

# Advanced editing of bibliographic data in WorldShare® Record Manager Class handout

## User preferences

### Working with records

Click **User Preferences** in the left navigation, then click **Working with Records** and select **Bibliographic Records**

- Fields for New Constant Data Records
- Controlled Headings
- RDA Toolkit Login

The screenshot displays the 'User Preferences' interface in WorldShare Record Manager. On the left is a navigation sidebar with 'Record Manager' expanded, showing options like Search, Create Record, Record Work Lists, Export Lists, Toolbox, and 'User Preferences' (highlighted with a red box). The main content area is titled 'User Preferences' and includes a 'Save' button and a 'Discard Page Changes' button. A navigation tree on the left of the main area shows 'Working with Records' expanded to 'Bibliographic Records'. The 'Bibliographic Records - Working with Records Preferences' section contains several settings: 'Default Editor' (MARC 21 View selected), 'Default Record Format' (AACR2 selected), 'Default Holding Library Code (049)' (Main Branch (MAIN)), 'Default Classification Scheme' (Library Of Congress), and 'Default Cutter Type' (Four-Figure selected). There is also a 'Fields for New Constant Data Records' section with a 'View Fields' link, and a 'Controlled Headings' section with checkboxes for 'Add equivalent subject headings', 'Canadiana Names', and 'Library of Congress Names'. At the bottom, the 'RDA Toolkit Login' section has input fields for 'Account ID' (OCLCLibrary) and 'Password' (masked with asterisks).

## Search preferences for authority records

Click **User Preferences** in the left navigation, then click **Searching – Basic** and select **Authority Records**

The screenshot shows the 'User Preferences' page for Authority Records. The left sidebar has 'User Preferences' highlighted in a red box. The main content area shows 'Authority Records Basic Search Preferences' with options for 'One Search Result Only', 'Diacritics', and 'Authority References'. At the bottom, there is a table for 'Search Scope(s) for Authority Records'.

	Display	Search Scope Name	Default
↓	<input checked="" type="checkbox"/>	LC	<input checked="" type="radio"/>
↑	<input checked="" type="checkbox"/>	LC - Browse	<input type="radio"/>
↑	<input checked="" type="checkbox"/>	LC - Root/Expanded Browse	<input type="radio"/>

## Methods to create original records

### Derive record

Use Derive to copy data from an existing WorldCat record to a new record (for example, for a different edition or a different physical format).

- Retrieve an existing WorldCat record
- From a list of records, click **Derive**, OR in a full record, from the **Record** menu, click **Derive Bibliographic Record** and then click **Derive, Derive with Default Constant Data or Derive and Preview Constant Data**
- If needed, from the **Record** menu, click **Change Material Type**
- Edit the record as appropriate
- To add the new record to WorldCat, from the **Save** menu, click **Add Record to WorldCat** OR
- To add the new record to WorldCat and set your holdings, from the **Save** menu, click **Add Record and Set WorldCat Holding**
- To save the record to your institution's online save file, from the **Save** menu, click **Save In-Progress Record**

## Create New Record

Use Create New Record to create a record from a blank form.

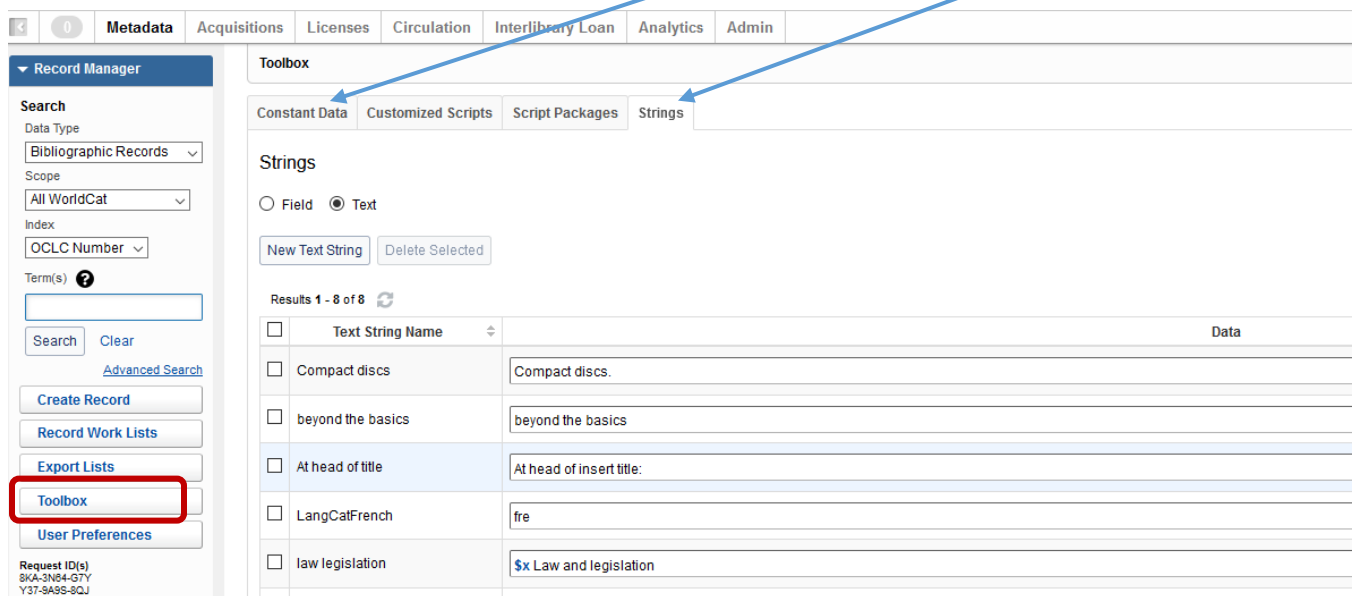
- From the left navigation bar, select **Create Record**
  - Select Type: **MARC21 View** or **Text View**
  - Select Format: **AACR2** or **RDA**
  - Select Material Type Template: **Book, etc.**
  - Optionally, apply **constant data**
  - Click **Create**
- Enter information and edit the record as appropriate
- To add the new record to WorldCat, from the **Save** menu, click **Add Record to WorldCat**  
*OR*
- To add the new record to WorldCat and set your holdings, from the **Save** menu, click **Add Record and Set WorldCat Holding**

