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 interface.

Copy cataloging workflow

1. Search WorldCat to find a record matching your item.
2. *Optional*: Add local data such as call number and barcode (simplified cataloging role only)
3. **Set Holding and Export**.
4. *Optional*: **Send to Label Print List** (simplified cataloging role only)
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 (simplified cataloging role only)
7. *Optional*: Print labels (simplified cataloging role only).

Create an export list (simplified cataloging role only)

After you create an export list, you can add records to it so that you can download these records to your local catalog later.
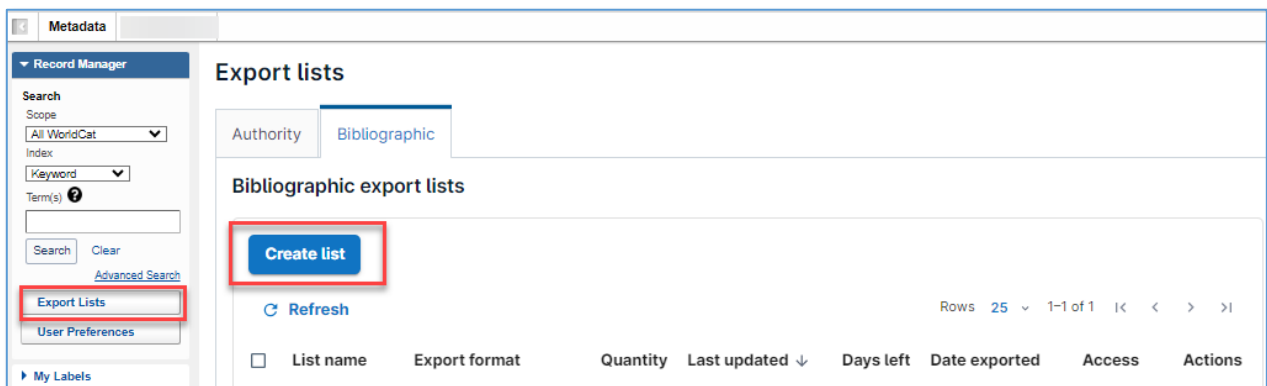
- In the left navigation, click **Record Manager** > **Export lists**.
- Click **Create List** and enter a name.
- *Optional*: Select **Set as default list** if you want the new list to be the default export list that appears at the top of the Export Lists list.
- *Optional*: Select **Set as "My List"** 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)

Symbol	Library
DLC	Library of Congress
PCC	Program for Cooperative Cataloging
GPO	Government Printing Office
NLM	National Library of Medicine
NAL	National Agricultural Library
NLC	Library & Archives Canada
UKM	British Library

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) (simplified cataloging role only)

- 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…

OCLC Number: 783520756	**WorldCat Holdings**
Print book	My Library: Held
	Other Libraries: 125

OCLC Number:	783520756
LCCN:	2012008270
Title:	What are cirrus clouds?
Alternate Title:	Cirrus clouds
Author:	Lynn. Peppas
Publisher:	New York, N.Y. : Crabtree Pub., ©2012.
Publication Date:	©2012
Physical Description:	24 pages : color illustrations ; 22 cm.

And adding this local data…

Add Local Data to 783520756

Send to ▾   Set Holdings and Export   Clear Fields

MAIN		$
OCLC Holding Library Code		Purchase Price

Call Number Type

Dewey (092) ▾		
Call Number Type	Call Number Class	Item Number/Cutter

Location

	Main	Children's Dept.	⊕ ⊖
Location	Sub-location	Shelving Location	
551.576	PEPPA		
Classification Part	Item Part/Cutter	Shelving Control Number	
J	978556423412	1	
Call Number Prefix	Barcode/Piece Designation	Copy Number	

Public Note

Notes

Local ▾	Johnston Guided Reader Grant	⊕ ⊖
Notes	Local Note	

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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).

100	1		Peppas, Lynn.
245	1	0	What are cirrus clouds? / ‡c Lynn Peppas.
246	3	0	Cirrus clouds
260			New York, N.Y. : ‡b Crabtree Pub., ‡c 2012.
300			24 pages : ‡b color illustrations ; ‡c 22 cm.
541			‡h 10.59
590			Johnston Guided Reader Grant
852			‡b Main ‡c Children's Dept. ‡h 551.576 ‡i PEPPA ‡k J ‡p 978556423412 ‡t 1

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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**. (simplified cataloging role only).

