

# WorldShare® Record Manager

## Create a brief level record

### Search the WorldCat® bibliographic database

To place an order in Acquisitions, you must find a record in the WorldCat. Most of the time you can easily do this with a basic search. **Advanced Search** allows you to refine your search. Some of the most useful ways to do this are title, author, publisher, formats, language, and year(s). If you need to do an advanced or expert search, it may be helpful to consult *Searching WorldCat Indexes* at [https://help.oclc.org/Librarian\\_Toolbox/Searching\\_WorldCat\\_Indexes](https://help.oclc.org/Librarian_Toolbox/Searching_WorldCat_Indexes)

### Determine if you have found a matching record

These fields in the record you find should be appropriate for the item you are trying to order. If they are not, you should create a new WorldCat record.

245	Title
250	Edition (if present)
260	Publisher and Publication Date
300	Physical Description
490	Series Statement (if present)

Complete guidelines for when to input a new record (also useful for determining if you have found a matching record) are in *Bibliographic Formats and Standards*, chapter 4 at <http://www.oclc.org/bibformats/en/input.html>

### If there's no WorldCat record for item to be ordered

If you have thoroughly searched WorldCat and determined that none of the records found match the item you need to order, create a new WorldCat record. You have the option of creating a full-level (Encoding Level 1) record.

Most acquisitions staff will choose to create an Abbreviated Level record (Encoding Level 3). Create the record using WorldShare® Record Manager (on the Metadata tab). Brief guidelines are below

## If you don't see the Metadata tab

All WorldShare® Management Services (WMS) libraries have access to the Metadata tab. If you don't see it when you login, someone at your library will need to authorize it for your user name. They will do this by going to the **Admin** tab and retrieving your user record, and editing the **Cataloging Full** role to **Yes**.

## Abbreviated level record standards

### Encoding Level

The Encoding Level (Leader byte 17) identifies the degree of completeness of the bibliographic information and MARC tagging in the record. For more information, see *Bibliographic Formats and Standards* encoding level section at <http://www.oclc.org/bibformats/en/field/elvl.html>. Abbreviated level records have the value 3 in Encoding Level.

### Abbreviated Level cataloging guidelines

Guidelines for abbreviated level records are in *Bibliographic Formats and Standards*, section 2.3 at <http://www.oclc.org/bibformats/en/onlinecataloging.html#BCGGBAFC>. The table below is a version of the table in that section, customized for this training session.

#### “Mandatory” fields

Element	Tag	Input Standard	Note
Type of Record	LDR	M	
Bibliographic Level	LDR	M	
Encoding Level	LDR	M	Value <b>3</b>
Descriptive Cataloging form	LDR	M	For AACR2: value <b>a</b>
Type of Date	008	M	Usually value <b>s</b>
Date 1	008	M	If you don't know, guess (4-digit year)
Place of Publication	008	M	Select from list. If you don't know, guess.
Language	008	M	Select from list. If you don't know, guess.
Cataloging Source	008	M	Value <b>d</b>
Cataloging Source	040	SS	
Title	245 \$a	M	1 <sup>st</sup> indicator: value <b>0</b> if you are not entering information in 100 or 110; value <b>1</b> if you are entering information in 100 or 110. If in doubt, use value <b>1</b> . 2 <sup>nd</sup> indicator: non-filing characters, if title begins with initial article. For example, if title begins with <i>The</i> , 2 <sup>nd</sup> indicator should be value <b>4</b> .

Key: M=Mandatory; R=Required if applicable; SS=System-supplied

## “Required if applicable” fields

Element	Tag	Input Standard	Note
Date 2	008	R	
Form of Item	008	R	Usually value blank; but <b>d</b> for large print, <b>o</b> for online, <b>q</b> for direct electronic
LCCN	010	R	If known: Library of Congress Control Number
ISBN	020	R	If known: International Standard Book Number
Music Publisher Number	028	R	
Main Entry: Personal Name	100	R	1 <sup>st</sup> indicator: value 1 (in most cases) 2 <sup>nd</sup> indicator: always blank
Main Entry: Corporate name	110	R	1 <sup>st</sup> indicator: value 2 for direct order; value 1 for jurisdiction name. If in doubt, use value 2. 2 <sup>nd</sup> indicator: always blank.
Title: General Material Designation	245 \$h	R	If item is not a print book, enter <b>[videorecording]</b> , <b>[sound recording]</b> , etc.
Title: Subtitle	245 \$b	R	
Title: Statement of Responsibility	245 \$c	R	
Varying Form of Title	246	R	Enter if someone might search for this item by a title other than the one you entered in 245. Emphasize varying titles such as those containing symbols or numbers.
Edition	250	R	
Place of Publication	260 \$a	R	
Publisher	260 \$b	R	
Date of Publication	260 \$c	R	4-digit year. If you don't know, guess (should match date in 008: Date 1)
Physical Description: Extent	300 \$a	R	If known: number of pages, number of minutes on video, etc. If not known, use <b>1 volume</b> , <b>2 videodiscs</b> , etc.
Series Statement	490	R	Enter if item is part of a series. Use 1 <sup>st</sup> indicator value <b>0</b> .
Electronic Location and Access	856 \$u	R	Other subfields are optional.