## Constant data, field strings and text strings

Save frequently used fields and text to apply to new or existing bibliographic records

- **Constant data** – multiple fields (can include fixed field elements and/or variable fields)
- **Field string** – single field (includes tags, indicators, and subfields)
- **Text string** – text (e.g. a phrase to be inserted into a field)

To **view, edit** or **delete**, click **Toolbox**, and then select the **Constant Data** tab or the **Strings** tab (field and text):



The screenshot shows the OCLC Record Manager interface. The top navigation bar includes tabs for Metadata, Acquisitions, Licenses, Circulation, Interlibrary Loan, Analytics, and Admin. The left sidebar contains a Record Manager section with search filters and a red box around the 'Toolbox' button. The main area displays the 'Toolbox' section with tabs for Constant Data, Customized Scripts, Script Packages, and Strings. The 'Strings' tab is active, showing a list of text strings with columns for 'Text String Name' and 'Data'. The list includes items like 'Compact discs', 'beyond the basics', 'At head of title', 'LangCatFrench', and 'law legislation'. Two blue arrows point from the 'Toolbox' button in the sidebar to the 'Constant Data' and 'Strings' tabs in the main area.

Text String Name	Data
Compact discs	Compact discs.
beyond the basics	beyond the basics
At head of title	At head of insert title:
LangCatFrench	fre
law legislation	\$x Law and legislation

You can **create** new **field strings, text strings** and **constant data** from the **Toolbox** tabs by clicking **New**.

You can also create **field strings** and **text strings** while viewing a bibliographic record.

To create a **field string while viewing a bibliographic record:**

- click in the field and either **right click > Field > Save field string**
- OR select the **Edit menu > Field > Save field string.**

To create a **text string while viewing a bibliographic record:**

- highlight the text and either **right click > Field > Save Text string**
- OR select the **Edit menu > Field > Save Text string.**

## Local bibliographic data (LBD)

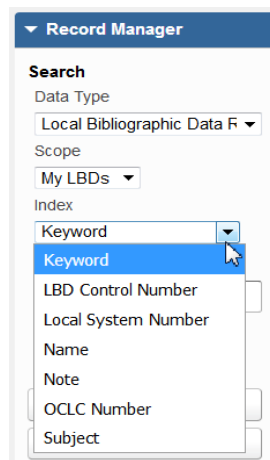
**Purpose of LBD:**

- To add local data that is not appropriate for the WordCat record (for example, information that only applies to a specific copy or specific library)
- LBD displays only in your library's WorldCat Discovery
- Must be enabled in Service Config
- **Documentation: *Working with Local Bibliographic Data at*** [https://help.oclc.org/Metadata\\_Services/WorldShare\\_Record\\_Manager/LBD](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/LBD)  
Explains LBD and what fields you can use, where these fields are indexed and how you can search for LBD fields in Discovery.

**Local Bibliographic Data (LBD) Indexing:**

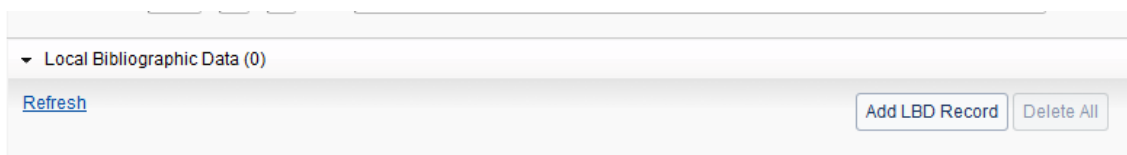
You can now limit the scope of your search to Local Bibliographic Data (LBD) records. The indexes are:

- Keyword (LBD)
- LBD Control Number (LBD)
- Local System Number (LBD)
- Name (LBD)
- Note (LBD)
- OCLC Number (WorldCat record)
- Subject (LBD)



**To add LBD:**

- Click on **Add LBD** to add a new LBD record.



