Discover how to derive a local holdings record from a WorldCat bibliographic record or an existing local holdings record in WorldShare Record Manager.

Overview

You can derive a local holdings record by copying information from either the WorldCat bibliographic record (MARC 21 or Text View) or an existing local holdings record.

Note: A bibliographic record may contain a maximum of 10,000 local holdings records.

Derive a local holdings record from a WorldCat bibliographic record

Note: You can derive a local holdings record from either a MARC 21 WorldCat bibliographic record or a Text View bibliographic record.

1. From either the MARC 21 editor or the Text View editor, click **Record**.
2. From the Record drop-down menu, select **Derive** from the LHR flyout menu.
3. Update the content to describe your holdings for the item.
4. Edit the Summary field.
5. Click **Save**. A confirmation message will appear which states that the local holdings record has been added successfully.

If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 5.

Derive a local holdings record from a WorldCat bibliographic record for an institution

You can derive a local holdings record from a WorldCat bibliographic record for an institution if:

- Your institution is set up as an agent and has a list of other libraries for which they can do work.
- You have the **Cataloging_Agent role** assigned.

Contact [OCLC Support](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Local_holdings_records/Work_with_local_...) to set up your library as an Agent.

1. From either the MARC 21 editor or the Text View editor, click **Record**.
2. From the Record drop-down menu, select Derive LHR for Other Institution from the LHR flyout menu.

3. From the Derive LHR for Other Institution dialog, select the institution from which you want to derive a local holdings record using the Institution drop-down list or enter an institution name in the text field. This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field.

4. Click Derive LHR. An LHR template opens with fields 852 $a (institution symbol), 852 $b (default holding library code, and default values for other fields and tags prepopulated.

5. Edit the LHR template as needed and then click Save. A confirmation message will appear which states that the local holdings record has been added successfully.

   If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 5.

### Derive a local holdings record from an existing local holdings record

**Note:** You have to have a local copy of the item before you can derive a local holdings record.

1. From the MARC 21 editor, click the Call Number for the record in the LHRs accordion.
   Or
   Search for a local holdings record and then click the Call Number for the record on the search results screen.

2. From the LHR editor, click Record.

3. From the Record drop-down menu, select Derive from the LHR flyout menu.

4. Update the content to describe your holdings for the item.

5. Edit the Summary field.

6. Click Save. A confirmation message will appear which states that the local holdings record has been added successfully.

   If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 6.

### Derive a local holdings record from an existing local holdings record for an institution

You can derive a local holdings record from an existing LHR for an institution if:

- Your institution is set up as an agent and has a list of other libraries for which they can do work.
- You have the Cataloging_Agent role assigned.

Contact OCLC Support to set up your library as an Agent.

1. From the MARC 21 editor, click the Call Number for the record in the LHRs accordion.
   Or
   Search for a local holdings record and then click the Call Number for the record on the search results screen.

2. From the LHR editor, click Record.

3. From the Record drop-down menu, select Derive LHR for Other Institution from the LHR flyout menu.

4. From the Derive LHR for Other Institution dialog, select the institution from which you want to derive a local
holdings record using the Institution drop-down list or enter an institution name in the text field. This is an auto-
suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field.

5. Update the content to describe your holdings for the item.

6. Edit the Summary field.

7. Click **Save**. A confirmation message will appear which states that the local holdings record has been added
   successfully.

   If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 7.

Derive a local holdings record with default local holdings
record constant data applied

Note: This action can only be performed if a default local holdings constant data record has been selected. To select
a default local holdings constant data record, navigate to **Toolbox > Constant Data**.

1. From the MARC 21 editor, click the **Call Number** for the record in the LHRs accordion.
   Or
   Search for a local holdings record and then click the **Call Number** for the record on the search results screen.

2. From the LHR editor, click **Record**.

3. From the Record drop-down menu, select **Derive with Default Constant Data** from the LHR flyout menu.

   A confirmation message will appear with the name of the applied constant data record and the field(s) overlayed
   from the constant data record.

4. Click **Save**. A confirmation message will appear which states that the local holdings record has been added
   successfully.

   If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 4.

Derive a local holdings record using local holdings record
constant data preview

1. From the MARC 21 editor, click the **Call Number** for the record in the LHRs accordion.
   Or
   Search for a local holdings record and then click the **Call Number** for the record on the search results screen.

2. From the LHR editor, click **Record**.

3. From the Record drop-down menu, select **Derive and Preview Constant Data** from the LHR flyout menu.

   The Apply Constant Data screen allows you to:

   ◦ Preview the local holdings record with the local holdings constant data record applied. The overlayed constant
data record data is highlighted in blue. The hyperlinked LHR control number will direct you to the local
holdings record in the LHR editor.

   ◦ View the selected local holdings record constant data record. The hyperlinked constant data name will direct
you to the local holdings constant data record in the constant data record editor.

