

WorldShare Record Manager: Simplified cataloging

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OCLC



Learning objectives

- Find WorldCat records that match your items
- Optionally, add local data to records before exporting
- Set holdings
- Export records
- Download records from an export list
- Delete holdings

Compare full cataloging to simplified

Full
cataloging

Record Manager

Search

Data Type
Bibliographic Records

Scope
All WorldCat

Index
Keyword

Term(s) ?

Search Clear

[Advanced Search](#)

Create Record

Record Work Lists

Export Lists

Toolbox

User Preferences

Institution Settings

My Labels

Collection Manager

My Files

Record Manager

Edit 1263340103

Print Edit Record Advanced Action Save


Search

Data Type
Bibliographic Records

Scope
All WorldCat


Index
OCLC Number

Term(s) ?

 OCLC Number: 1263340103

Print book

WorldCat Holdings

My Library:  Not Held

[Other Libraries: 881](#)

Compare full cataloging to simplified

Simplified cataloging

Record Manager

Search

Scope

All WorldCat

Index

Keyword

Term(s) ?

Search Clear

[Advanced Search](#)

Export Lists


User Preferences

My Labels

My Files

View 1263340103

Print MARC View WorldCat Holding Send to Set Holding and Export Add Local Data

 OCLC Number: 1263340103 **WorldCat Holdings**

Print book My Library: Not Held [Other Libraries: 881](#)

Compare full cataloging to basic

Basic
cataloging

▼ Record Manager

Search

Scope

All WorldCat ▼

Index

Keyword ▼

Term(s) ?

Search Clear


[Advanced Search](#)



[User Preferences](#)

▶ My Files

View 1263340103

Print MARC View Set Holding and Export

 OCLC Number: 1263340103 **WorldCat Holdings**

 Print book Holding Audience Level:  Not Held

[Other Libraries: 937](#)

Roles

If your library has a full cataloging subscription:

To access simplified cataloging menus and options, user name must have “Cataloging Simplified”

or “Cataloging Basic” role and no other Cataloging roles

- Cataloging Admin ⓘ
- Cataloging Agent ⓘ
- Cataloging Basic ⓘ
- Cataloging Bulk Edit ⓘ
- Cataloging Evaluation ⓘ
- Cataloging Export ⓘ
- Cataloging Full ⓘ
- Cataloging Limited ⓘ
- Cataloging Reports Viewer ⓘ
- ✓ Cataloging Simplified ⓘ
- LHR History Viewer ⓘ

OR

- Cataloging Admin ⓘ
- Cataloging Agent ⓘ
- ✓ Cataloging Basic ⓘ
- Cataloging Bulk Edit ⓘ
- Cataloging Evaluation ⓘ
- Cataloging Export ⓘ
- Cataloging Full ⓘ
- Cataloging Limited ⓘ
- Cataloging Reports Viewer ⓘ
- Cataloging Simplified ⓘ
- LHR History Viewer ⓘ

Roles

If your library has a CatExpress subscription:
User name must have “CatExpress Simplified” or
“CatExpress Basic” role

- CatExpress Admin ⓘ
- CatExpress Basic ⓘ
- CatExpress Reports Viewer ⓘ
- ✓ CatExpress Simplified ⓘ

Roles

If your library has a Fundamentals subscription:

User name must have “Fundamentals Record Manager Simplified” or “Fundamentals Record Manager Basic” role
and no other Fundamentals Record Manager roles

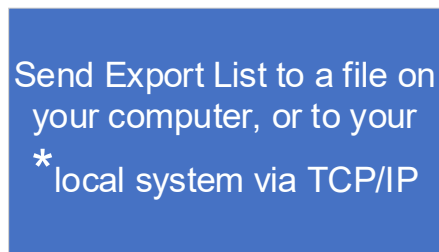
- Fundamentals Admin ⓘ
- Fundamentals Collection Manager Staff ⓘ
- Fundamentals Collection Manager Supervisor ⓘ
- Fundamentals Record Manager Basic ⓘ
- ✓ Fundamentals Record Manager Simplified ⓘ
- Fundamentals Record Manager Supervisor ⓘ
- Fundamentals Reports Viewer ⓘ

Copy cataloging workflow



Repeat for each title, then

* Simplified role only



Match records to items: focus on these fields

- Title (245)
- Edition (250)
- Publisher (264 or 260)
- Physical description (300)
- Language of cataloging (040 \$b)
- If these fields match, usually prefer a record with:
 - Encoding Level **Full**
 - A national library symbol in Cataloging Source OR an Authentication Code such as **pcc**

National libraries and authentication codes

Symbol	Library
DLC	Library of Congress
PCC	Program for Cooperative Cataloging
GPO	Government Printing Office
NLM	National Library of Medicine
NAL	National Agricultural Library
NLC	Library & Archives Canada
UKM	British Library

Matching example

COLIN WOODARD



AMERICAN NATIONS



A History of the
Eleven Rival Regional Cultures
of North America

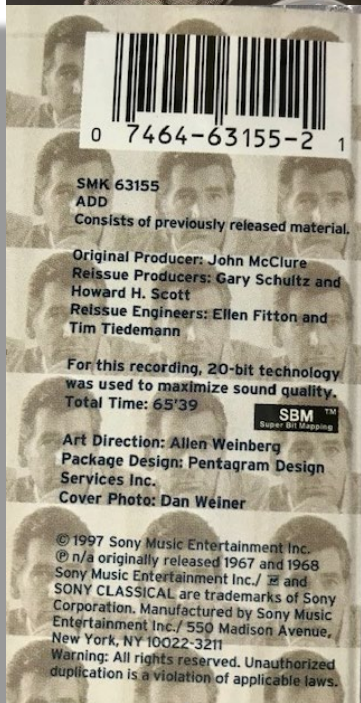
VIKING

Published 2011
viii, 371 p. ; 24 cm.

