WorldShare Record Manager release notes, August 2020

Last updated: Mon, 14 Sep 2020 20:19:50 GMT

Release Date: August 29, 2020

Introduction

This release of WorldShare Record Manager provides multiple enhancements to bibliographic and local holdings record (LHR) constant data as well as several bug fixes. These enhancements will help you to better utilize constant data functionality.

- Previously the option to apply constant data was only available while using the bibliographic and (Local Holdings Record) editors. There are now options to apply constant data in the following scenarios:
  - A bibliographic constant data record can now be selected and applied immediately when a new record is created from the Record Manager menu.
  - LHR and bibliographic records can now be derived with default constant data.
  - LHR and bibliographic records being derived can now be opened in the Apply Constant Data page.
  - On the Preview Constant Data Page -
    - Bibliographic constant data records can now be viewed side-by-side with a bibliographic record being edited.
    - LHR constant data records can now be viewed side-by-side with an LHR record being edited.
    - You can preserve 852 subfields in the edited record before constant data is applied, previously there was no option to preserve this data.

- Bug fixes:
  - Call number browse display was missing the bibliographic information if the call number started with a plus symbol.
  - Corrections were made to the carrier type list in the 338 field.

- Known issue:
  - When applying constant data to a bibliographic record or a local holdings record, the edit icon does not display on the tab.
  - After applying constant data to a derived bibliographic record on the Preview Constant Data page, the record description will read "Edit Null."

Many of these enhancements are the direct result of your feedback.
Recommended actions

For this release, we recommend that you review the follow-up actions below and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These actions identify updates that we have determined as significant for most institutions. We encourage you to review all of the items in the release notes to determine whether there are other items that might require additional action or follow up by your institution.

Follow-up actions

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>In order to use the &quot;Apply Default Constant Data&quot; options when deriving MARC data from records or applying constant data, your institution will need to select a default constant data record for both bibliographic and LHR records in the Toolbox before the option is available.</td>
</tr>
</tbody>
</table>

New features and enhancements

Constant Data Preview Page

Preview Page for Bibliographic Records

• When applying constant data to a bibliographic record, from the record menu, you will now have the option to immediately apply the default constant data record or open the Preview Constant Data page for bibliographic records. Previously, there were only options to apply or derive Constant Data.
Upon selecting the option to "Apply and Preview Constant Data," you will be navigated to the Preview Constant Data page:
The Apply and Preview page will allow you to select any saved bibliographic constant data record in the toolbox and preview the overlay with the record being edited.

- You may also choose which field set(s) to apply - fixed, variable, or both.
- Overlays from the constant data record to the edited record will be highlighted in blue.
- The hyperlinked OCLC number will navigate back to the edited record.
- Upon selecting “Apply Constant Data,” you will be navigated back to the edited record, and a success message will appear, displaying updated fields:

Preview Page for LHR Records

- When applying constant data in the LHR editor using the record menu, you will now have the option to immediately apply the default constant data record, or open the Preview Constant Data page for LHRs. Previously, there were only options to apply or derive LHR Constant Data.
Upon selecting the option to "Apply and Preview Constant Data," you will be navigated to the preview constant data page:
• The Apply and Preview Constant Data page will allow you to select any saved LHR constant data record in the Toolbox and preview the overlay with the record being edited.

• You may also choose which field set(s) to apply - fixed, variable, or both.

• Overlays from the constant data record to the edited record will be highlighted in blue.

• The hyperlinked LHR Control Number will navigate back to the edited record.

• You will have the option to preserve 852 subfields in the edited record as needed from the following list -
  - ǂa Location
  - ǂb Sublocation or collection
  - ǂc Shelving location
  - ǂd Former shelving location
  - ǂe Address
  - ǂf Coded location qualifier
  - ǂg Noncoded location qualifier
  - ǂh Classification part
  - ǂi Item part
  - ǂj Shelving control number
  - ǂk Call number prefix
  - ǂl Shelving form of title
  - ǂm Call number suffix
  - ǂn Country code
  - ǂp Piece designation
  - ǂq Piece physical condition
  - ǂs Copyright article-fee code
  - ǂt Copy number (}
  - ǂu Uniform Resource Identifier
  - ǂx Nonpublic note
  - ǂz Public note
2. Source of classification or shelving scheme
3. Materials specified

- By default, the following subfields are automatically selected -
  - Classification part
  - Item part

- Upon selecting "Apply Constant Data," you will be navigated back to the edited record, and a success message will appear, showing updated fields:

Create Record With Constant Data

Create Record Changes
- When selecting "Create Record" from the Record Manager menu, you will now have the option to select any saved
bibliographic constant data record. This option was previously unavailable.

- Upon selecting a saved constant data record and clicking "Create," you will be taken to the MARC editor page that will display a success message, detailing the field(s) overlayed from the constant data record:
  - Note - this feature will be unavailable if you select "Authority Record" when making a data type selection, or if you select "Text View" as the record editor.
Deriving Records with Constant Data

Deriving Bibliographic Records with Default Constant Data

- You will now have the option to derive a bibliographic record with the default bibliographic constant data record applied. This option can be found by navigating to the "Record" menu option and then selecting "Derive Bibliographic Record" while on the MARC editor page. Previously, only the "Derive" option was available.
• Upon selecting "Derive with Default Constant Data", you will be navigated to a new tab with the derived record displayed in the MARC editor and a success message will display, detailing the fields that have been overlaid in the derived record:
  ◦ **Note:**
    ▪ Selecting the "Derive" option will derive the record without applying any constant data records.
    ▪ You must first select a default constant data record from the Toolbox before the "Derive with Default Constant Data" option is available.
Deriving Bibliographic Records using Constant Data Preview

- You will now have the option to derive a bibliographic record and open the Preview Constant Data page. This option can be found by navigating to the "Record" menu option and then selecting "Derive and Preview Constant Data" while on the bibliographic editor page:
After choosing this option, you will be navigated to the Preview Constant Data page:
The Apply and Preview page will allow you to select any saved bibliographic constant data record in the toolbox and preview the overlay with the record being derived.

