Discover how to set data type for the Create Record dialog and set preferences for working with bibliographic, authority, and local holdings records in WorldShare Record Manager.

Overview

Note: The settings in the Working with Records accordion are set by an individual at your institution.

This accordion allows you to set preferences for record editor, holding library code, classification scheme, cutter type, and more.

1. In the left navigation, click User Preferences.
2. From the User Preferences screen, click Working with Records.

Note: After setting preferences for bibliographic, authority, or local holdings records:
• Click **Reset Form** to restore original default settings.
• Click **Discard Page Changes** to discard the changes you made and retain your previous settings. A confirmation dialog displays to confirm the discardment. Click **Discard** to confirm and discard your changes.

**Working with Records accordion - Image**

- **Default Data Type for Create Record Dialog**
  - Authority Record
  - Bibliographic Record

- **Authority Records**
- **Bibliographic Records**
- **LHRs**

**Bibliographic Records - Working with Records Preferences**

- **Default Editor**
  - MARC 21 View
  - Text View

- **Default Record Format**
  - AACR2
  - RDA

- **Default Holding Library Code (049)**
  - OCLC Library East Branch (EAST)

- **Default Classification Scheme**
  - Library Of Congress

- **Default Cutter Type (092)**
  - Four-Figure
  - Sanborn

- **Fields for New Constant Data Records**
  - Specify which fields you want to appear in new bibliographic constant data records.

  - **View Fields**

- **Controlled Headings**
  - Automatically suggest authority headings for:
    - Canadiana Names
    - Library of Congress Names

- **RDA Toolkit Login**
  - These credentials are used to access the RDA Toolkit online help for fields.
    - **Account ID**
    - **Password**
Set data type for Create Record dialog

1. For Default Data Type for Create Record Dialog, select the default data type for new records.
   - Authority Record
   - Bibliographic Record (default)
2. Click Save.
**Set preferences for bibliographic records (default)**

**Working with records: Bibliographic Records tab - Image**

<table>
<thead>
<tr>
<th>Authority Records</th>
<th>Bibliographic Records</th>
<th>LHRs</th>
</tr>
</thead>
</table>

### Bibliographic Records - Working with Records Preferences

- **Default Editor**
  - **MARC 21 View**
  - **Text View**

- **Default Record Format**
  - **AACR2**
  - **RDA**

- **Default Holding Library Code (049)**
  - [OCLC Library East Branch (EAST)](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Record_Manager_user_preferences/Workin...)

- **Default Classification Scheme**
  - [Library Of Congress](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Record_Manager_user_preferences/Workin...)

- **Default Cutter Type (092)**
  - **Four-Figure**
  - **Sanborn**

- **Fields for New Constant Data Records**
  - When performing a derive action, specify which fields you want copied to a new constant data record from an existing bibliographic record or bibliographic constant data record.

  - **View Fields**

### Controlled Headings

- **When Controlling All Headings**
  - [Add equivalent subject headings](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Record_Manager_user_preferences/Workin...)

- **Automatically Suggest Authority Headings**
  - [Canadiana Names](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Record_Manager_user_preferences/Workin...)
  - [Library of Congress Names](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Record_Manager_user_preferences/Workin...)

### RDA Toolkit Login

- These credentials are used to access the RDA Toolkit online help for fields.

  - **Account ID**
  - **Password**

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1. For Default Editor, select a default record editor.
   - **MARC 21 View**
   - **Text View**

2. For Default Record Format, select a default record format.
3. For Default Holding Library Code (049), select a **holding library code** from the drop-down list.  
   Note: The list of available locations is specific to the locations available for your institution. The default option is the default from the Holding Library Code list from the database. This code is for bibliographic records, saved work in-progress records, and local holdings records.

4. For Default Classification Scheme, select a classification scheme from the drop-down list.
   - **Library of Congress (default)**
   - **Dewey Decimal**  
     Note: When creating labels, the call number will be pulled from an 092 field.
   - **National Library of Medicine**
   - **Canadian National Library**
   - **Government Document**
   - **National Agricultural Library**
   - **Universal Decimal**

5. For Default Cutter Type (092), select a cutter type.
   - **Four-Figure (default)**
   - **Sanborn**

6. For Fields for New Constant Data Records, select the **fields** and **field groups** you want to include in the record.

7. For Controlled Headings:
   1. Enable or disable adding equivalent subject headings when controlling all headings in a record. By default, add equivalent subject headings is disabled.
      - When enabled, the system checks for uncontrolled headings present in a bibliographic record and tries to control the headings against the appropriate authority files and then attempts to add equivalent subject headings for the controlled headings if the record contains controlled RVM, AAT, LCSH, or MeSH headings. If equivalent subject headings are found, they are controlled to their respective authority file.
      - When disabled, the system only checks for uncontrolled headings present in a bibliographic record and tries to control the headings against the appropriate authority files.
      
      Note: Although the system attempts to control all headings when you add, validate, or replace a bibliographic record, it will only attempt to add equivalent subject headings when you select Control All Headings from the Record menu in the bibliographic record.

   2. Enable or disable auto-suggestions for Canadiana Names and Library of Congress Names. By default, auto-suggest is enabled.
      
      When enabled, auto-suggestions for field-appropriate Canadiana and Library of Congress Names start with the first keystroke in new and existing records whose: Auto-suggested headings are automatically controlled when selected. If you are editing an existing field, you must first follow the procedure to remove a link from a controlled heading in a MARC 21 record.

      - 040 field subfield $b is identified as French ($b fre) for Canadiana Names.
      - 040 field subfield $b is blank or identified as English ($b eng) for Library of Congress Names.
      - 100, 110, 111, 130, 700, 710, 711, 730, 800, 810, 811, and/or 830 field is blank.
8. If you are profiled for RDA Toolkit authentication via account ID and password, enter your **Account ID** and **Password**.
9. Click **Save**.

**Set preferences for authority records**

Note: Your institution must have a valid MARC organization code to view this tab.

**Working with records: Authority Records tab - Image**

1. Click the **Authority Records** tab.
2. For Default Authority Type, select the default authority record type for new records.
   - **Canadiana**
   - **LC (default)**
3. For Default MARC Organization Code, select a **MARC organization code** from the drop-down list.
   Note: The list of available codes is specific to the codes available for your institution.
   - If there is only one organization code, it displays as read-only.
   - If there is no code, you cannot create authority records.
4. Click **Save**.
Set preferences for local holdings records

Working with records: LHRs tab - Image

1. Click the LHRs tab.

2. For Copy Number, enable or disable the display of 852 $t information in your records. By default, Display 852 $t information in list of LHRs is enabled.
   - If enabled, enter a prefix for this information in the Prefix form field (e.g., c., copy, copy number, etc.).

3. For Display Information in Records, enable or disable the display of Shared Print and/or Lending Policy columns in the LHR list under a bibliographic record and in the headers of both the bibliographic and local holdings record. By default, Shared Print and Lending Policy columns do not display. Enable if your library participates in either the Shared Print program or Interlibrary Loan.

4. For Fields for New Constant Data Records, click View Fields to expand the available LHR fields accordion. Select the fields you want copied to a new constant data record from an existing LHR or LHR constant data record when performing a derive action.

5. Click Save.