

WorldShare® Record Manager

Edit WorldCat bibliographic records

Mary Alice Robinson

Sr. Product Trainer

OCLC



1

Topics

- Set user preferences
- Edit bibliographic records
- Use the Save In-Progress file
- Set / delete holdings
- Export bibliographic records



2

2

Request access to Record Manager

WorldShare® Record Manager

Overview Resources **Ordering**

[Need support or training?](#)

Already have an OCLC Cataloging and Metadata Subscription?

WorldShare Record Manager is available to anyone with a current cataloging subscription. To request access, please complete and submit the form below.

First Name

Not a cataloging subscriber?

If you are interested in learning more about starting a subscription, **take the first step today** and we'll contact you.

[Learn more about an OCLC Cataloging and Metadata Subscription](#)

Contact us

Connexion browser – EOL
April 30, 2024

Connexion client
– no EOL set

<https://www.oclc.org/en/worldshare-record-manager/ordering.html>



3

3

User Preferences

0	Metadata	Acquisitions	Licenses	Circulation	Interlibrary Loan	Analytics
<div style="display: flex;"> <div style="width: 30%;"> <p>Record Manager</p> <p>Search</p> <p>Data Type Bibliographic Records</p> <p>Scope All WorldCat</p> <p>Index Title</p> <p>Term(s) ?</p> <p><input type="text"/></p> <p>Search Clear</p> <p>Advanced Search</p> <p>Create Record</p> <p>Record Work Lists</p> <p>Export Lists</p> <p>Toolbox</p> <p>User Preferences</p> </div> <div style="width: 70%;"> <p>User Preferences</p> <p>Save Discard Page Changes</p> <ul style="list-style-type: none"> Exporting - Authority Records Exporting - Bibliographic Records Searching - Advanced Searching - Basic Working with Records </div> </div>						



4

4

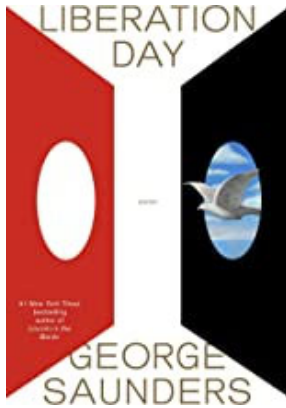
Why edit bibliographic records?

- To add **local fields** and then **export** to your local system (non-WMS libraries)
- To add **Local Bibliographic Data (LBD)** (WMS libraries and all WorldCat **Discovery** users)
- To make corrections / enhancements to the WorldCat record which you'll **Replace**
- To **Create a new WorldCat record** when one doesn't exist

Edit bibliographic records

- **Compare** two bibliographic records side by side
- Access **MARC field help / RDA field help**
- Add, edit, move, and delete variable fields
- View / edit the **008** and **LDR**
- **Reformat** and **Validate** a record
- Use **Undo**

New title #1



Title: Liberation day

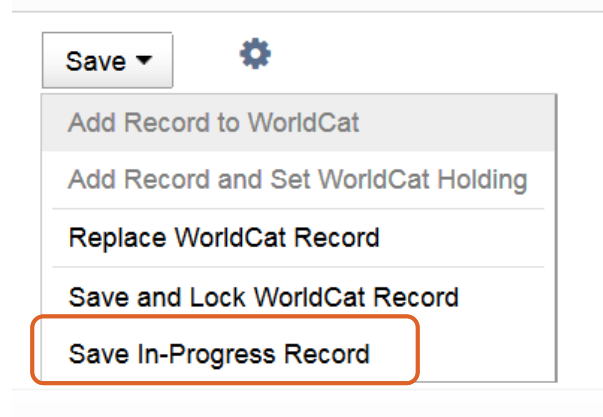
Author: George Saunders

Publisher: New York: Random House [2022]

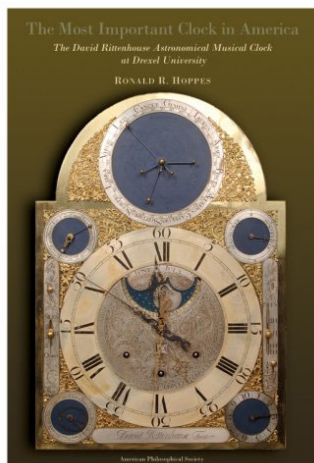
ISBN: 9780525509592

Save File

- Online
- Institution
- View in
**Connexion or
Record Manager**



New title #2



Title: The most important clock in America

Author: Ronald R. Hoppes

Publisher: Philadelphia: American Philosophical Society, 2009.

