Record Manager account roles

Learn about the roles available for managing accounts in WorldShare Record Manager.

WorldShare Admin

For more information about roles and managing accounts, see WorldShare Admin, User management.

To view all available WorldShare roles, see WorldShare Admin, Roles.

Note: Please contact OCLC Support for if you need assistance as certain cataloging roles require participation in National Cooperative Cataloging Programs before they can be assigned.

Cataloging roles

- Cataloging Agent*
- Cataloging BIBCO
- Cataloging Bulk Edit
- Cataloging CONSER
- Cataloging Export
- Cataloging Full
- Cataloging Admin
- Cataloging Limited
- Cataloging National**

Cataloging role comparison

<table>
<thead>
<tr>
<th>ACTION</th>
<th>CATALOGING BIBCO</th>
<th>CATALOGING BULK EDIT</th>
<th>CATALOGING CONSER</th>
<th>CATALOGING EXPORT</th>
<th>CATALOGING FULL</th>
<th>CATALOGING ADMIN</th>
<th>CATALOGING LIMITED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add new master bibliographic records to WorldCat or replace existing</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
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</tr>
</tbody>
</table>

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

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<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>CATALOGING BIBCO</td>
</tr>
<tr>
<td>Apply scripts to LBD records in the record work list.</td>
<td></td>
</tr>
<tr>
<td>Apply scripts to LHR records in the record work list.</td>
<td></td>
</tr>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
<td></td>
</tr>
<tr>
<td>Can print labels.</td>
<td></td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td></td>
</tr>
<tr>
<td>Create BIBCO records (contain pcc in the 042 field)</td>
<td></td>
</tr>
<tr>
<td>Create</td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ROLES</td>
</tr>
<tr>
<td>--------</td>
<td>-------</td>
</tr>
<tr>
<td>CONSER records (contain one of the CONSER codes in field 042)</td>
<td></td>
</tr>
<tr>
<td>Delete users.</td>
<td></td>
</tr>
<tr>
<td>Enables visibility of the Metadata tab and its components (Manage Records, Manage Collections, My Apps)</td>
<td></td>
</tr>
<tr>
<td>Export bibliographic records, authority records, and lists of records using WorldShare Record Manager.</td>
<td></td>
</tr>
<tr>
<td>Manage LBD records in the record work list.</td>
<td></td>
</tr>
<tr>
<td>Manage LHR records in the record work list.</td>
<td></td>
</tr>
</tbody>
</table>

[https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Get_started/Account_roles](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Get_started/Account_roles)
<table>
<thead>
<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td></td>
</tr>
<tr>
<td>Read information about self via WorldCat Local/Discovery.</td>
<td></td>
</tr>
<tr>
<td>Read information about users, regardless of module (Circ, Acq, etc.)</td>
<td></td>
</tr>
<tr>
<td>Replace BIBCO records (contain pcc in the 042 field)</td>
<td></td>
</tr>
<tr>
<td>Replace CONSER records (contain one of the CONSER codes in field 042)</td>
<td></td>
</tr>
<tr>
<td>Retrieve and view users.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CATALOGING</th>
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<th>CATALOGING</th>
<th>CATALOGING</th>
<th>CATALOGING</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIBCO</td>
<td>BULK EDIT</td>
<td>CONSER</td>
<td>EXPORT</td>
<td>FULL</td>
<td>ADMIN</td>
<td>LIMITED</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>CATALOGING BIBCO</td>
<td>CATALOGING BULK EDIT</td>
<td>CATALOGING CONSER</td>
<td>CATALOGING EXPORT</td>
<td>CATALOGING FULL</td>
<td>CATALOGING ADMIN</td>
<td>CATALOGING LIMITED</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
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</tr>
<tr>
<td>security context contains all the information about a given user (especially what actions they can perform). This permission allows the user to perform actions on behalf of another user (patron).</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Update information about other users, regardless of module (Circ, Acq, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Update information about self via WorldCat Local/Discovery.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Update institution configuration information relating to authentication</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
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<td>CATALOGING BIBCO</td>
</tr>
<tr>
<td>and authorization.</td>
<td></td>
</tr>
<tr>
<td>Use the Forgot Password feature to get a new password.</td>
<td></td>
</tr>
<tr>
<td>View information about a user's accounts. In some circumstances this may include identifying information about accounts external to OCLC (e.g. where OCLC receives periodic patron updates from an external system, or where authentication is managed by an external system).</td>
<td></td>
</tr>
<tr>
<td>View and interact with a broad range of</td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ROLES</td>
</tr>
<tr>
<td>--------</td>
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</tr>
<tr>
<td></td>
<td>CATALOGING BIBCO</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>data and record types. Includes display of holdings information, search and display of records, viewing, adding and replacing of Local Holdings Records (LHRs), viewing, adding and replacing of records in the online save file, validation, heading control, and setting/deleting of institutional holdings</td>
<td>x</td>
</tr>
<tr>
<td>View My Library and export data.</td>
<td>x</td>
</tr>
<tr>
<td>View the LBD tab on the Record Work Lists screen.</td>
<td>x</td>
</tr>
<tr>
<td>View the LHR tab on the Record Work List screen.</td>
<td>x</td>
</tr>
</tbody>
</table>
For use of agent operations with WorldCat Metadata API.

