WorldShare® Record Manager

Create and replace WorldCat bibliographic records

Introduction

At the end of this course, **Create and replace WorldCat bibliographic records**, learners will be able to create a new bibliographic record from a work form; derive a new bibliographic record from an existing record; upgrade an abbreviated or minimal level bibliographic record; replace a WorldCat bibliographic record; and access help and documentation on when to input a new WorldCat record, and guidelines for replacing WorldCat records.

Before creating a new WorldCat record

- First, do a thorough search in WorldCat.
- If in doubt whether you've found a matching record, refer to **Bibliographic Formats and Standards, Ch. 4 When to Input a New Record.**

    - 4.1 General guidelines
    - 4.2 Field by field guidelines
- If no matching bibliographic record exists in WorldCat, and you've determined you need to create a new record:
    - Follow current cataloging practices, e.g., *Resource Description & Access* (RDA).
    - Refer to **Bibliographic Formats and Standards, Ch. 2 Online Cataloging.**

Create a new WorldCat record from a work form

- From the left navigation bar, select **Create Record**
    - Select Type: **MARC21 View** or **Text View.**
    - Select Format: **AACR2** or **RDA.**
    - Select Material Type Template: **Book, etc.**
    - Optionally, apply **constant data.**
    - Click **Create.**
- Enter information and edit the record as appropriate.
- To add the new record to WorldCat, from the **Save** menu, click **Add Record to WorldCat.**
  OR
- To add the new record to WorldCat and set your holdings, from the **Save** menu, click **Add Record and Set WorldCat Holding,** or for WMS libraries, click **Add Record and Set Audience Level.**

Derive a new WorldCat record from an existing record

Use Derive to copy data from an existing WorldCat bibliographic record to a new record (for example, for a different edition or a different physical format).

- Retrieve an existing WorldCat bibliographic record.
- From a list of records, click **Derive**, OR while viewing a single bibliographic record, click the **Record** menu, click **Derive Bibliographic Record,** and then click **Derive**, **Derive with Default Constant Data** or **Derive and Preview Constant Data.**
- If needed, from the **Record** menu, click **Change Material Type.**
- Edit the record as appropriate
- To add the new record to WorldCat, from the **Save** menu, click **Add Record to WorldCat.**
  OR
- To add the new record to WorldCat and set your holdings, from the **Save** menu, click **Add Record and Set WorldCat Holding,** or for WMS libraries, click **Add Record and Set Holding Audience Level.**
- To save the record to your institution's online save file, from the **Save** menu, click **Save In-Progress Record.**

Replace WorldCat bibliographic records

- Saves changes to the **WorldCat** record.
- If you control headings and / or edit a record, you must **Replace** for the changes to be retained on the WorldCat bibliographic record.
- Follow **Expert Community Guidelines** to see which fields you can edit, and which records you can replace.
  https://help.oclc.org/WorldCat/Metadata_Quality/Expert_community
- While viewing the edited bibliographic record, go to **Save > Replace Bibliographic Record.**
- Your **OCLC** symbol will be added to **040 $d**

Upgrade WorldCat bibliographic records to a higher Encoding Level

(ELvl) **Encoding level (ELvl**) identifies the standard to which a record conforms:

- **Full-level cataloging** seeks to ensure inclusion of the essential data elements necessary to meet user needs; meets the requirements of RDA Core or AACR2 second-level description. Full-level cataloging uses *ELvl* code *blank*
- **Minimal-level cataloging** represents the minimum data necessary to identify an item. Meets the requirements of AACR2 first-level description, rule 1.0D1. Minimal-level cataloging uses *ELvl* codes *7*

- **Abbreviated-level cataloging -** Brief records that do not meet the requirements of minimal-level cataloging specifications. Abbreviated-level cataloging uses *ELvl* code **3**

Upgrade records to become **full-level** records, or upgrade abbreviated and partial level records to **minimal-level** or **full-level** records. [3]

Encoding Level	Definition	Action	Edit Encoding Level to
I	Full level input by OCLC participants	Edit as needed	blank
J	Deleted record	Upgrade to minimal level or full level	7 or blank
K	Minimal level input by OCLC participants	Upgrade to full level	blank
M	Added from a batch process	Upgrade to full level	blank
blank	Full level	Edit as needed	blank
1	Full level, material not examined	Upgrade to full level	blank
2	Less-than-full level, material not examined	Upgrade to minimal level or full level	7 or blank
3	Abbreviated level	Upgrade to minimal level or full level	7 or blank
4	Core level	Upgrade to full level	blank
5	Partial (preliminary) level	Upgrade to minimal level or full level	7 or blank
7	Minimal level	Upgrade to full level	blank

[3] *Requires full-level or higher cataloging authorizations or roles.*
- *Exceptions for editing encoding level with MARC encoding level codes include **BIBCO** records (i.e., with field 042 pcc) and **CONSER** records(i.e., with a CONSER code in field 042).*

- ***Encoding level 8**. Prepublication monograph level records, including Cataloging-in-Publication (CIP) program records: With cataloging full-level authorization (Connexion) or full role (Record Manager), you may add or edit any field in these records, but you cannot change the encoding level value itself (for pcc records). Do **not** edit fields 010, 040, national call number fields (except to modify date of publication if necessary), or field 263 in CIP records.*

For editing capabilities for non-PCC records see Bibliographic Formats and Standards 5.2.2 Editing capabilities for non-PCC records.

For editing capabilities for PCC records see Bibliographic Formats and Standards 5.2.3 Editing capabilities for PCC records.

Resources

Expert Community Guidelines
https://help.oclc.org/WorldCat/Metadata_Quality/Expert_community/Guidelines_for_experts?sl=en

Bibliographic Formats and Standards
https://www.oclc.org/bibformats/en.html

March 26, 2024

MARC21 Bibliographic Data, National Level Full & Minimal Requirements
https://www.loc.gov/marc/bibliographic/nlr/

Test your knowledge

1. List two reasons why it is important to search WorldCat thoroughly before adding a new record to WorldCat.

2. For each of the following fields, write M, R or O to indicate if it is Mandatory (M), Required if applicable (R), or Optional (O) for Encoding level Full and Minimal records. (See Input standards for each field in Bibliographic Formats and Standards)
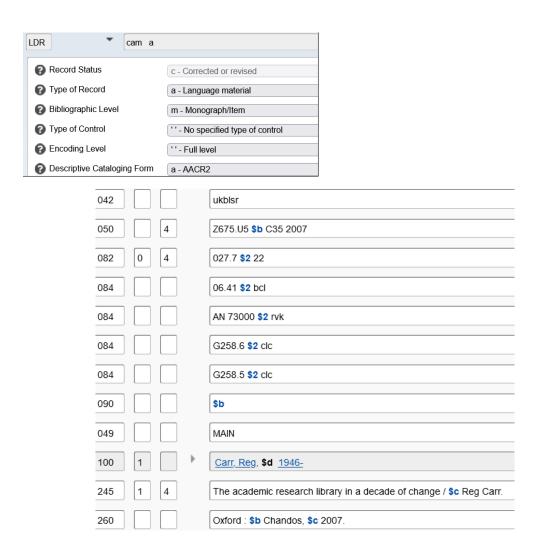
Field	Encoding Level <blank> (Full level)	Encoding Level 7 (Minimal level)
Call number (050, 082, etc.)		
1xx (Main entry)		
240 (Uniform title)		
245 (Title statement)		
246 (Varying form of title)		
260 / 264 (Publication, etc.)		

3. Use section 4.1 and 4.2 of *Bibliographic Formats and Standards* (https://www.oclc.org/bibformats/en/input.html) to answer these two questions:
    a. True or False: If the book you're cataloging has an ISBN that's not in the record you found in WorldCat, you should input a new record.
    b. True or False: If you are cataloging an audio compact disc but the closest match you can find in WorldCat is for an audio cassette, you should input a new record.

4. You have searched WorldCat, and the only record that matches your item reads in part:

    ```
    040    UAB $b fre $c UAB
    020    0205605451
    020    9780205605453
    050 4  PE1417 $b .O57 2009
    090    $b
    049    TQ@A
    245 00 One world, many cultures /$c [édité par] Stuart Hirschberg, Terry Hirschberg.
    250    7th ed.
    260    New York ; $a Toronto : $b Pearson Longman, $c c2009.
    300    xvi, 527 p. : $b ill., cartes ; $c 23 cm.
    504    Comprend des réf. bibliogr. et des index.
    ```
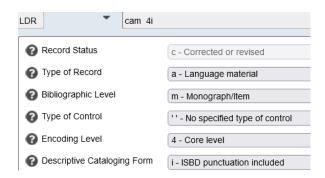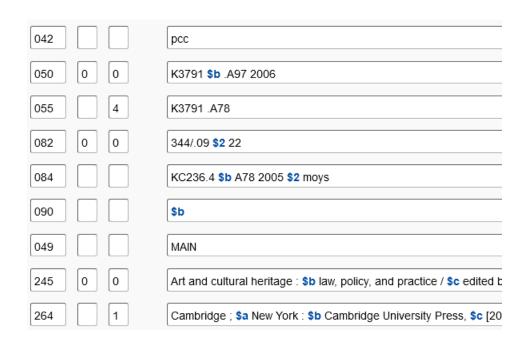
    Answer these questions:

       a. How can you determine that the language of cataloging for this record is not English? **b.** If your library catalogs in English, can you input a new WorldCat bibliographic record in English if one doesn't already exist?

5. True or False: When you are creating original records in Record Manager, you must enter your OCLC symbol in field 040, subfields $a and $c.

6. What are two ways of creating a new bibliographic record in Record Manager?

7. You have found a bibliographic record that matches the item you are cataloging, but it contains only MeSH (Medical Subject Headings) and your library uses LC Subject Headings. What should you do?
   a. Delete the Medical Subject Headings and add LC Subject Headings.
   b. Add LC Subject Headings if possible, but do not delete the MeSH.
   c. Create a new WorldCat bibliographic record.

8. True or False: You can edit and replace any WorldCat bibliographic record with a Cataloging Full role in Record Manager.

9. What values for ELvl should OCLC full cataloging libraries use for Full level records?

10. What value for ELvl should OCLC full cataloging libraries use for Minimal level records?

11. Respond to each situation below, assuming you have a full-level cataloging role in Record Manager:

   a. You find a record coded level **7**, which is missing the appropriate 240, 246, and 6XX fields. Can you "fix" this record yourself?
   b. You find a record coded level 3, with an incomplete title and missing several useful fields. Can you "fix" this record yourself?
   c. You find a record coded level **blank**, with a typo in the 520 field. Can you "fix" this record yourself?
   d. You find a record coded level **blank** with a typo in the 246 field. Can you "fix" this record yourself?

12. Can you replace this record through:
   a. Minimal level upgrade (Yes or No)
   b. Database enrichment (Yes or No)
   c. Add / edit fields not on database enrichment table (Yes or No)

LDR	▼	cam a

❓ Record Status	c - Corrected or revised	
❓ Type of Record	a - Language material	
❓ Bibliographic Level	m - Monograph/Item	
❓ Type of Control	' ' - No specified type of control	
❓ Encoding Level	' ' - Full level	
❓ Descriptive Cataloging Form	a - AACR2	

Tag	Ind1	Ind2	Content
042			ukblsr
050		4	Z675.U5 $b C35 2007
082	0	4	027.7 $2 22
084			06.41 $2 bcl
084			AN 73000 $2 rvk
084			G258.6 $2 clc
084			G258.5 $2 clc
090			$b
049			MAIN
100	1		▸ Carr, Reg, $d 1946-
245	1	4	The academic research library in a decade of change / $c Reg Carr.
260			Oxford : $b Chandos, $c 2007.

13. Can you replace this record through:
   a. Minimal level upgrade (Yes or No)
   b. Database enrichment (Yes or No)
   c. Add / edit fields not on database enrichment table (Yes or No)

LDR	▼	cam 4i

❓ Record Status		c - Corrected or revised
❓ Type of Record		a - Language material
❓ Bibliographic Level		m - Monograph/Item
❓ Type of Control		' ' - No specified type of control
❓ Encoding Level		4 - Core level
❓ Descriptive Cataloging Form		i - ISBD punctuation included