You may also choose which field set(s) to apply - fixed, variable, or both.

Overlays from the constant data record to the edited record will be highlighted in blue.

Upon selecting "Apply Constant Data," you will be navigated to the derived record in the MARC editor, and a success message will appear detailing changes:
Deriving LHRs with Default Constant Data

- You will now have the option to derive an LHR record with the default LHR constant data record applied. This option can be found by navigating to the "Record" menu option and then selecting "LHR" while in the LHR editor:
Upon selecting "Derive with Default Constant Data", you will be navigated to a new tab with the derived LHR displayed in the LHR editor and a success message will display, detailing the fields that have been overlaid in the derived record:

- **Note:**
  - Selecting the "Derive" option will derive the LHR record without applying any LHR constant data records.
  - You must first select a default LHR constant data record from the Toolbox before the "Derive with Default Constant Data" option is available.
Deriving LHR Records using Constant Data Preview

- You will now have the option to derive an LHR record and open the Preview Constant Data page. This option can be found by navigating to the "Record" menu option and then selecting "Derive and Preview Constant Data" -
Upon selecting the option to "Derive and Preview Constant Data," you will be navigated to the Preview Constant Data page:
The Apply and preview page will allow you to select any saved LHR constant data record in the Toolbox and preview the overlay with the record being edited.

You may also choose which field set(s) to apply - fixed, variable, or both.

Overlays from the constant data record to the edited record will be highlighted in blue.

You will have the option to preserve 852 subfields in the edited record as needed from the following list -

- `a` Location
- `b` Sublocation or collection
- `c` Shelving location
- `d` Former shelving location
- `e` Address
- `f` Coded location qualifier
- `g` Noncoded location qualifier
- `h` Classification part
- `i` Item part
- `j` Shelving control number
- `k` Call number prefix
- `l` Shelving form of title
- `m` Call number suffix
- `n` Country code
- `p` Piece designation
- `q` Piece physical condition
- `s` Copyright article-fee code
- `t` Copy number
- `u` Uniform Resource Identifier
- `x` Nonpublic note
- `z` Public note
- `2` Source of classification or shelving scheme
- `3` Materials specified
By default, the following subfields are automatically selected:

- Classification part
- Item part

Upon selecting "Apply Constant Data," you will be navigated to the newly derived record and a success message will appear that details field updates:

Use new LBD and LHR reports to retrieve statistics

You now have access to one new standard metadata report and two new drill-down standard reports in WorldShare Reports that enable you to retrieve statistics regarding your local bibliographic data (LBD) record and local holdings records (LHR) bulk edit activities. The reports include:

- **Daily LHR Maintenance Summary** – This report allows you to report on up to a seven-day timespan of LHRs added, deleted, moved, and updated in addition to removed shared print commitments.

- **Update Bulk LBDs (Record Work Lists)** – This drill-down report allows you to see statistics for LBDs that were edited in bulk over a period of time. This report can be accessed through the Daily Record Manager Actions report and the Monthly Record Manager Actions report.

- **Update Bulk LHRs (Record Work Lists)** – This drill-down report allows you to see statistics for LHRs that were edited in bulk over a period of time. This report can be accessed through the Daily LHR Maintenance Summary report and the Monthly LHR Maintenance Summary Report.
Bug fixes

Call number browse display missing bibliographic information if the call number started with a plus symbol
The title information in the Bibliographic Information column was missing from the call number browse display results if the call number for the item started with a plus (+) symbol. This has been updated to display the title if the call number starts with the plus symbol.

Corrections in the carrier type list in the 338 field
A new carrier type "sw - Audio wire reel" has been added to the dropdown list in the 338 field for bibliographic records and local holdings records. Also, the text for "Sound track reel" has been changed to "si - Sound-track reel".

Known issue

When applying constant data to a bibliographic record or a local holdings record, the edit icon does not display on the tab

- When you have a bibliographic record or a local holdings record (LHR) open and apply constant data to the record, the orange edit icon is not appearing on the tab to show the record was edited.
- After applying constant data to a derived bibliographic record on the Preview Constant Data page, the record description will read "Edit Null."

Important links

Product Insights: WorldShare Record Manager
To help you become familiar with the new features, enhancements and improvements included in this release, there is a Product Insights sessions scheduled. Please note the session time zones when registering. The session will be recorded and archived for future viewing on the OCLC Community Center. Please register, even if you are unable to attend, to receive a link to the recorded session.

Product Insights: WorldShare Record Manager
Date: August 26, 2020
Time: 10:00 am - 11:00 am EDT (UTC-4)
Registration: Use this link to register for the session.
Recorded session: Use this link to view the recorded session.
WorldCat Validation release notes

WorldCat Validation release notes provide current OCLC-MARC updates; changes to tagging conventions and coding practices for Bibliographic, Authority, and Holdings records; and new MARC codes.

Virtual AskQC office hours

Join OCLC Metadata Quality staff to discuss WorldCat quality issues and cataloging questions. Visit AskQC for information about upcoming office hours, previous office hour recordings, and supporting materials.

Support website(s)

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

- WorldShare Record Manager
- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart