table of files. The third row, representing a WileyEbooks file, is highlighted, and the 'Download' button in the 'Action' column is circled with a green line and the number 5.

File Name	File Type	Size	Post Date	Download Date	Action
metacoll.MYTAR.new.D20220109.T213020.ScienceDirectAllBooks.1.mrc.zip	Records - New	2 KB	01/10/2022		Download
metacoll.MYTAR.deletes.D20220110.T213023.ScienceDirectAllBooks.1.mrc.zip	Records - Deleted	2 KB	01/11/2022		Download
metacoll.MYTAR.new.D20220113.T213023.WileyEbooks.1.mrc.zip	Records - New	1,087 KB	01/14/2022		Download

In addition to downloading your records in the WorldShare interface, you have the option to access OCLC's server directly. You do not need additional credentials to download records via the WorldShare interface; however, if you would like to FTP to the OCLC Data Exchange Server for your records from Collection Manager, you will need a FTP username and password.

Please contact your [regional OCLC Support office \(link\)](#) for your institution's FTP credentials. Detailed instructions for both methods may be accessed here on this OCLC webpage.

Additional Support Resources

As a trusted partner, OCLC is prepared to assist all customers getting acclimated with their product and can be reached at support@oclc.org. There is also an online form you can use to submit requests to a regional OCLC Support team. The Support form can be [accessed here \(link\)](#). Additional reading on Collection Manager, may be accessed on OCLC's [product pages \(link\)](#).

Appendix

Below is a screenshot of the OCLC welcome letter