042			pcc
050	0	0	K3791 $b .A97 2006
055		4	K3791 .A78
082	0	0	344/.09 $2 22
084			KC236.4 $b A78 2005 $2 moys
090			$b
049			MAIN
245	0	0	Art and cultural heritage : $b law, policy, and practice / $c edited b
264		1	Cambridge ; $a New York : $b Cambridge University Press, $c [20

14. Can you replace this record through:

      a. Minimal level upgrade (Yes or No)
      b. Database enrichment (Yes or No)
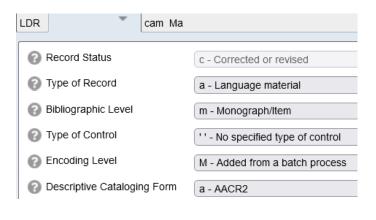   c. Add / edit fields not on database enrichment table (Yes or No)

LDR	▼	cam Ma
❓ Record Status		c - Corrected or revised
❓ Type of Record		a - Language material
❓ Bibliographic Level		m - Monograph/Item
❓ Type of Control		' ' - No specified type of control
❓ Encoding Level		M - Added from a batch process
❓ Descriptive Cataloging Form		a - AACR2

040			NYBEP $b eng $e pn $c NYBEP $d OCLCQ $d E7B $d OCLCO $d OCLCQ
020			9781606494127 $q (electronic bk.)
020			$z 9781606494110 $q (pbk.)
024	7		10.4128/9781606494127 $2 doi
050		4	HF1379 $b .C952 2012
082	0	4	382 $2 23
090			$b
049			MAIN
100	1		Czinkota, Michael R.
245	1	0	As I was saying : $b observations on international business and trade $n Volume 1 / $c Michael R. Czinkota ; illustrations by David Clark.

15. Can you replace this record through:

    a. Minimal level upgrade (Yes or No)
    b. Database enrichment (Yes or No)
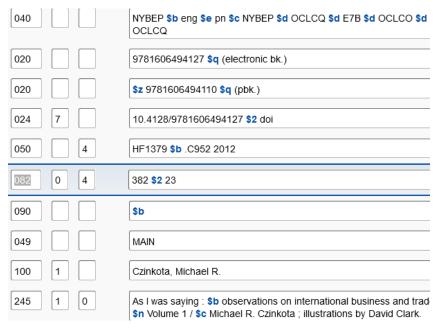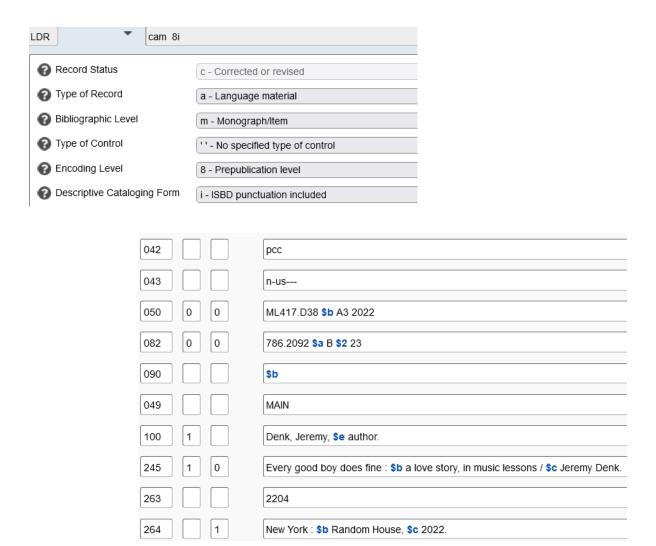   c. Add / edit fields not on database enrichment table (Yes or No)

LDR	▼	cam 8i

	Field	Value
❓	Record Status	c - Corrected or revised
❓	Type of Record	a - Language material
❓	Bibliographic Level	m - Monograph/Item
❓	Type of Control	' ' - No specified type of control
❓	Encoding Level	8 - Prepublication level
❓	Descriptive Cataloging Form	i - ISBD punctuation included

Tag	Ind1	Ind2	Field
042			pcc
043			n-us---
050	0	0	ML417.D38 $b A3 2022
082	0	0	786.2092 $a B $2 23
090			$b
049			MAIN
100	1		Denk, Jeremy, $e author.
245	1	0	Every good boy does fine : $b a love story, in music lessons / $c Jeremy Denk.
263			2204
264		1	New York : $b Random House, $c 2022.

