WorldShare Record Manager

Last updated: Mon, 27 Jan 2020 14:27:06 GMT

WorldShare Record Manager allows you to create new and enrich existing items in WorldCat with efficient, record-at-a-time metadata management for your physical and electronic materials using either a MARC 21 editor or a Text View editor. Plus, with Record Manager, you can set and delete WorldCat holdings and export bibliographic records.

**Get started**

Get started with WorldShare Record Manager.

- About Record Manager
- Record Manager account roles
- Add a privacy notice
- Create a Record Manager account
- Keyboard shortcuts
- Set or reset your password
- Sign in to Record Manager
- WorldShare Record Manager (Nederlands)

**Record Manager user preferences**

Learn how to set search, export, label, and record editor preferences.

- Exporting - Authority Records
- Exporting - Bibliographic Records
- Searching - Advanced
- Searching - Basic
- Working with Records

**Search**

Record Manager provides a variety of methods to search and browse WorldCat holdings. You can also set your search preferences to suppress authority and bibliographic search scopes and indexes.

- Advanced search
- Basic search

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

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Browse
- Expert search
- Saved - In Progress
- Search preferences
- Search results
- Search result record summary

- Authority records

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Record Manager supports the following authority records: Art & Architecture Thesaurus (AAT), Candiana, Library of Congress, Medical Subject Headings (MeSH), Dutch (NTA), Māori, and German (GND).

- Work with authority records
- Export authority records
- Record Manager Authorities Guide
- Keyboard shortcuts for authority records

- Bibliographic records

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Record Manager allows you to create new and enrich existing items in WorldCat using either a MARC 21 editor or a Text View editor.

- MARC 21 view
- Export MARC 21 records
- Text view
- Bulk actions

- Constant data

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With Record Manager, create constant data records for bibliographic and local holdings records to develop and maintain standards for use in all bibliographic or local holdings records, certain collections, or specific types of resources.

- Bibliographic
- Local holdings records

- Field strings

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When you are editing a MARC 21 WorldCat record or LBD information, you can save frequently used variable field information as a string that can be copied to other fields.

- Create a field string

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- Delete a field string
- Edit a field string
- Insert information into a field with a field string
- Save field information as a field string
- View the field strings library

- **My Labels**
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  You can create spine labels from information in an MARC 21 WorldCat bibliographic record or a local holdings records. Your list of labels is only viewable by you and not by other users in your institution.
  - About My Labels
  - Label Print Lists
  - Label Templates

- **Local bibliographic data**
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  Using local bibliographic data (LBD), you can add local information to a bibliographic record that is specific to your institution’s title; however, other institutions will not be able to see that information in the MARC 21 WorldCat record and your users will only see your institution’s LBD.
  - Bulk actions for local bibliographic data
  - Work with local bibliographic data

- **Local holdings records**
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  Using Record Manager, you can create and edit WorldCat local holdings records (LHRs). LHRs provide information about your item-specific holdings as well as lending and reproduction policies.
  - Bulk actions for local holdings records
  - Work with local holdings records

- **Text strings**
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  When you are editing a MARC 21 WorldCat record or local bibliographic data information, you can save frequently used variable information as a string that can be copied to other fields.

- **Reference**
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  Find additional resources for WorldShare Record Manager.
  - Brief guidelines for editing and replacing WorldCat master records

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager
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• Record Manager setup worksheet for Connexion browser users
• Searching WorldCat indexes: Quick reference
• Working with local bibliographic data
• WorldShare Record Manager guide for Shared Print Registration Service users

**WorldShare Record Manager release notes and known issues**

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Find WorldShare Record Manager release notes and known issues. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

- 2020 WorldShare Record Manager release notes
- 2019 WorldShare Record Manager release notes
- 2018 WorldShare Record Manager release notes
- Known issues

**WorldCat Matching release notes and known issues**

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Find release notes and known issues for Duplicate Detection and Resolution (DDR) and data sync/fingerprint matching. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

- 2020 WorldCat Matching release notes
- Known issues

**WorldCat Validation release notes and known issues**

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Find WorldCat Validation release notes and known issues. Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.

- 2020 WorldCat Validation release notes
- 2019 WorldCat Validation release notes
- 2018 WorldCat Validation release notes
- Known issues

**WorldShare Record Manager training**

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Find training on WorldShare Record Manager.