ISBN 9780670022960
LCCN 2011015196

Title	Author	Edition	Publisher	Publication Date	Format	Cataloging Source	Authentication Code	Encoding Level
American nations : a history of the eleven rival regional cultures of North America	Colin Woodard	1	New York : Viking, 2011.	2011	Print book	DLC, DLC		Full
American nations : a history of the eleven rival regional cultures of North America	Colin Woodard	2	New York, NY : Penguin Books, 2012	2012	Print book	YDXCP, YDXCP		Full
American nations : a history of the eleven rival regional cultures of North America	Colin Woodard	3	New York : Viking, 2011.	2011	eBook	TEFOD, TEFOD		Full
American nations : a history of the eleven rival regional cultures of North America	Colin Woodard	4	New York ; London : Penguin, 2012, ©2011.	2012, ©2011	Print book	UKUOY, UKUOY		Min

Matching example



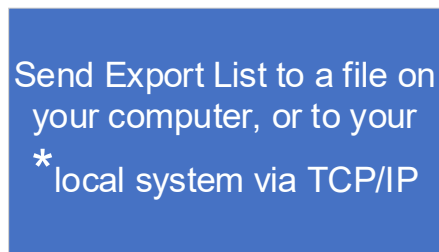
	Title	Author	Edition	Publisher	Publication Date	Format	Cataloging Source	Authentication Code	Encoding Level
	Symphony no. 3 ; Symphony for organ & orchestra	Aaron Copland; E. Power Biggs; Leonard...		New York : Sony Classical, [1997]	1997 1	eMusic	NAXOS, NAXOS		Full
	Symphony no. 3 ; Symphony for organ & orchestra	Aaron Copland; E. Power Biggs; Leonard...		New York : Sony Classical, [1997]	[1997] 2	Musical CD	ZJS, ZJS		Full
	COPLAND, A.: Symphony for Organ and Orchestra	Aaron Copland; Naxos Digital Services US		Hong Kong : Naxos Digital...	uuuu 3	eMusic	COO, COO		Min
	Symphony no. 3 ; Symphony for organ and orchestra	Aaron Copland; E. Power Biggs; William Flanagan...		New York, NY : Sony, ©1997	©1997 4	Musical CD	Nz, UX1		Min

Copy cataloging workflow



Repeat for each title, then

* Simplified role only




Retrieving this record



OCLC Number: 783520756

WorldCat Holdings

 Print book

My Library: Held

[Other Libraries: 125](#)

OCLC Number:	783520756
LCCN:	2012008270
Title:	What are cirrus clouds?
Alternate Title:	Cirrus clouds
Author:	Lynn. Peppas
Publisher:	New York, N.Y. : Crabtree Pub., ©2012.
Publication Date:	©2012
Physical Description:	24 pages : color illustrations ; 22 cm.

And adding this local data

Add Local Data to 783520756

Send to ▼ Set Holdings and Export Clear Fields

MAIN \$
OCLC Holding Library Code Purchase Price

Call Number Type
Dewey (092) ▼
Call Number Type Call Number Class Item Number/Cutter

Location
 Main Children's Dept. + -
Location Sub-location Shelving Location
551.576 PEPPA
Classification Part Item Part/Cutter Shelving Control Number
J 978556423412 1
Call Number Prefix Barcode/Piece Designation Copy Number

Public Note

Notes
Local ▼ Johnston Guided Reader Grant + -
Notes Local Note

Then Set Holdings and Export

Results in a local catalog record like this

100	1		Peppas, Lynn.
245	1	0	What are cirrus clouds? / ‡c Lynn Peppas.
246	3	0	Cirrus clouds
260			New York, N.Y. : ‡b Crabtree Pub., ‡c 2012.
300			24 pages : ‡b color illustrations ; ‡c 22 cm.
541			‡h 10.59
590			Johnston Guided Reader Grant
852			‡b Main ‡c Children's Dept. ‡h 551.576 ‡i PEPPA ‡k J ‡p 978556423412 ‡t 1

Only some fields are shown in this example

Questions?

<https://help.oclc.org>

The screenshot shows the top of the OCLC Support website. At the top left is the OCLC logo. To its right are two links: "System Status Dashboard" and "Contact OCLC Support", with the latter highlighted by a blue box and an orange arrow pointing towards the right. Below the navigation is a large blue banner with the text "Welcome to OCLC Support" and "How can we help you?". A search bar with a magnifying glass icon and the word "Search" is positioned below the banner. At the bottom of the banner area is a "Select a category" section with four icons and labels: "Discovery and Reference" (magnifying glass over a document), "Library Management" (document with a checkmark), "Metadata Services" (document with a pixelated pattern), and "Resource Sharing" (two documents with arrows).

OCLC support regions

Region	Location	Contact information
Asia Pacific	OCLC Asia Pacific 6565 Kilgour Place Dublin, Ohio 43017 US	O: +1-614-764-6009 Send an email Submit/View requests
Australia and New Zealand Support availability	OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU	T: 1300 260 795 (local call w O: +61 (0) 3 9929 0800 Send an email Submit/View requests
United States	OCLC Support—United States 6565 Kilgour Place Dublin, Ohio 43017 US	T: 1-800-848-5800 (toll free in USA and Canada) O: +1-614-793-8682 Send an email Submit/View requests

Thank you!

When you exit Webex, you will be directed automatically to an evaluation survey.

- Select Instructor: Rick Newell
- Select Category: Cataloging and Metadata
- Select Course: Simplified cataloging