WorldShare® Record Manager

Create and replace WorldCat bibliographic records

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Learning objectives

• Create new WorldCat bibliographic record
• Use Advanced Actions for editing
• Upgrade WorldCat bibliographic records
• Replace WorldCat records
Create a new WorldCat bibliographic record

- **Search** WorldCat to avoid adding a duplicate record
- If in doubt whether you’ve found a matching record, refer to Bibliographic Formats and Standards, Ch. 4 When to Input a New Record

https://www.oclc.org/bibformats/en/input.html#generalguidelines

Create new WorldCat bibliographic record

- If no matching record exists in WorldCat, create a new record according to current cataloging practices, e.g., *Resource Description & Access* (RDA).
- Need **Cataloging / Metadata subscription** and **Cataloging Full** or **Cataloging Admin** role in Record Manager
- Refer to Bibliographic Formats and Standards Ch. 2 Online Cataloging

Encoding Level

- OCLC Cataloging libraries: use MARC21 codes:
  - Full: blank
  - Minimal: 7
  - Abbreviated (brief): 3

- Previously, OCLC Cataloging participating libraries could only enter records with
  I – Full level,  K – Minimal level, 3 – Abbreviated level
- For Full and Minimal record requirements see Library of Congress MARC 21 for
  Bibliographic Data, National Level Full & Minimal Requirements.

Input Standards Example (BFS)

246 Varying Form of Title (R)

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Full / Minimal</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIB</td>
<td></td>
</tr>
</tbody>
</table>

Input Standards
- Required if applicable/Optional

1st Indicator
- 0 Note, no added entry
- 1 Note, added entry
- 2 No note, no added entry
- 3 No note, added entry

2nd Indicator
- Type of title

Subfields
- (R=Repeatable NR=Nonrepeatable)
  - 4a Title proper/short title (NR)
  - 1b Remainder of title (NR)
  - 1f Date or sequential designation (NR)
  - 3g Miscellaneous information (R)
  - 4h Medium (NR)

Input Standards
- Mandatory/Mandatory
- Optional/Optional
- Optional/Optional
- Do not use/Do not use
Create new WorldCat bibliographic record

• **Create** new record from a workform
  – MARC21
    • AACR2
    • RDA

• **Derive** new MARC record from existing MARC record

Set WorldCat Holding

Non-WMS libraries

- Set WorldCat Holding
- Add Record to WorldCat
- Replace WorldCat Record
- Save and Lock WorldCat Record
- Save In-Progress Record

Set Holding Audience Level

WMS libraries

- Set Holding Audience Level
- Add Record to WorldCat
- Add Record and Set Holding Audience Level
- Replace Bibliographic Record
- Save and Lock Bibliographic Record
- Save In-Progress Record
- Set Holding Audience Level and Export
Create new WorldCat bibliographic record

- After creating the new record, select
  - Add Record to WorldCat
  - Add Record and Set WorldCat Holding or Add Record and Set Holding Audience Level (WMS)
- **OCLC number** assigned and displays in field 001
- Your **OCLC symbol** in 040 ‡a and ‡c
- Search 040 ‡c for original records using cs= <OCLC symbol>

Advanced actions

- Derive electronic record
- Create 830
- Enhance 505
- Generate 043
- Move 508/511 Names to 700
Replace

• Saves changes to the WorldCat record
• 040 $d <your OCLC symbol> added
• Need Cataloging / Metadata subscription and Cataloging Full or Cataloging Admin role in Record Manager

When to use Replace

• When you edit a WorldCat record
  • Corrections (e.g., fixing typos, incorrect coding, etc.)
  • Enrichments (e.g., adding subject headings, formatted contents notes, etc.)
  • Upgrade encoding level
  • Control headings

• And the changes are not just for local use, but appropriate for the WorldCat record
Guidelines for Replace

• Guidelines for experts
  https://help.oclc.org/WorldCat/Metadata_Quality/Expert_community/Guidelines_for_experts