## To view, edit or delete LBD:

- Scroll to the bottom of the bibliographic record in Record Manager.

Local Bibliographic Data (1)

[Refresh](#) Add LBD Record Delete All

(System.Supplied@2017-04-04,09:35:20) Local Bibliographic Data

Validate Reformat Delete

LSN		System.Supplied@2017-04-04,09:35:20	+ -
OWN		TS259	+ -
LDR		c	+ -
001		610808576	+ -
005		20170426120606.3	+ -
004		1	+ -
500	<input type="checkbox"/>	Virginia Hunter was an "Ourtown pioneer."	+ -
650	<input type="checkbox"/>	Local subject for my library.	+ -

Done

## Control headings

- Control headings links headings in bibliographic records to matching Library of Congress, MeSH (Medical Subject Headings) or Canadiana authority records, if available.
- Clicking a controlled heading hyperlink in a bibliographic record opens the authority record in a separate window.
- Once you control a heading (and add or replace the record in WorldCat), the heading in the bibliographic record is automatically updated whenever the linked authority record changes
- To control all controllable headings, from the **Record** menu, click **Control All Headings**.
- To control a single heading (for example, for an unqualified personal name): right-click in the field, then click **Controlled Heading > Add**.
- Auto-Suggest LC Names: When you begin typing a personal, corporate, or conference name in a 1XX or 7XX field, Record Manager suggests a list of potential matches. If the name you select is associated with a single authority record, the heading is automatically controlled. By default, Auto-Suggest is enabled. To turn off this feature, click **User Preferences** in the left navigation panel. In **Bibliographic Records** tab of the **Working with Records** panel, scroll to the **Controlled Headings** section and uncheck *Auto suggest LC names*.
- To edit a controlled heading (for example, to add a subdivision): right-click in the field, then click **Controlled Heading > Remove**. Edit the heading, then right-click in the field, and click **Controlled Heading > Add**.

# Search or browse for Library of Congress authority records

## To search the Library of Congress (LC) Authority File:

- Select **Authority Data**
- Select **Scope – LC** to search the LC file
- Select **Index** to search
  - Keyword
  - Corporate/Conference Name
  - Geographic Name
  - LCCN
  - Personal Name
  - Title
  - Topical
- Enter search terms and click **Search**

## To browse the Library of Congress (LC) Authority File:

- Select **Authority Data**
- Select **Scope – LC Browse** to browse the LC file
- Select **Index** to browse
  - Corporate/Conference Name Phrase
  - Genre Phrase
  - Geographic Phrase
  - Personal Name Phrase
  - Subdivision Phrase
  - Subject Phrase
  - Title Phrase
- Enter browse terms and click **Search**

The **LC – Root/Expanded Browse** feature is especially useful for name-title headings, and subject headings with subdivision(s).

- Select **Authority Data**
- Select **Scope – LC Root/Expanded Browse** to browse the LC file
- Select **Index** to browse
  - Corporate/Conference Name
  - Genre
  - Geographic
  - Personal Name
  - Subdivision Heading
  - Topical
  - Title

- Enter terms
- Enter the **Expanded Term(s)**
- Click **Search**

Consult the **full list of Library of Congress indexes and indexed fields:**

[https://help.oclc.org/Metadata\\_Services/Authority\\_records/Authorities\\_Format\\_and\\_indexes/Indexes\\_and\\_indexed\\_fields/50Library\\_of\\_Congress\\_indexes\\_and\\_indexed\\_fields](https://help.oclc.org/Metadata_Services/Authority_records/Authorities_Format_and_indexes/Indexes_and_indexed_fields/50Library_of_Congress_indexes_and_indexed_fields)

## Keyboard shortcuts

You can now use keyboard shortcuts to perform actions within a record. Previously, you performed keyboard shortcuts by opening a keyboard shortcut dialogue and making selections. New keyboard shortcuts are available for the following actions in select editors:

- Add Field Row (CNTRL+SHIFT+A)
- Copy Field Row (CNTRL+SHIFT+C)
- Go to Next MARC Record (CNTRL+SHIFT+8)
- Go to Previous MARC Record (CNTRL+SHIFT+7)
- Move Row Down (CNTRL+SHIFT+M)
- Move Row Up (CNTRL+SHIFT+U)
- Move LHR to Different WorldCat Record (CNTRL+SHIFT+2)
- Paste Field Row (CNTRL+SHIFT+G)
- Remove Controlled Heading (CNTRL+SHIFT+B)
- Send to Export List (CNTRL+SHIFT+6)
- Send to Label List (CNTRL+SHIFT+5)
- Send to Local System (via TCP/IP) (CNTRL+SHIFT+4)