

Edit WorldCat bibliographic records

Introduction

This course provides the basic skills needed to work with bibliographic records in WorldShare® Record Manager. At the end of this course, learners will be able to set user preferences for bibliographic records; edit bibliographic records including adding and deleting fields; access MARC field help while viewing a bibliographic record; save a bibliographic record to the Save In-Progress file; set and delete holdings; and export bibliographic records.

User Preferences

Click **User Preferences** in the left navigation to view and edit preferences for working with records, searching, and exporting records. Click **Save** after making changes or click **Discard Page Changes** to revert to the previous settings.

User Preferences - Working with Records

- Click the **Working with Records** accordion and select the Bibliographic Records tab
 - Click the radio button to select
 - **Default Editor**
 - MARC21 View
 - Text View
 - **Default Record Format**
 - AACR2
 - RDA
 - Click the dropdown to select
 - **Default Classification Scheme**
 - Library of Congress
 - Dewey Decimal
 - National Library of Medicine
 - Click **Save** after making changes to any of the sections under Preferences

User Preferences – Searching - Basic

- Click the **Searching – Basic** accordion and select the Bibliographic Records tab
 - **One Search Result Only**
 - Click the checkbox **Open record for editing** to go straight to the bibliographic record instead of a results list
 - **Default Search Results Format**
 - Click the checkbox **Display condensed result list** to view search results in a columnar view as an alternative to the Enhanced search result list.
Note, you can easily switch between the two types of search result lists

by clicking the **View Enhanced Search Results / View Condensed Search Results** button on top of a results list.

- **Search Scope(s) for Bibliographic Records**
 - Click the check box to select which search scopes to display
- Click a **Search Scope Name** to customize the indexes to display, order of display, and default sort (except for Browse WorldCat).

User Preferences - Searching – Advanced

- Click the **Searching - Advanced** accordion
 - **One Search Result Only**
 - Click the checkbox **Open record for editing** to go straight to the bibliographic record instead of a results screen
 - **Language(s) of Cataloging**
 - Select one or more languages of cataloging
 - **Source of Cataloging**
 - Select **Any** or **DLC**
 - **Search Scope(s) for Bibliographic Records** – click checkbox to select which search scopes to display (only All WorldCat and My Library Holdings for Advanced)
 - Click a **Search Scope Name** to customize the indexes to display, order of display and default sort

User Preferences - Exporting - Bibliographic Records

- Click the **Exporting - Bibliographic Records** accordion
 - General tab:**
 - **Select Format**
 - MARC21 with MARC-8
 - MARC21 with UTF8-Unicode
 - MARCXML with UTF8-Unicode
 - MARC21 with MARC-8 and LHR
 - MARC21 with UTF8-Unicode and LHR
 - MARCXML with UTF8-Unicode and LHR
 - Dublin Core Simple with UTF8-Unicode
 - Dublin Core Qualified with UTF8-Unicode
 - OCLC Dublin Core Simple with UTF8-Unicode
 - OCLC Dublin Core Qualified with UTF8-Unicode
 - MODS with UTF8-Unicode
 - **Exclude Matching Field(s)**
 - Select tags, indicators, and subfields you want to exclude from exported records
 - If you include subfields, only fields with specified subfields will be excluded.
 - Click the green circle to add rows or the red circle to delete rows

- Example: to exclude all 938 and 029 fields, exclude 650 fields with second indicator 4 or 7, but retain 650 fields with other second indicator values:

Tag *	938	Ind 1	Any	Ind 2	Any	Subfield(s)		+	-
Tag *	029	Ind 1	Any	Ind 2	Any	Subfield(s)		+	-
Tag *	650	Ind 1	Any	Ind 2	4	Subfield(s)		+	-
Tag *	650	Ind 1	Any	Ind 2	7	Subfield(s)		+	-

- **Exclude Matching Subfield(s) in Matching Field(s)**
 - Select tags, indicators, and subfields for subfields you want to exclude from specific fields
 - Example: to exclude \$z from any 020 field:

Tag *	020	Ind 1	Any	Ind 2	Any	Exclude	Subfield(s) *	\$z	+	-
-------	-----	-------	-----	-------	-----	---------	---------------	-----	---	---

- **International tab:**
 - If you plan to export any records containing non-Latin content, select one of the three options for Non-Latin Content Exported:
 - All data with other scripts in 880 fields
 - Latin script only
 - Other scripts only
 - For Diacritic Character Usage, select Decomposed or Precomposed
 - Optional: Check box to **Warn before exporting bibliographic records that include unlinked non-Latin script fields.**
- **TCP/IP tab:**
 - If your ILS supports TCP/IP transfer of bibliographic records, enter Host Name and Port Number; and if your system requires it, select an authentication method
 - If your system requires it, select Connection Delay Wait Time, and Connection Attempts Maximum Number, Gateway Export Response Messaging.
- **Uniform Resource Identifiers (URIs) tab:**
 - Select **Name Heading Identity Services** for exported records
 - GND Authorities
 - LC/NACO Authority file
 - Select **Subject Headings Identity Services** for exported records
 - GND Authorities
 - LC/NACO Subject Authority file
 - MeSH Authorities

Edit WorldCat bibliographic records

Use these actions to edit existing WorldCat bibliographic records.

- Find the record you want to edit. Click the title, or click **Edit Record**
- In the left panel, Record Manager displays a history of records you have edited in the current session

Record Manager

Search

Data Type
Bibliographic Records

Scope
All WorldCat

Index
Title

Term(s) ?
building cognitive expertise

Search Clear
[Advanced Search](#)

✕ Close All Tabs

✕ Search: Title = building cognitive expertise (All...)

✕ Edit MARC 40624915

○ Edit MARC 227574683

Create Record

- If you navigate to next or previous records without making any edits, the Edit MARC tab in the left panel remains gray, and the OCLC number in the tab changes as you navigate.
- Any records you edit are identified with an orange circle. (For purposes of the edit history, deleting a field does not count as an edit).
- **Close All Tabs** button closes all open records, including any you have edited.

- **MARC Field Help:**
 - Variable fields: Right-click in any cell of desired field, then select **Field Help > MARC Field Help**. *Bibliographic Formats and Standards* for that field opens in a new browser window.
 - Guided entry fields (such as 008): Click > to expand field. Click the ? next to element name (such as Illustrations). *Bibliographic Formats and Standards* for that element opens in new browser window.
- Insert field below current field: Click the green circle
- Delete current field: Click the red circle
- Move field up: Click the up arrow
- Move field down: Click the down arrow
- Edit **guided-entry** fields:
 - In LDR (Leader), 006, 007, 008, 336, 337, 338 fields, click > to expand field
 - Use drop-down menus to select appropriate value for each element
 - When finished, click **Done**
- Subfield **delimiter**: Use \$

- **Compare bibliographic records**
 - While viewing a bibliographic record, select **Compare** from the Record drop-down menu.
 - From the **Compare Bibliographic Records** dialog:
 - Enter the **OLC number** for the bibliographic record you would like to compare against.
Or
 - Click **Find and Select Record**. From the Find and Select Bibliographic Record dialog:
 - Select a **Scope** and **Index** for your search.
 - Enter your **search term(s)**.
 - Click **Search**.
 - From the results list, locate the bibliographic record you would like to compare against and click **Select Record**. The Compare Bibliographic Records dialog appears with the OLC number for your selected bibliographic record.
 - Click **Compare**. The Compare Records screen displays the two records side-by-side, with fields aligned for direct comparison.
- **Reformat** deletes empty fields, and sorts variable fields into numerical order:
 - 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 is always last 0xx field
 - To reformat, from the **Record** menu, click **Reformat**
- **Validate** verifies:
 - Validity of tags, indicators, and subfield codes
 - All required fields are present
 - Non-repeatable fields occur only once
 - Structure of some fields (such as 020)
 - Relationship between some elements
 - Validate occurs automatically when you **Replace** a WorldCat record or add a new record
 - To manually invoke validation, from the **Record** menu, click **Validate**
 - Validation error messages display below the field with an error
 - If record passes validation, "**Validated the record**" displays at the top of the record

Save In-Progress file

The **Save In-Progress** file is an online file accessible to everyone in your library, using Record Manager and Connexion.