Answers

1. You should search WorldCat before adding a new bibliographic record to WorldCat to avoid introducing duplicate records. And if a record for a similar item exists, you may choose to derive a new record from it, rather than creating a new record from a blank work form.

2. For each of the following fields, write M, R or O to indicate if it is Mandatory (M), Required if applicable (R) or Optional (O) for Encoding level Full and Minimal records:

Field	Encoding Level <blank> (Full level)	Encoding Level 7 (Minimal level)
Call number (050, 082, etc.)	R	O
1xx (Main entry)	R	R
240 (Uniform title)	R	O
245 (Title statement)	M	M
246 (Varying form of title)	R	O
260 / 264 (Publication, etc.)	R	R

3. Use section 4.1 of *Bibliographic Formats and Standards* (https://www.oclc.org/bibformats/en/input.html) to answer these two questions:
   a. **False**: If the book you're cataloging has an ISBN that's not in the record you found in WorldCat, you should input a new record.

   b. **True**: If you are cataloging an audio compact disc but the closest match you can find in WorldCat is for an audio cassette, you should input a new record.

4. Parallel records are records for the same item or manifestation but in different languages of cataloging. They are not considered duplicates in WorldCat.
   a. The 040 field has a subfield $b with a code other than eng, and the 300 and 504 fields have non-English words.
   b. **Yes**. If your library catalogs in English, can you input a parallel record in English if one does not already exist.

5. When you are creating original records in Record Manager, you must enter your OCLC symbol in field **040**, subfields **$a** and **$c**.
   False: These are automatically entered when you create a new bibliographic record.

6. The two ways to create a new bibliographic record in Record Manager are:
   a. From a blank work form
   b. By deriving a new record from an existing record

7. You have found a bibliographic record that matches the item you are cataloging, but it contains only MeSH (Medical Subject Headings) and your library uses LC Subject Headings. What should you do?

    b. Add LC subject headings but do not delete the MeSH.

    And if possible, **Replace** the record so that other libraries can also benefit from the added headings. You should not delete the Medical Subject Headings (and replace the record) as other libraries use them. Lack of subject headings that your library uses does not justify creating a new WorldCat record

8. **False**: You can edit and replace any WorldCat bibliographic record with a Cataloging Full role in Record Manager.

    You can only edit and replace non-PCC (BIBCO and CONSER)**,** with the exception being that you can add or edit fields in PCC BIBCO records that are included in the enrichment table in BFAS 5.2.3.

9. OCLC full cataloging libraries should use ELvl **blank** for Full level records.

10. OCLC full cataloging libraries should use ELvl **7** for Minimal level records

11. Respond to each situation below, assuming you have a full-level cataloging role in Record Manager:
    a. You find a record with encoding level **7**, which is missing the appropriate 240, 246, and 6XX fields. Can you "fix" this record yourself?
        Yes, if the record is not a PCC (BIBCO or CONSER) record. You can also upgrade the record to **blank**, after adding these fields and other fields required for Full level records.

    b. You find a record with Encoding level **3**, with an incomplete title and missing several useful fields. Can you "fix" this record yourself?
        Yes

    c. You find a record with Encoding level **blank**, with a typo in the 520 field. Can you "fix" this record yourself?
        Yes, if the record is not a **PCC CONSER** record. Field **520** is included in the **enrichment table** in **BFAS 5.2.3.**

    d. You find a record with Encoding level **blank** with a typo in the 246 field. Can you "fix" this record yourself?
        Yes, if the record is not a PCC CONSER record.

	OCLC #	Minimal Upgrade	Database Enrichment	Add / edit other fields	Notes
12.	71542631	No	Yes	Yes	ELvl=blank (full); Field 042 does not contain PCC code
13.	60245454	No	Yes	No	ELvl= 4 with 042 pcc (full); Upgrade/change record only special authorization, except for database enrichment
14.	779696233	Yes	Yes	Yes	ELvl = M (less than full); no field 042
15.	1248598643	No	Yes	Yes	ELvl = 8 with 042 pcc.

Answers for 12-15 may be different based on current state of records in WorldCat