ISBN: 9781606189924

Reformat

- 006-3xx: sorted by all 3 characters of tag
- 4xx-9xx: sorted by tag group, but within group, input order preserved
- 029: always at bottom
- 049: always last 0xx field

(record automatically reformats when you validate or replace)

Validate

- Checks validity of tags, indicators, subfield codes
- Verifies all required fields are present
- Verifies that non-repeatable fields occur only once
- Checks structure of some fields (such as 020)
- Checks relationships between some elements

Replace

- **Saves** changes on the WorldCat record
 - Use when adding, editing fields that are not just for local use
 - Use after you control headings
- Follow **Expert Community Guidelines** and **Bibliographic Formats and Standards, Ch.5**
- See **documentation** and **training** for details

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager

Why Maintain Holdings?

- Public / Researcher discovery
- WorldShare® ILL
- Collection Evaluation
- WorldCat® Discovery Services
- WorldShare® Management Services (WMS)

Set WorldCat Holding

Non-WMS libraries

Record ▾ Advanced Action Save ▾ Set Holding and Export

Set WorldCat Holding

Delete WorldCat Holding

Save ▾ ⚙

Add Record to WorldCat

Add Record and Set WorldCat Holding

Replace WorldCat Record

Save and Lock WorldCat Record

Save In-Progress Record

Set Holding Audience Level

WMS libraries

Record ▾ Advanced Action Save ▾ Set Holding Audience Level and Export

Set Holding Audience Level to ▾

Delete WorldCat Holding

Derive Bibliographic Record ▾ Level: Not Held

Save ▾ Set Holding Audience Level and Export

Add Record to WorldCat

Add Record and Set Holding Audience Level

Replace Bibliographic Record

Save and Lock Bibliographic Record

Save In-Progress Record

Bulk set / delete holdings

Non-WMS libraries

WMS libraries

Record Manager

Search

Data Type: Bibliographic Records

Scope: All WorldCat

Index: OCLC Number

Term(s): 1

Record Work Lists

Bibliographic - Record Work List

Record Action(s): Set WorldCat Holding(s)

Manually enter or update up to 10,000 OCLC

Create Record

Record Work Lists

Record Manager

Search

Data Type: Bibliographic Records

Scope: All WorldCat

Index: ISBN

Term(s):

Record Work Lists

Bibliographic - Record Work List

Record Action(s): Set Holding Audience Level to target records

Manually enter or update up to 10,000 OCLC num

Create Record

Record Work Lists

Export records

Print Edit Record Advanced Action Save Set Holding and Export

OCLC Number

Print book

Other Records Linked to

Bibliographic Record

Clear Selections

LDR

001

005

008

010

Record dropdown menu:

- Set WorldCat Holding
- Delete WorldCat Holding
- Derive Bibliographic Record
- Bibliographic Constant Data
- LHR
- Change Display to Text View
- Change Material Type
- Control All Headings
- Add Equivalent Subject Headings
- Reformat
- Validate
- Send to
 - Export List...
 - Label Print List...
 - Local System (via TCP/IP)
- Compare...
- Send Record Change Request...
- View in WorldCat Discovery

Questions?

<https://help.oclc.org>

System Status Dashboard Contact OCLC Support

Welcome to OCLC Support
How can we help you?

Search

Select a category

- Discovery and Reference
- Library Management
- Metadata Services
- Resource Sharing

OCLC support regions

Region	Location	Contact information
Asia Pacific	OCLC Asia Pacific 6565 Kilgour Place Dublin, Ohio 43017 US	Or: +1-614-764-6009 Send an email Submit/view requests
Australia and New Zealand	OCLC Support—Australia and New Zealand Level 8, 310 King Street Melbourne 3000, Victoria AU	T: 1300 260 795 (local call v) Or: +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) Or: +1-614-793-8682 Send an email Submit/view requests

<https://oclc.org/support>

17

Thank You!

Please remember to fill out the evaluation for this class

- Instructor: Mary Alice Robinson
- Category: Cataloging and Metadata
- Class name: Edit WorldCat bibliographic records

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)

18