- Live classes
- Editing bibliographic data in WorldShare Record Manager
- Advanced editing of bibliographic data in WorldShare Record Manager
Policies for adding original records to WorldCat

- Policies for replacing WorldCat records
- Exercises
- Videos

**Troubleshooting**

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Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

- After I set a WorldCat holding in Record Manager, when can it be viewed in other applications?
- Authority pop-ups are not populating
- A Printbook displays as an Online record, how can I resolve this problem?
- A record is locked, who should I contact to unlock the record?
- Can I add a PDF document to a local record holding?
- Can I delete a WorldCat bibliographic record?
- Can Local Bibliographic Data be moved between records?
- Can we reuse item barcodes?
- Do actions in Connexion show up immediately in WorldShare Record Manager?
- How can I change the default Label type in Record Manager?
- How can I control NTA headings in WorldShare Record Manager?
- How can I request NACO authorization access for use in Record Manager?
- How can I see how many holdings we have by format in WorldCat?
- How do I activate Record Manager in WorldShare?
- How do I change the order in which different LHRs for an item display in WorldCat Discovery?
- How do I create a report that shows a Nonpublic Note and Item Status?
- How do I delete a record from WorldCat?
- How do I get textual holdings information to show in the Holdings Summary?
- How do I send a bibliographic record change request?
- How do we delete holdings for a closed library?
- How do we get our records into WorldCat?
- How to format six by six labels on one page in WMS Record Manager
- How to remove duplicate item barcodes safely
- How to resolve printer label creep?
- How to restore an item that was accidentally withdrawn
- If I start a record in Record Manager, can I finish editing it in Connexion browser or Connexion?
- Is it possible to create a local holdings record without setting holdings on a record?
- Is it possible to undo a bulk action?
Is it possible to undo a merge of inappropriately merged records?
◦ Is there a way to limit search results by year?
◦ I am creating a Catalogue for an Oral History sound recording but the Literary Text Code cannot be entered
◦ I am getting an error message when I try to edit a record in the bibliographic saved in-progress file
◦ I am getting an error message when I try to search for records in the bibliographic saved in-progress file
◦ I am getting an error message when trying to save a derived LHR.
◦ I cannot submit a Record Change Request. What should I do?
◦ I can't update a bibliographic record.
◦ I have had problems using the WorldCat Bibliographic and Authority Record Change Request form to report duplicate errors.
◦ I have run into mass validation errors working in the Record Work Lists in Record Manager, is there a way to bulk fix validation errors?
◦ I keep getting a Bib Read Failed Unexpectedly. How can I fix it?
◦ I need our authorization number for Sirsi Dynix's SMARTport. How do I get those credentials?
◦ I need the authorities roles added to my WorldShare account
◦ I would like to add a new name authority record to the LC authority file. How do I do that?
◦ Left hand navigation drop-downs overflow into the main display in Record Manager
◦ My Online record displays in WorldCat Discovery as Print. How can I resolve this problem?
◦ The Label Print List is showing two labels for each record
◦ The LHR display in Record Manager is not displaying the item's ILL lending status.
◦ The same record is displaying twice in WorldShare Record Manager
◦ We deleted LHRs. This action removed holdings from our collection even though we have holdings set on the titles in the Knowledge Base.
◦ We just created a new record for issues of a journal. When we try to edit the items a server error pops up.
◦ What are the OCLC cataloging rules for full-level records related to ELvl "M" and local data?
◦ What does the bulk LHR edit error "Not Updated - Missing Summary" mean?
◦ When editing the Item Details of a Local Holding Record I get an error in relation to not being able to find the specified holding item
◦ When I click on the print button to print my labels, nothing happens.
◦ When I create a new LHR using the Derive option, information that I do not want is brought over from the Bib
◦ When I try to edit a bib, I get an "unauthorized" message. Is there a reason I can't fix this record?
◦ Where is the control number in an LBD record?
◦ Why am I getting a validation error on the 040 tag?
◦ Why am I seeing the wrong Local holding code come up in the 049 tag in Record Manager?
◦ Why are duplicate records appearing in the Discover Items search?
◦ Why can't other users at my library see the label templates I created?
◦ Why can I not see the Customize Scripts tab in Record Manager?
Why does an item have a shelving location that does not exist on our Holding Codes & Translation Table?

- Why do I see a second copy prefix in my LHR display in Record Manager?
- Why is my Holding Code changing when I derive a record?
- Why is our holding code reading as invalid in the 852 $b field of an LHR?
- Why is there no shelf location and call number displaying for an item I hold?
- Why is the publication information not populating in my record when I switch from MARC 21 view to Text View?
- Will batch deleting a merged OCN that is now in the 019 tag delete my holding on the record that was kept
- Will my user preferences from Connexion Browser automatically carry over to Record Manager?