WorldShare Record Manager guide for Shared Print Registration Service users

Learn how to search, edit, and delete local holding records in WorldShare Record Manager with the Shared Print holding type flag.
Note: If you do not have access to Record Manager, please request access at the following link. Record Manager is available to anyone with a current cataloging subscription.

Overview

Use this guide if your library has participated in the Shared Print Registration Service and you would like to learn how to search, edit, and delete Local Holding Records in WorldShare Record Manager with the Shared Print holding type flag.

User preferences

User preferences must be updated to display Shared Print holdings in Record Manager. If your preferences are not updated, you will not be able to successfully search for Shared Print titles.

1. Sign into Record Manager.
2. Click User Preferences.
3. Open the Searching – Basic accordion.
   a. On the LHRs tab, select the Shared Print checkbox under Display Information in Search Results.
4. Open the Working with Records accordion.
   a. On the LHRs tab, select the Shared Print checkbox under Display Information in Records.
5. Click Save.

Search Shared Print records held by your library

Once your user preferences are updated, you can search for your Shared Print records using three different options: an advanced bibliographic record search, an index search, or a Local Holdings Records Action Note search.

Advanced search

1. Sign into Record Manager.
2. Click Advanced Search under the search box.
3. Select the following:
   a. Search Scope: All WorldCat
b. Index(es): Select **Shared Print Institution (sh:)** from the drop-down list.

c. Search box: Enter your library's **OCLC symbol**.

d. Click **Search**. Results are returned for all bibliographic records with associated LHRs containing the Shared Print holding type flag for your institution.

**Advanced search dialog window - Example**
4. Click the title of a bibliographic record to display LHRs with the Shared Print column specifying the LHRs with the holding type flag (Yes).

**Bibliographic record with LHR Shared Print column displayed - Example**

![Bibliographic record with LHR Shared Print column displayed](image)

**Index search**

1. Sign into Record Manager.
2. Select the following:
   a. Data Type: **Bibliographic Records**
   b. Scope: **All WorldCat**
   c. Index: **Keyword**
d. Term(s): Enter sh:Library's OCLC symbol (e.g., sh:OCWMS)

**Index search - Example**

![Screenshot of WorldShare Record Manager index search example]

3. Click **Search**. Results are returned for all bibliographic records with associated LHRs containing the Shared Print holding type flag for your institution.

**Local Holdings Records search**

1. Sign into Record Manager.
2. Select the following:
   1. Data Type: **Local Holdings Records**
   2. Scope: **My LHRs**
   3. Index: **Action Note**
4. Term(s): Enter committed to retain

3. Click Search.

Local Holdings Record search results - Example

4. Click the title to view the bibliographic record.
   Or
   Click the call number link to view the LHR.

Search Shared Print records across your group

You can search for Shared Print records held by libraries in your group by searching the group symbol. The search limits to bibliographic records for which members of a profiled group have created LHRs with the Shared Print holding type flag.

You may want to search across your group to determine whether you need to retain a title or see if a title has already been retained by another library in your group.

Advanced search

1. Sign into Record Manager.
2. Click Advanced Search under the search box.
3. Select the following:
   a. Search Scope: All WorldCat
   b. Index(es): Select Shared Print Group (sg:) from the drop-down list.
c. Search box: Enter your group symbol.
d. Click Search. Results are returned for all bibliographic records held by your group.

**Edit a Local Holdings Record**

1. Sign into Record Manager.
2. Navigate to the Local Holdings Record you would like to modify using one of the search methods outlined above.
3. Make changes to the 583 field as needed if updating your retention commitment.
   a. 583 $f Archiving Program Name (required)
   b. 583 $c Start date of your retention commitment (required)
   c. 583 $d Expiration date of your retention commitment (required)
   d. 583 $j Site of Action (optional)
   e. 583 $u URL to Documentation for Archiving Program (optional)
   f. 583 $z Public note (optional)
   g. 583 $5 Archiving Institution (optional)
4. Click Save.

**Remove Shared Print commitment from Local Holdings Records**

The Shared Print flag and retention statement can be removed from a LHR for titles that you are no longer committing to retain but are keeping the title in your collection. Libraries using WorldShare Management Services or libraries capturing holdings information in LHRs for Interlibrary Loan purposes may wish to use this option if they are no longer committing to retain a title.

It is important to note that this process removes all 583 fields from the LHR and the Shared Print holding flag. If you do not want to remove all 583 fields in the record because you have commitments for multiple groups, you can use the red minus to remove the desired row and save the LHR.

If you are not using the Local Holdings Record for any other reason you can delete the LHR using the Delete option under Record > LHR > Delete.

1. Sign into Record Manager.
2. Navigate to the Local Holdings Record you would like to remove the Shared Print Commitment from using one of the search methods outlined above.
3. Within the LHR, select **Record > Remove Shared Print Commitment**.

**Navigate to Remove Shared Print Commitment - Example**

4. Click **Remove** to confirm in the dialog box you would like to remove the Shared Print Commitment. The 583 field(s) are removed from the LHR.

**Remove the Shared Print Commitment dialog - Example**
LHR with deleted 583 field(s)
5. Click **Save** to complete the removal of the Shared Print flag.

**Saved LHR - Example**

![Screen capture of Saved LHR example](image-url)