- Records remain in the save file until you delete them, or until you take an action such as replacing the record or adding a new record to WorldCat.
- Using the **Save In-Progress** file is optional. Alternatively, you may work directly with the record (editing, setting holdings, exporting, etc.) after retrieving it from WorldCat.
- To save a record to the **Save In-Progress** file:
 - From the **Save** menu, select **Save In-Progress Record**
 - OR, from the **Save** menu, select **Save and Lock Bibliographic Record**. Locking a WorldCat bibliographic record prevents any other OCLC member from replacing the record while you have it locked. Locks expire in 14 days, but the record remains in the save file. You may re-save the record to extend the lock.
 - Optional: select a Workflow Status, and enter My Status (free text)
 - Click **Save**.
- To search for save file records:
 - From the left navigation bar, select **Saved – In Progress** from the **Scope** dropdown
 - Select index and enter your search terms, then click **Search**.
 - To retrieve all records in the save file, select any index, and enter * (asterisk) in the search terms box, and click **Search**.

Set and delete holdings*

Set WorldCat holdings for a MARC 21 bibliographic record so that you can:

- Maintain your WorldCat holdings
- Associate the record with your library; for example, because you have added the record to a local catalog
- To set holdings:
 - While viewing a bibliographic record:
 - Go to the **Record** menu and select **Set WorldCat Holding**, or, for WMS libraries, select **Set Holding Audience Level to > All Users, My Library Users, My Authenticated Users, My Library Staff**. Your OCLC symbol is added to the record. Alternatively, you may select **Set Holding and Export**, or for WMS libraries, **Set Holding Audience Level and Export**. Your OCLC symbol is added to the record and the **Add to Bibliographic records Export List** displays. (See below for Export options).
- To delete holdings:
 - While viewing a bibliographic record:
 - Go to the **Record** menu and select **Delete WorldCat Holding**. Your OCLC symbol is deleted from the record.

**For WMS libraries, holdings are set on WorldCat records automatically when you add local holdings records in Record Manager, Acquisitions or Circulation.*

Export Bibliographic Records**

- There are two options for exporting MARC 21 bibliographic records and authority records
 - **Export a single record at a time** to your local system through a **TCP/IP** connection (directly if your system allows this and you have added your settings in User Preferences).
 - To export a single record at a time to your ILS through a TCP/IP connection: click **Record > Send to > Local System (via TCP/IP)**
 - **Send to Export List.** You will later download this export list (using your Web browser) to your local computer or a network drive and load this file into your ILS using your ILS procedures. Or you may send the records in the list to your Local System through TCP/IP
 - To add records to an export list, then later download the list and load it into your ILS or send via TCP/IP:
 - Click **Record > Send to > Export List.**
 - Add records to an existing list
 - OR create a new list:
 - Click **New List**
 - Enter a name
 - Optional: select **Make Default**. This list will then automatically be selected when you send a record to the export list. Appears at the top of the export lists.
 - Optional: select **My List** to keep the list restricted to yourself. When not selected, the list is shared institution wide.
 - Click **Create and Add to List**
 - When you are ready to download the export list:
 - From the left navigation bar, click **Export Lists**
 - Click **Bibliographic** (if not already selected)
 - Click the list name you want to download
 - Click **Export > Send to My Computer**. All records in the list will be exported. Use your Web browser's procedures to save the file to your desired location.
 - Or select **Export > Send to Local System (via TCP/IP)**. All records in the list will be exported directly into your local system.
 - Optional: to delete records from a list, click the check box next to the records; then click **Delete**
 - Any export lists that have not been modified in the last 14 days are automatically deleted. To delete lists manually, ensure you are on the list of export lists (if necessary, click **Back to List**). Click the check box next to the list you want to delete, then click **Delete**.

