WorldShare Record Manager release notes, October 2019

Last updated: Fri, 07 Aug 2020 16:37:24 GMT

Release Date: October 28, 2019

Introduction

This release of WorldShare Record Manager provides the ability to edit your Local Holdings Records (LHRs) in bulk. Previously, LHR edits were handled either via data sync or manually one at a time. This new functionality is designed to greatly improve your efficiency when editing Local Holdings Records by allowing you to update up to 9,000 LHRs at one time.

Bulk edit of local holdings records

Note: In order to have access to this feature, catalogers will need to have the role CATALOGING_BULK_EDIT added to their WorldShare account. This role can be added to your account by any user at your institution that has the Cataloging INST Admin role. For more information, see Cataloging roles.

Overview

The Local Holdings Records (LHR) Record Work List allows you to apply one or more scripts to multiple records at one time, thus greatly improving your workflow efficiency. Work lists are user-specific, and each Record Manager user can create and manage one LHR record work list at a time.

With LHR bulk edit functionality, you can:

- Add up to 9,000 records to a work list
- Preview changes for up to 25 records at a time before applying a script
- Update a maximum of 9,000 records when applying a script

What LHR bulk edits are possible?

Now you can bulk edit the following LHR fields in these ways:

- 008: Update Lending Policy
- 008: Update Reproduction Policy
- 852: Update Branch
- 852: Update Permanent Shelving Location

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_…

Printed: Sun, 27 Mar 2022 11:15:43 GMT
- 876: Add, update, or delete Temporary Shelving Location
  - Unconditional or with barcode check
- Add any LHR field using Field Strings

Search for LHRs and send to Record Work List

Search for the records you wish to edit using the My LHRs scope in the left panel. In your search results, check the boxes for the LHRs you want to edit and click Send to Record Work List to send them to the Record Work List. You can check the box in the column heading row to select all records on a page or check selected records across pages. If preferred, you can also send your entire search results to the Record Work List (up to 9,000 records).

Add records using control numbers or barcodes

Additionally, you may choose to populate your record work list by supplying a list of LHR control numbers or Barcodes. From the Record Work List page, select Actions > Add:
Copy and paste your list of barcodes or control numbers into the dialog box and click Add:
Note that if you choose to use control numbers, you must use the LHR control numbers rather than the bibliographic OCLC numbers.

**Go to Record Work List and select your script**

To access your LHR record work list, navigate to **Record Manager > Record Work Lists**. Click the **LHR** tab. Select a script to perform the bulk edit of your choice. Make selections for Field, Subfield and Matching Options based on your needs and the requirements of the script you have chosen.
Preview your changes

Select up to 25 records and then go to Actions > View Records > Preview Records with Script Changes to preview records before applying your script.
Preview display

You can toggle from current record view to preview view by clicking a single button. Preview display shows LHRs as they would appear after the update, as well as records that would not be updated, including any validation errors.
Current Records display

View Current Records display shows records prior to applying the intended script change.
Edit the records

You can apply the script to either the entire record work list of up to 9,000 records, or only those records that you have selected. Choose the desired action from Actions > Edit.
Confirm your edits

A confirmation dialog box allows you to confirm the number of records that will be affected by the Edit process. Click the Apply button to initiate the process.
Progress summary

After you confirm that you wish to apply the script to your records, your job is put in the queue. Jobs are processed in order of submission. As the records are updated, the Record Work List page is locked, but you can continue to do other work in Record Manager if desired. The page will automatically refresh periodically and update you on processing status.

Completed summary

When processing is complete, a summary of the Edit activity is displayed.
For additional information about this new functionality please review the LHR Bulk Edit Documentation.

Important links

Release overview sessions

To help you become familiar with the new features, enhancements and improvements included in a release, the Record Manager product team holds release overview sessions. The sessions are recorded and archived for future viewing in the OCLC Community Center. Check the Record Manager Community Center Events page for dates and registration information. Please register even if you are unable to attend, so you will receive a link to the recorded session.

Product website(s)

- WorldShare Record Manager

Support website(s)

Support information for this product and related products can be found at:

- Record Manager support and training
• Release notes and known issues
• Contact OCLC Support
• OCLC Community Center
• Browser compatibility chart