• Bibliographic Formats and Standards, Chapter 5

• See also:
  • AskQC https://help.oclc.org/WorldCat/Metadata_Quality/AskQC

Best practices for Replace

• First, do no harm
  – NEVER remove correct and accurate information
  – NEVER change the basic nature of a WorldCat record
  – AVOID including local data
  – Be cautious about changing records with a different language of cataloging (identified in field 040 subfield ‡b)

• If in doubt, DON’T
  – Consider intent of inputting library – cataloger’s judgement
  – Consider data in context of whole record
  – Behave responsibly – Replace adds 040 $d <your OCLC symbol>
Guidelines for Replace

With **Full-level cataloging authorization** or higher, can make additions and changes to almost all fields in almost all records.

- **PCC records**—both BIBCO and CONSER records—are **EXCLUDED**.
  *(identified by 042 codes: isds/c, lc, lcd, msc, nlc, nsdp, nst, pcc)*
- **LC** records that are NOT coded as PCC records are **INCLUDED**.
- **CIP** records (Elvl 8) that are coded as PCC can be changed, but the Elvl must remain at 8; those not coded as PCC can be upgraded.
- Can not edit system-supplied data (e.g., 040, 019, 029, 042, 066, 850, 938)

See also: BFAS Chapter 5.2.2

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Edit / Replace capabilities for **non-PCC records**

**Upgrade to a higher Encoding Level (ELvl)**

- OCLC Cataloging libraries: use MARC21 codes:
  - **Full**: blank
  - **Minimal**: 7
  - **Abbreviated (brief)**: 3
Edit / Replace capabilities for Non-PCC records

Upgrade minimal-level records to full-level records or upgrade abbreviated records to minimal-level or full-level records.

<table>
<thead>
<tr>
<th>Encoding Level</th>
<th>Definition</th>
<th>Action</th>
<th>Edit Encoding Level to</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Full level input by OCLC participants</td>
<td>Edit as needed</td>
<td>blank</td>
</tr>
<tr>
<td>J</td>
<td>Deleted record</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>K</td>
<td>Minimal level input by OCLC participants</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>M</td>
<td>Added from a batch process</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>blank</td>
<td>Full level</td>
<td>Edit as needed</td>
<td>blank</td>
</tr>
<tr>
<td>1</td>
<td>Full level, material not examined</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>2</td>
<td>Less-than-full level, material not examined</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>3</td>
<td>Abbreviated level</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>4</td>
<td>Core level</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>5</td>
<td>Partial (preliminary) level</td>
<td>Upgrade to minimal level or full level</td>
<td>7 or blank</td>
</tr>
<tr>
<td>7</td>
<td>Minimal level</td>
<td>Upgrade to full level</td>
<td>blank</td>
</tr>
<tr>
<td>8</td>
<td>Pre-publication / CIP records</td>
<td>Can not upgrade / change ELvl if PCC</td>
<td>N/A</td>
</tr>
</tbody>
</table>

4 with 042 pcc is already Full.

Edit / Replace capabilities for PCC records

- **Database Enrichment** – add or edit specific fields in full level records
- You can add or edit specific fields in **PCC BIBCO records**, if the fields qualify as **Database Enrichment**.
- **PCC CONSER records are excluded**

See **Database Enrichment table BFS 5.2.3**
Reporting errors you can’t fix yourself

- Send e-mail to: bibchange@oclc.org
- Use the Web form: http://www.oclc.org/content/forms/worldwide/en/record-quality.html
- Proof may be required for some changes
  
  See: Bibliographic Formats and Standards section 5.5
  https://www.oclc.org/bibformats/en/quality.html#requestingchangestorecords

Training and documentation

https://help.oclc.org
Thank You!

Please remember to fill out the evaluation for this class

- Instructor: Mary Alice Robinson
- Category: Cataloging and Metadata
- Class name: Create and Replace WorldCat records
  https://www.surveymonkey.com/r/OCLCOnlineILTEvaluation

Training questions? Contact OCLC Training training@oclc.org/