*** Libraries using WorldShare® Management Services (Acquisitions, Circulation, and WorldCat Discovery) do not need to export records. When you receive an item in Acquisition or add a local holdings record in Record Manager, Circulation or Acquisitions, the item is visible in WorldCat Discovery.*

Keyboard shortcuts

Keyboard shortcuts are available for the following actions in Record Manager:

- Add Field Row (CNTRL+SHIFT+A)
- Copy Field Row (CNTRL+SHIFT+C)
- Go to Next MARC Record (CNTRL+SHIFT+8)
- Go to Previous MARC Record (CNTRL+SHIFT+7)
- Move Row Down (CNTRL+SHIFT+M)
- Move Row Up (CNTRL+SHIFT+U)
- Move LHR to Different WorldCat Record (CNTRL+SHIFT+2)
- Paste Field Row (CNTRL+SHIFT+G)
- Remove Controlled Heading (CNTRL+SHIFT+B)
- Send to Export List (CNTRL+SHIFT+6)
- Send to Label List (CNTRL+SHIFT+5)
- Send to Local System (via TCP/IP) (CNTRL+SHIFT+4)

Resources

OCLC Cataloging Comparison <https://www.oclc.org/go/en/oclc-cataloging-application-comparison.html>

Request access to Record Manager <https://www.oclc.org/en/worldshare-record-manager/ordering.html>

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

Metadata Quality https://help.oclc.org/WorldCat/Metadata_Quality

Record Manager Training
https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Training

Test your knowledge

1. You've discovered that when you send a record to the label print list from the bibliographic record, the NLM classification number in 060 is used, instead of the 050 LC classification number or instead of an 090 that you've added to the bibliographic record. How can you change the default classification number so that the LC class number is used?
2. When viewing a search results list of records, you can toggle back and forth from **condensed view** to **enhanced view**. Is it possible to always see the condensed view without having to toggle to it each time you do a search? If so, how?
3. When **exporting bibliographic records**, there may be certain fields and / or subfields that you always remove after the export. Is there a way to exclude these fields from exported records so that you do not have to delete them after the export? How?
4. If you edit a WorldCat bibliographic record in Record Manager, the changes you make are automatically reflected on the **WorldCat** record for others to view
 - a. True
 - b. False
5. How can you get **MARC Field Help** with determining the correct indicators for a 246 field you want to add to a record for a title that you've found on the top of each page of a book that is slightly different than the title on the title page and in the record's 245 field?
6. How can you **compare** two bibliographic records that look almost identical to choose the best record to use without printing them out?
7. **Validate** a bibliographic record does the following (select all that apply):
 - a. Checks validity of subfield codes
 - b. Checks validity of tags
 - c. Checks validity of indicators
 - d. Checks spelling
 - e. Checks that non-repeatable fields appear only once
 - f. Checks that the relationships between some fields are valid
 - g. Checks that the record is not a duplicate record
 - h. Checks the validity of subject headings
 - i. Saves the edits to the WorldCat record
8. **Reformat** a bibliographic record does the following (select all that apply):
 - a. Puts all variable fields in exact tag order
 - b. Puts just the 1xx through the 3xx fields in exact tag order.

- c. Puts just the 1xx through the 4xx fields in exact tag order.
 - d. Preserves the order of input for subject headings (6xx) and notes (5xx)
 - e. Moves subject headings and notes entered at the bottom of the record to the end of their respective tag groups
 - f. Deletes any unused (no data) field or subfields
 - g. Corrects spelling
 - h. Saves the edits to the WorldCat record
9. **Undo** does the following:
- a. Removes all changes you have made to the record
 - b. Removes all changes you have made to the record since the last validate
 - c. Removes only the last change you made to the record
10. You have withdrawn an older edition of an encyclopedia from your library and will replace it with a newer edition. After withdrawing the older edition from your library, what should you do about the record for it in WorldCat?
- a. Delete your holdings and search for a record for the new edition to add your holdings
 - b. Change the WorldCat bibliographic record to reflect the new edition
 - c. Nothing
11. You had two copies of a title but have withdrawn one copy from your library since it has been declared lost. What should you do about the record in **WorldCat**?
- a. Delete your holdings on the record
 - b. Delete the WorldCat bibliographic record
 - c. Nothing
12. Who can see records that you have added to your **Save In-Progress** file in Record Manager?
- a. Only the person who saves the record
 - b. Any staff at your institution logged into Record Manager
 - c. Any staff at your institution logged into Record Manager, Connexion browser, or Connexion client
 - d. Any staff at your institution logged into Record Manager, Connexion browser, Connexion client, or WorldCat Discovery
 - e. Anyone (including staff at other institutions) using Record Manager
13. How long will a record stay in the **Save In-Progress** file (select all that apply)?
- a. 14 days
 - b. Until you delete it from the save file
 - c. Until you export the record
 - d. Until you replace the record or add it to WorldCat