Key: M=Mandatory; R=Required if applicable; SS=System-supplied

# Create a new WorldCat record

After you have thoroughly searched WorldCat and determined no record matches the item you need to order, do the following to create a new record and add it to WorldCat.

- Click **Metadata > Record Manager**
- Click **Create WorldCat Record**
- Select **MARC 21 View**
- Select **AACR2**
- Select the appropriate material type template
- Click **Create**
- Enter data in the “mandatory” and “required if applicable” fields
- As necessary:
  - Apply previously created constant data (**Record > Bibliographic Constant Data > Apply**)
  - Apply previously created field strings (**Edit > Field > Insert Field String**)
  - Apply previously created text strings (**Edit > Field > Insert Text String**)
  - 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 new browser window.
    - Guided entry fields (such as 008): Click ▶ to expand field. Click ? next to element name (such as Form of Item). *Bibliographic Formats and Standards* for that element opens in new browser window.
  - Edit guided-entry fields:
    - In LDR (Leader) or 008 field, click ▶ to expand field
    - Use drop-down menus to select appropriate value for each element
    - When finished, click **Done**
  - Subfield delimiter: Use **\$**
  - Validate the record. 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 Add New Record
    - To manually invoke validation, from the **Record** menu, select **Validate**
    - Validation error messages display below the field with an error
    - If record passes validation, “Validation of record successful” displays at top of record
- To save the record for review by someone else at your library: click **Save > Save In-Progress Record**
- To add the record to WorldCat: click **Save > Add Record to WorldCat**

- After adding the record to WorldCat: In Acquisitions, search for the record by OCLC Number, and order as usual
  - You may want to add a note indicating that the item should be sent to cataloging when received.
  - When receiving items, a pencil icon in the Notes column alerts you to the presence of a note.
  - In addition, the note will display in a pop-up window if Show on receiving has been selected when ordering.

## Constant data, field strings and text strings

### Constant data

- Create bibliographic constant data records so that you can:
  - Avoid rekeying frequently used information when you create or maintain bibliographic records.
  - Reduce typing errors and improve consistency among related bib records
  - Add specific fields, subfields or other elements to multiple bib records.
  - Develop and maintain standards for use in all bib records, for certain collections, or for specific types of resources.
- Include multiple fields (fixed field elements and/or variable fields)

### Set preferences for new constant data

Set defaults for which fields appear in new bibliographic constant data records.

- Click on **Preferences** on left navigation panel.
- Click on **Working with Records** tab and scroll down to **Fields for new Constant data records**.
- Select fields. Click **Save**.

### Create new constant data

- Go to **Toolbox on left navigation panel**
- Click **Constant data tab** and select the **bibliographic** radio button
- Click **New**
- Select **AACR2** or **RDA** and **Material type template** and then click **Create**
- Add fixed fields (LDR, 008) and variable fields ( including tags, indicators and subfields)
- Select **Record** dropdown and then **Reformat**.

- Click **Save**. The Save Constant Data dialog box opens. Fill in the fields for **Name**, **My Status**, and click checkbox **Make Default** (if you want this to be your default cd record).
- Click **Save**

## Apply constant data

- From an existing bibliographic record (or from a workform if you're creating a new record) go to the **Record** menu select **Bibliographic Constant Data > Apply**
- Select constant data from the list (default will be at the top with a green check)
- Select:
  - LDR and 008 values
  - Only variable fields (default)
  - LDR and 008 and variable fields
  - Click **Apply**.

## Field strings

When you are editing a bibliographic record or local bibliographic data, you can save frequently used variable field information as a string that can be copied to other fields. The whole field is saved including tags, indicators, subfields.

### Save a field string

- Right click in the field and select **Save Field String** from the **Field** submenu.
- In the **Add Field String** window enter a **Name** for the field string and **Save**

### View, edit and delete field string

- Go to **Toolbox** on left navigation panel
- Click the **Strings** tab
- Select Field radio button to view, edit and delete field strings.

### Insert a field string

- Open a bib record, create new blank field
- Right-click the field, then select **Insert Field String** from the **Field** submenu. The Insert Field String window opens.
- In **Field String Search**, enter the name of the field string that you want to insert. As you type, the system automatically suggests names of potential matches of field strings.
- Select the name of the field string when it appears. The field string information is then inserted into the variable field.

## Text strings

When you are editing a bibliographic record or local bibliographic data, you can save frequently used variable field information as a string that can be copied to other fields. Text strings cannot include tags, indicators, but can include delimiter and subfield code)

### Save a text string

- Open a bib record and select the text you want to save.
- Right-click, then select **Save Text String** from the **Field** submenu. The **Add Text String** window opens.
- Enter the name of the text string in the **Text String Name** field
- Click **Save**

### View, edit and delete text string

- Go to **Toolbox** on left navigation panel
- Click the **Strings** tab
- Select the **Text** radio button to view, edit and delete text strings.

### Insert a text string

- Open a bib record and select the field where you want to insert the text string
- Place the cursor at the position in the field where you want to insert a text string
- Right-click, then select **Insert Text String** from the **Field** submenu.
- In the **Text String Search**, enter the name of the text string that you want to insert. As you type, the system automatically suggests names of potential matches of text strings. .
- Select the name of the text string when it appears. The text string information is then inserted into the variable field.