** Assigned to National Libraries only. Contact OCLC Support if the role needs to be assigned.

## Authorities roles

- Authorities Canadiana Names French
- Authorities Canadiana Names French Deletes
- Authorities Canadiana Subjects
- Authorities Canadiana Subjects Deletes
- Authorities LC NACO Name Authority File
- Authorities Search Export
- Authorities Search Export Canadiana

## Authorities role comparison

Note: Add, replace, or lock LC operations only apply to LC Name records.

All Record Manager users can perform the following actions without an assigned role:

- Create a new authority record from the template or an existing bibliographic record
- Derive a new authority record from an existing authority record or the search results list
- Export a master authority record using a TCP/IP connection or by downloading the file through your browser
- Reformat or validate a master authority record
- Search or browse all available authority files, including the save file
- View authority records in all available authority files

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>AUTHORITIES CANADIANA NAMES FRENCH</td>
</tr>
<tr>
<td>Add</td>
<td>x</td>
</tr>
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<tr>
<td></td>
<td>AUTHORITIES CANADIANA NAMES FRENCH</td>
</tr>
<tr>
<td>Canadiana master record from save file</td>
<td></td>
</tr>
<tr>
<td>Add Canadiana record to authority save file and lock Canadiana master</td>
<td></td>
</tr>
<tr>
<td>Add Canadiana record to master file</td>
<td></td>
</tr>
<tr>
<td>Add LC master record from save file</td>
<td></td>
</tr>
<tr>
<td>Add LC record to authority save file and lock LC master</td>
<td></td>
</tr>
<tr>
<td>Add LC record to master file</td>
<td></td>
</tr>
<tr>
<td>Add new record to authority save file</td>
<td></td>
</tr>
<tr>
<td>Delete and supersede Canadiana record</td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>AUTHORITIES CANADIANA NAMES FRENCH</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>Delete Canadiana record</td>
<td></td>
</tr>
<tr>
<td>Delete save file record</td>
<td>x</td>
</tr>
<tr>
<td>Recall LC save file record</td>
<td>x</td>
</tr>
<tr>
<td>Recall LC save file record</td>
<td>x</td>
</tr>
<tr>
<td>Release Canadiana master</td>
<td>x</td>
</tr>
<tr>
<td>Release LC master lock</td>
<td>x</td>
</tr>
<tr>
<td>Replace Canadiana master</td>
<td>x</td>
</tr>
<tr>
<td>Replace existing Canadiana</td>
<td>x</td>
</tr>
<tr>
<td>Replace existing LC</td>
<td>x</td>
</tr>
<tr>
<td>Replace LC</td>
<td>x</td>
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<th>AUTHORITIES CANADIANA</th>
<th>AUTHORITIES LC NACO NAME</th>
<th>AUTHORITIES SEARCH</th>
<th>AUTHORITIES SEARCH</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NAMES FRENCH</td>
<td>NAMES FRENCH</td>
<td>SUBJECTS</td>
<td>SUBJECTS</td>
<td>AUTHORITY FILE</td>
<td>EXPORT</td>
<td>EXPORT CANADIANA</td>
</tr>
<tr>
<td>master record from save file</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Re-save save file record</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Submit existing save file record for review</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>