Answers

1. You can change the default classification number used in labels as well as when creating a local holdings record, by going to **User Preferences > Working with Records**. Select the tab, **Bibliographic Records** and then click the dropdown menu next to **Default Classification Scheme** and select your classification scheme.
2. You can set the default search results list format to display the **Condensed Result List** by going to **User Preferences > Searching – Basic**. Select the tab, **Bibliographic Records** and then for Default Search Results Format, click the checkbox **Display condensed result list**. Below that, you can specify the columns you wish to display by clicking the Display checkbox, and the order in which they appear by using the up and down arrows on the left. Your default will be applied when you do a basic or advanced search.
3. You can choose to delete certain fields or subfields within certain fields in exported bibliographic records by going to **User Preferences > Exporting – Bibliographic Records**. Under **Exclude Bibliographic Data, Exclude Matching Fields**, enter the **tags** and **optionally subfields** you want to exclude. Next, under **Exclude Subfields in Matching Fields**, enter the **Tag and Subfields** you wish to exclude.
4. b. **False**. If you edit a bibliographic record in Record Manager, the changes you make are not saved on the WorldCat record unless and until you **Replace** the record. If the changes would benefit everyone accessing the WorldCat record, follow the [Expert Community Guidelines](#) and [Chapter 5 of Bibliographic Formats and Standards](#) for editing and replacing WorldCat records.
5. To access MARC field help while viewing a bibliographic record in Record Manager, click the MARC tag, then right click, and select **Field Help > MARC Field Help**. If the record does not contain the MARC tag (e.g., a 246-Varying form of title), you will need to first add it (click the green circle on the field above and type in the tag). Then click in the tag, right click, and select **Field Help > MARC Field Help**.
6. To compare two bibliographic records in Record Manager, open the first record (click the title or **Edit** from the search results screen), and from the **Record** menu select **Compare**. On the **Compare Bibliographic Records** dialog box, enter the **OCLC number** for second record and click **Compare** to see the two records side by side. Alternatively, click **Find and Select Record** to do a search for a record to compare. From the results list, click **Select Record** and the OCLC number will be populated in the

Compare Bibliographic Records dialog box. Click **Compare** to see the two records side by side.

7. Validate does the following:

- a. Checks validity of subfield codes
- b. Checks validity of tags
- c. Checks validity of indicators
- e. Checks that non-repeatable fields appear only once
- f. Checks that the relationships between some fields are valid

8. Reformat does the following:

- b. Puts just the 1xx through the 3xx fields in exact tag order.
- d. Preserves the order of input for subject headings (6xx) and notes (5xx)
- e. Moves subject headings and notes entered at the bottom of the record to the end of their respective tag groups

9. Undo does the following:

- b. Removes all changes you have made to the record since the last validate

10. After withdrawing the older edition from your library, what should you do about the record for it in **WorldCat**?

- a. Delete your holdings on the record for the edition you are withdrawing and search for a record for the new edition to add your holdings

11. You have withdrawn one of two copies of a title. What should you do about the record in **WorldCat**?

- c. Nothing. If you still have one copy, you should not delete your holdings from the WorldCat record. However, if you are using WMS (WorldShare Management Services), you should delete the Local Holdings Record (LHR) for the copy you are withdrawing.

12. Who can see records that you have added to your **Save In-Progress** file in Record Manager?

- c. Any staff at your institution logged into Record Manager, Connexion browser, or Connexion client can see records in your **Save In-Progress** file. (Records added to the online save file in Connexion browser or client can also be viewed by any staff at your institution logged into Record Manager).

13. A record will stay in the **Save In-Progress** file:

- b. Until you delete it from the save file
- d. Until you replace the record or add it to WorldCat