When you are ready to add exported records to your local catalog (simplified cataloging role only)

- 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

Delete holdings (simplified cataloging role only)

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.
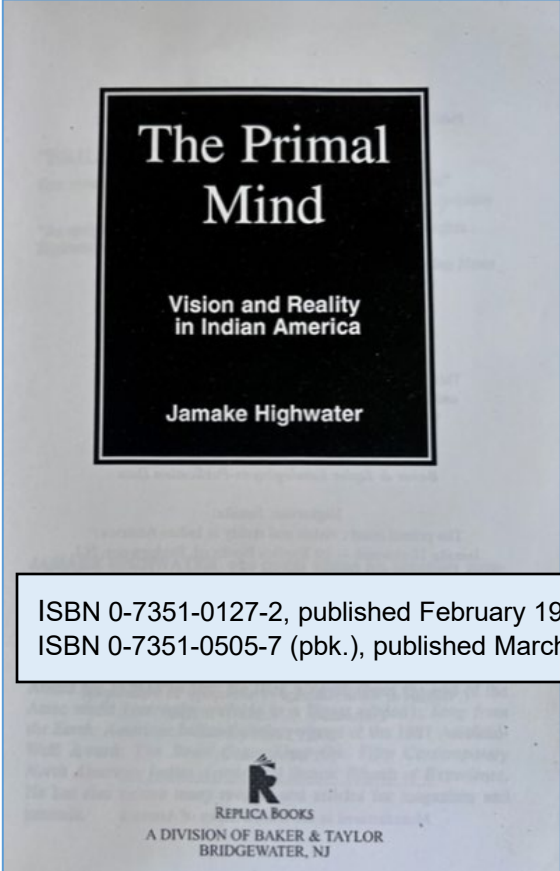
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Check your knowledge and skills

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

1. (applicable to simplified cataloging role only) 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:

ISBN 0-7351-0127-2, published February 1999
ISBN 0-7351-0505-7 (pbk.), published March 2001

REPLICA BOOKS EDITION

Published by Replica Books, a division of Baker & Taylor, 1120 Route 22 East, Bridgewater, NJ 08807

Replica Books is a trademark of Baker & Taylor

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All rights reserved under International and Pan-American Copyright Conventions. Published in the United States by Replica Books, a division of Baker & Taylor, Bridgewater, NJ

Biographical Note

This Replica books edition, first published in 1999, is an unabridged republication of the work first published by Meridian, The Penguin Group, New York in 1982

Baker & Taylor Cataloging-in-Publication Data

Highwater, Jamake.
The primal mind : vision and reality in Indian America / Jamake Highwater. -- 1st Replica Books ed. Bridgewater, N.J.
p. cm.
ISBN 0-7351-0127-2, published February, 1999
ISBN 0-7351-0505-7 (pbk.), published March, 2001
Originally published: New York : Harper, 1981.
Reprinted from the 1982 ed. published by Meridian
Includes bibliographical references and index.
1. Indians of North America - Philosophy. 2. Philosophy, Comarative. 3. Reality. I. Title.
E98.P5 H53 1999
191'.08997--dc 21

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?

	Title	Edition	Publisher	Publication Date	Cataloging Source	Authentication Code	Encoding Level
1	The primal mind : vision and reality in Indian America	Replica Books ed.	Bridgewater, NJ : Replica Books, 1999, ©1981.	1999, ©1981	DMM, DMM		Full
2	The primal mind : vision and reality in Indian America		New York : Replica Books, 1999, ©1981.	1999, ©1981	CNUTO, CNUTO		Min
3	The primal mind : vision and reality in Indian America		New York : Penguin 1982, ©1981.	1982, ©1981	HGP, HGP		Min

5. Assuming that you have the simplified cataloging role and 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.

3. If you searched by ISBN 0735101272, you probably retrieved 2 records. If you searched by ISBN 0735105057, you probably retrieved 3 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**.