WorldShare Record Manager: Simplified cataloging

Rick Newell

Senior Product Trainer

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

OCLC

Compare full cataloging to simplified

Full cataloging

Compare full cataloging to simplified

Simplified cataloging

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

📙 Print book

WorldCat Holdings

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 ⓘ	

OCLC

Roles

If your library has a CatExpress subscription:

User name must have "CatExpress Simplified" or "CatExpress Basic" role

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**

Copy cataloging workflow

Search WorldCat to find a record matching your item

→

Optional:
*Add Local Data
such as call number and barcode

→

Set Holding and Export

→

Optional:
***Send to Label Print List**

Repeat for each title, then

* Simplified role only

Send Export List to a file on your computer, or to your
*local system via TCP/IP

Optional:
*Print labels

OCLC
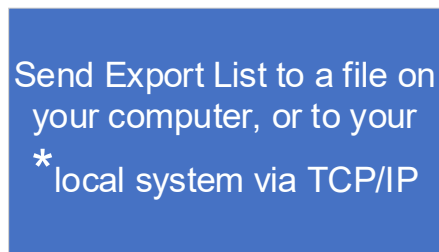
Match records to items: focus on these fields

- 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

OCLC

Matching example

Published 2011
viii, 371 p. ; 24 cm.

ISBN 9780670022960
LCCN 2011015196

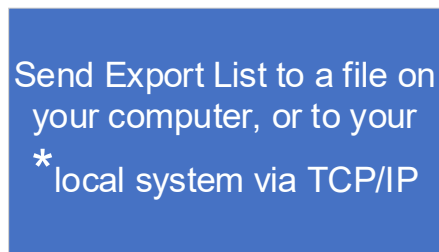|	Title	Author	Edition	Publisher	Publication Date	Format	Cataloging Source	Authentication Code	Encoding Level
①	American nations : a history of the eleven rival regional cultures of North America	Colin Woodard		New York : Viking, 2011.	2011	Print book	DLC, DLC		Full
②	American nations : a history of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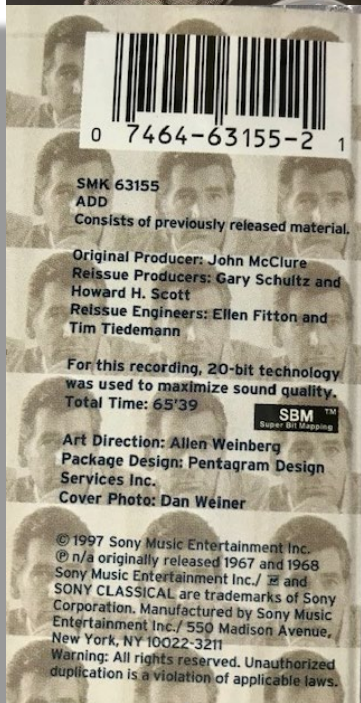
OCLC

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

Search WorldCat to find a record matching your item	*Optional*: *Add Local Data* such as call number and barcode	**Set Holding and Export**	*Optional*: **Send to Label Print List**

Repeat for each title, then

* Simplified role only

Send Export List to a file on your computer, or to your *local system via TCP/IP

Optional: *Print labels

OCLC

Retrieving this record

OCLC Number: 783520756

📙 Print book

WorldCat Holdings

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

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

OCLC

Questions?

https://help.oclc.org

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

OCLC