4. Select a **constant data record name** from the drop-down menu. Your default local holdings constant data record
   is selected by default, but any saved local holdings constant data record can be selected. This menu contains an
auto-suggest text field. Auto-suggestions for available local holdings constant data records start with the first keystroke in the text field.

5. Select the constant data fields to apply to the current record from the drop-down list.
   ◦ Fixed fields
   ◦ Variable fields
   ◦ Fixed and variable fields (default)

6. Select which **852 subfields** you would like to preserve from the Preserved 852 Subfields drop-down list. By default, $h Classification part and $i Item part are selected.

**Available 852 subfields**

   ◦ $a Location
   ◦ $b Sublocation or collection
   ◦ $c Shelving location
   ◦ $d Former shelving location
   ◦ $e Address
   ◦ $f Coded location qualifier
   ◦ $g Noncoded location qualifier
   ◦ $h Classification part
   ◦ $i Item part
   ◦ $j Shelving control number
   ◦ $k Call number prefix
   ◦ $l Shelving form of title
   ◦ $m Call number suffix
   ◦ $n Country code
   ◦ $p Piece designation
   ◦ $q Piece physical condition
   ◦ $s Copyright article-fee code
   ◦ $t Copy number
   ◦ $u Uniform Resource Identifier
   ◦ $x Nonpublic note
   ◦ $z Public note
   ◦ $2 Source of classification or shelving scheme
   ◦ $3 Materials specified

7. Click **Apply Constant Data**. A confirmation message will appear with the name of the applied constant data record and the field(s) overlayed from the constant data record.

8. Click **Save**. A confirmation message will appear which states that the local holdings record has been added successfully.

   If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 8.
Derive a local holdings record from another library's local holdings record

1. Search for a bibliographic record.
2. Click the Other Libraries link to open the WorldCat Holdings screen for the record.
3. Locate an institution that has LHR data associated with the record. The Holdings column will contain a hyperlink if the institution has associated LHR data.
4. Click the Local Holdings Available.
   - If the record has a single associated LHR, the LHR dialog opens.
   - If the record has multiple associated LHRs, the View Multiple LHRs screen opens. Click a call number or barcode to open the LHR dialog.
5. From the LHR dialog, click Derive LHR > Derive. The Derive Record screen opens.
6. Update the content to describe your holdings for the item.
7. Edit the summary field.
8. Click Save. A confirmation message will appear which states that the local holdings record has been added successfully.

If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 8.

Derive a local holdings record from another library's local holdings record for an institution

You can derive a local holdings record from another library's LHR for an institution if:

- Your institution is set up as an agent and has a list of other libraries for which they can do work.
- You have the Cataloging Agent role assigned.

Contact OCLC Support to set up your library as an Agent.

1. Search for a bibliographic record.
2. Click the Other Libraries link to open the WorldCat Holdings screen for the record.
3. Locate an institution that has LHR data associated with the record. The Holdings column will contain a hyperlink if the institution has associated LHR data.
4. Click the Local Holdings Available.
   - If the record has a single associated LHR, the LHR dialog opens.
   - If the record has multiple associated LHRs, the View Multiple LHRs screen opens. Click a call number or barcode to open the LHR dialog.
5. From the LHR dialog, click Derive LHR > Derive LHR for Other Institution. The Derive LHR for Other Institution Record dialog opens.
6. From the Derive LHR for Other Institution dialog, select the institution from which you want to derive a local holdings record using the Institution drop-down list or enter an institution name in the text field. This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field.
7. Click Derive LHR. The Derive Record screen opens.
8. Update the content to describe your holdings for the item.
9. Edit the summary field.
10. Click Save. A confirmation message will appear which states that the local holdings record has been added successfully.

   If the record was unable to be derived, an error message will appear. Correct any errors and repeat step 10.

Watch a video

Create and edit local holdings records for serials in MARC21 (14:06)
This video shows how to create and edit local holdings records for serials in MARC21 in WorldShare Record Manager.

Create and edit local holdings records for single part monographs in MARC 21 (7:24)
This video shows how to create and edit local holdings records for single part monographs in MARC21 in WorldShare Record Manager.

Create and edit local holdings records for multi-part monographs in MARC21 (11:16)
This video shows how to create and edit local holdings records for multi-part monographs in MARC 21 in WorldShare Record Manager.

Create and edit local holdings records for serials in text view (8:33)
This video shows how to create and edit local holdings records for serials in text view in WorldShare Record Manager.
Create and edit local holdings records for single part monographs in text view (5:18)
This video shows how to create local holdings records for single part monographs in text view in WorldShare Record Manager.

Create and edit local holdings records for multi-part monographs in text view (8:19)
This video shows how to create and edit local holdings records for multi-part monographs in text view.

Using record work lists to edit local holdings records (21:07)
This video demonstrates how to use the record work lists in WorldShare Record Manager to edit large numbers of local holdings records.