WorldShare® Record Manager simplified cataloging

Learning objectives
After completing this course, you should be able to use Record Manager simplified cataloging to find WorldCat records that match your items, set holdings and export records, download records from an export list, and optionally, add local data to records before exporting.

Documentation and additional training topics
Short videos are available on these topics:
- Search WorldCat
- Set user preferences
- Print labels
For complete documentation, see Simplified cataloging role.

Copy cataloging workflow
1. Search WorldCat to find a record matching your item.
2. Optional: Add local data such as call number and barcode.
3. Set Holding and Export.
4. Optional: Send to Label Print List.
5. Repeat for each item you are cataloging.
6. Send Export List to a file on your computer, or to your local system via TCP/IP, and/or print labels.

Create an export list
After you create an export list, you can add records to it so that you can download these records to your local catalog later.

- In the left navigation, click Record Manager > Export Lists.
- Click New List and enter a name.
- Optional: Select Make Default if you want the new list to be the default export list that appears at the top of the Export Lists list.
- Optional: Select My List if you want the list available only to your user name. When not selected, the list is shared institution-wide.
- Click Create.
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Match records to items

Focus on these fields:
- Title (245)
- Edition (250)
- Publisher (264 or 260)
- Physical description (300)

Also note:
- Language of cataloging (040 $b)
- Cataloging source (040 $a and $c)

If fields noted above match, usually prefer a record with:
- Encoding Level Full
- a national library symbol (see table below) in
  - Cataloging Source (Condensed Search Results)
  - OR Cataloging Agency (Text View of single record)
  - OR 040 $a (MARC View of single record)
- OR an Authentication Code such as pcc (in 042 field in MARC View)

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Library</th>
</tr>
</thead>
<tbody>
<tr>
<td>DLC</td>
<td>Library of Congress</td>
</tr>
<tr>
<td>PCC</td>
<td>Program for Cooperative Cataloging</td>
</tr>
<tr>
<td>GPO</td>
<td>Government Printing Office</td>
</tr>
<tr>
<td>NLM</td>
<td>National Library of Medicine</td>
</tr>
<tr>
<td>NAL</td>
<td>National Agricultural Library</td>
</tr>
<tr>
<td>NLC</td>
<td>Library &amp; Archives Canada</td>
</tr>
<tr>
<td>UKM</td>
<td>British Library</td>
</tr>
</tbody>
</table>

For detailed information, consult Bibliographic Formats and Standards chapter 4, When to Input a New Record, at http://www.oclc.org/bibformats/en/input.html. If a difference justifies a new record, the item is not a match.

Add local data (optional)

- You can add institution-specific data in the fields listed in the help for Add local data to copies of records prior to exporting them for your local catalog or printing labels. These fields are NOT added to the WorldCat record.
- From a bibliographic record, click Add Local Data.
- When you are finished adding data, click Set Holdings and Export if you have not already set a holding on the record.
- Or Select Send to if you have already set a holding on the record, and choose Export List, Label Print List, or Local System (via TCP/IP)
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Retrieving this record…

And adding this local data…
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Then **Set Holding and Export**…

Would result in a record in your local catalog something like this (for illustration purposes, only some fields are shown in this example).

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>Peppas, Lynn.</td>
</tr>
<tr>
<td>245</td>
<td>What are cirrus clouds? / ï© Lynn Peppas.</td>
</tr>
<tr>
<td>246</td>
<td>Cirrus clouds</td>
</tr>
<tr>
<td>300</td>
<td>24 pages : ï© color illustrations : ï© 22 cm.</td>
</tr>
<tr>
<td>541</td>
<td>h 10.59</td>
</tr>
<tr>
<td>590</td>
<td>Johnston Guided Reader Grant</td>
</tr>
<tr>
<td>852</td>
<td>ï© Main ï© Children's Dept. ï© h 551.576 ï© PEPPA ï© k J ï© p 978556423412 ï© t 1</td>
</tr>
</tbody>
</table>

**Set Holding and Export**

Whether or not you add local data, you should set holding and export for each record.

When you set a holding on a record, you are adding your library's OCLC institution symbol to a WorldCat bibliographic record and indicating that your library owns an item that is represented by the record. After setting a WorldCat holding, other WorldCat users can see that the item is in your collection.

The Export action allows you to add a copy of the WorldCat bibliographic record (with optional local data) to your local catalog.

**For each title you are cataloging**
- **Set Holding and Export**
- Select an export list and click **Add**
- **Optional**: Send to > Label Print List. Select a Label Print List Name and click **Send**.

**When you are ready to add exported records to your local catalog**
- Navigate to **Export Lists**
- Select the list you want to export
- From the **Export All** menu, select either
  - **Send to My Computer**
  - **OR Send to Local System (via TCP/IP)**
- After records have been added to your local catalog, delete records from the export list, or delete the list
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Delete holdings

When you remove items from your collection and remove the record from your local catalog, it is important to also delete your holdings from the WorldCat record.

- Find the record to which your holdings are attached. If available, search by OCLC number.
- Click WorldCat Holding > Delete. The Delete action is only available for records on which your holdings have been set.
Check your knowledge and skills

Sign in to simplified cataloging with your own user name and password. Answers are on the last page.

1. When you “Add Local Data” such as a call number, barcode, or notes, where can you save the data? Select all that apply.
   a. Label Print List, from which you can print spine and/or processing labels.
   b. the WorldCat record.
   c. copy of the record that you export to your local catalog

For the remaining questions, use this example:


2. Search for a record using any combination of author, title, publisher, date, and format. How many records do you find?

3. Search for a record using ISBN. How many records do you find?
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4. If you searched by ISBN and found these records, which one would you select?

<table>
<thead>
<tr>
<th>Title</th>
<th>Edition</th>
<th>Publisher</th>
<th>Publication Date</th>
<th>Cataloging Source</th>
<th>Authentication Code</th>
<th>Encoding Level</th>
</tr>
</thead>
</table>

5. Assuming that you have already created an Export List and a Label Print List, list the steps (in order) that you would do to print a spine label with a call number, set your holdings, and export a copy of the record with a call number and barcode in an 852 field.
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Answers

1. A and C. When you Add Local Data, then Set Holdings and Export, you can send this local data to a Label Print List, as well as an Export List. This data is not added to the WorldCat record.

2. Depending on the search terms you entered and any facets you applied to your search results, you might retrieve between 2 and approximately 31 records.


4. None of the records has a national library as the cataloging source, nor an authentication code. Although record 2 matches on publisher and publication date, it has Encoding Level “min” (minimal). Record 3 has a different publisher and publication date. Record 1 has an edition statement, publisher, and publication date matching the item, and it has Encoding Level Full, so it is the best record.

5. Follow these steps:
   a. Click **Add Local Data**.
   b. On the Add Local Data screen:
      i. Select a Call Number Type.
      ii. Enter data in Call Number Class and Item Number/Cutter. (This data will print on the spine label).
      iii. Enter call number data in Location > Classification Part and Location > Item Part/Cutter. (This data will be in the 852 field, subfields $h$ and $i$, of the exported record).
      iv. Enter barcode data in Location > Barcode/Piece Designation. (This data will be in the 852 field, subfield $p$, of the exported record).
   v. Click **Set Holdings and Export**. Select an Export List and click **Add**.
   vi. Click **Send to > Label Print List**. Select a Label Print List Name and click **Send**.