

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



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## 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**

<https://www.oclc.org/bibformats/en/onlinecataloging.html>

# 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*
  - 1 – Full level, 7 – 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)

Full / Minimal

### Record Type

BIB

### Input Standards

Required if applicable/Optional

#### 1st Indicator Note/added entry controller

- 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

- # No type specified

### Subfields (R=Repeatable NR=Nonrepeatable)

- #a Title proper/short title (NR)
- #b Remainder of title (NR)
- #f Date or sequential designation (NR)
- #g Miscellaneous information (R)
- #h Medium (NR)

### Input Standards

- Mandatory/Mandatory
- Optional/Optional
- Optional/Optional
- Optional/Optional
- Do **not** use/Do **not** use

## Create new WorldCat bibliographic record

- **Create** new record from a workflow
  - MARC21
    - AACR2
    - RDA
- **Derive** new MARC record from existing MARC record

### Set WorldCat Holding

#### Non-WMS libraries

Record ▾ Advanced Action Save ▾ Set Holding and Export

Set WorldCat Holding

Delete WorldCat Holding

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Save ▾ ⚙

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

### Set Holding Audience Level

#### WMS libraries

Record ▾ Advanced Action Save ▾ Set Holding Audience Level and Export

Set Holding Audience Level to ▾

Delete WorldCat Holding

Derive Bibliographic Record ▾ Level: Not Held

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Save ▾ Set Holding Audience Level and Export

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

## 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>**

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## Advanced actions

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

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## 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](https://help.oclc.org/WorldCat/Metadata_Quality/Expert_community/Guidelines_for_experts)
- **Bibliographic Formats and Standards, Chapter 5**  
<https://www.oclc.org/bibformats/en/quality.html>
- See also:
  - **AskQC** [https://help.oclc.org/WorldCat/Metadata\\_Quality/AskQC](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC)



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## 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>



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## 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**



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## 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**.

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

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](mailto: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>

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## Training and documentation

<https://help.oclc.org>



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Librarians' Toolbox



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## Questions?

<https://help.oclc.org>

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**Welcome to OCLC Support**  
How can we help you?

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Select a category

- Discovery and Reference
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**OCLC support regions**

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<https://oclc.org/support>

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## 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/OCLCOnlineLTEvaluation>

Training questions? Contact OCLC Training [training@oclc.org/](mailto:training@oclc.org)

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