Contents

Introduction ................................................................................................................................................. 2

New Features ............................................................................................................................................... 3
  New Collections button .......................................................................................................................... 3
  Retention of User Submitted OCLC Numbers ....................................................................................... 4
  Edit knowledge base titles in Record Manager ................................................................................... 4
  Knowledge base notes now display in WorldCat Discovery ............................................................... 5

Enhancements ........................................................................................................................................... 6
  Support for LHR/LBD indexes ............................................................................................................... 6
  Encoding Level 3 index ......................................................................................................................... 6
  Option to output a full collection each time ......................................................................................... 6
  Matching Improvements – Rematch Complete ................................................................................... 6
  Retention of deselected classes of U.S. government documents ....................................................... 7
  Option to include the Vendor ID in MARC output ............................................................................. 7
  WorldCat Holdings reports now sorted by action ............................................................................. 7

Bug fixes .................................................................................................................................................. 9
  WorldCat Holdings report now includes Collection and Provider name for deleted holdings ....... 9
  Delete Records no longer delivered when prompt response for deletes is “No” ............................... 9
  “Confirm Collection” dialog box now displays properly .................................................................... 9

Important links ....................................................................................................................................... 10
Introduction

The following release notes are for the February 2015 install of WorldShare Collection Manager and WorldCat knowledge base scheduled for February 23. This release brings 11 new features and enhancements in addition to several bug fixes. Many of the enhancements can be directly attributed to valuable feedback from our users.
New Features

New Collections button

There is now a **New Collections** button in the left navigation menu of Collection Manager. Selecting this option will retrieve all knowledge base collections sorted by Created date in reverse chronological order. Created date is now displayed within the collection list.

The Created and Selected dates are now included in the Properties for individual Local collections:
Retention of User Submitted OCLC Numbers
(This feature was released in December, 2014 during an install outside of our normal release schedule.)

With the release of the Cooperative Management features, libraries are now permitted to alter the contents of global knowledge base collections. We have seen some great activity from the community helping us to correct existing records or add content that may have been missing. The most common type of change we’ve seen was the addition of OCLC numbers where those were missing.

Because the OCLC numbers are being added by an algorithm for the most part, the community-provided changes to just that one value were sometimes lost after the algorithm was re-run. With the December release we have added special handling to the data updating process and OCLC number algorithm to ensure that community provided changes are not lost.

This means that OCLC number changes should be protected against inadvertent loss by other data activities. These values may still be explicitly changed by OCLC staff or by other members of the community if a better match is determined.

Edit knowledge base titles in Record Manager
(This feature was released in December, 2014 during an install outside of our normal release schedule.)

For any library using WorldShare Record Manager, we have added a small pencil icon next to the OCLC number in the Identifiers column of the WorldCat knowledge base collection title list, for all records with an OCLC number. Clicking on the pencil icon next to the OCLC number will take you into the Record Manager Edit screen for that WorldCat master record. Clicking the OCLC number itself will still take you to the WorldCat.org view of the record.
FYI, the pencil icon in the **Title** column still allows you to edit the KB title record. The pencil in the **Identifiers** column will bring you to the edit screen for that WorldCat master bibliographic record in Record Manager.

**Knowledge base notes now display in WorldCat Discovery**

The WorldCat Discovery team has implemented the display of WorldCat knowledge base notes at both the collection and title level. Any Public, Coverage, or Location notes that you add to your KB titles or collections will now display in WorldCat Discovery. Staff notes will only display to staff within the WorldShare interface. In WorldCat Discovery the KB notes are displayed as shown in the example below. The first note comes from the Collection-level setting and the next three from the Title-level settings. Each note is preceded by a bolded label indicating the type of note.
Enhancements

Support for LHR/LBD indexes
Indexes for searching Local Holdings Records and Local Bibliographic Data are now supported in Collection Manager for the creation of WorldCat query collections. For more information about these indexes, please visit http://www.oclc.org/support/services/worldcat-local/documentation/local_data_WorldCat_Local.en.html.

Encoding Level 3 index
The encoding level 3 index (lv:3 = abbreviated level) is available for searching for bibliographic records in WorldCat with encoding level 3. The new index only allows for searching the value 3. You can use this index to create a WorldCat query collection for locating records within your WorldCat holdings that need enhancements. [Example: li:OCWMS AND lv:3] This index is also now available in Record Manager and Connexion.

Option to output a full collection each time
There is now an option to receive the full output of a query collection or knowledge base standard collection with each MARC record delivery, based on user selected frequency. Previously, the full output could be delivered initially, with only updates delivered in subsequent output. This option appears when MARC Record Delivery is enabled at the collection level.

Matching Improvements – Rematch Complete
After making some changes to our matching process for both the July and October 2014 releases, in November we undertook a complete rematch of all items in the knowledge base to ensure that each
record ran through our improved matching processes. Overall OCN coverage for all items in the Global knowledge base increased from approximately 75% to about 83%, upon completion of the rematch.

RetentionPolicy of deselected classes of U.S. government documents
U.S. government document collections based on FDLP class selections have been enhanced to allow for the addition of new titles while preventing the loss of titles included in an institution’s historic selection profile. Libraries who participate in the auto-loading of these collections can now make changes to their FDLP profiles and still retain titles that were previously received. For a library’s deselected classes, no new titles will be added, WorldCat holdings will be retained, and no delete MARC records will be output.

Option to include the Vendor ID in MARC output
A new value has been added to the drop down menu for MARC record customization. Users can now select the Vendor ID as an option for output in their MARC records. This is helpful to libraries that receive records for government documents, because the class number for government documents (074) is stored in the knowledge base as the Vendor ID.

WorldCat Holdings reports now sorted by action
(This enhancement was installed in December, 2014 by the team that develops and supports the OCLC Usage Statistics Portal)
The WorldCat Holdings reports in OCLC Usage Statistics, as well as those received via email, are now sorted so that Set holdings display at the beginning of the report, followed by Delete holdings.
Bug fixes

WorldCat Holdings report now includes Collection and Provider name for deleted holdings

Previously, the Collection Manager WorldCat Holdings report lacked the Collection and Provider name for deleted holdings. This deficiency has been corrected and both the Collection and Provider name are now populated for deleted holdings.

Delete Records no longer delivered when prompt response for deletes is “No”

Previously, certain conditions would cause delete records to be delivered even when the user responded “No” to the prompt for delivery of delete records upon deletion of a collection. This issue has been resolved with the February install. Delete records are no longer delivered unless the prompt is answered in the affirmative.

“Confirm Collection” dialog box now displays properly

Previously, the “Confirm Collection” dialog box that is displayed upon creation of a WorldCat query collection was not properly formatted. This issue has been resolved with the February install.
Important links

Offices hours

- Tuesdays, 12 noon – 1:30 pm US Eastern Time
  WebEx link for office hours
  Call-in toll-free number (US/Canada): 1-877-668-4490
  Access code: 712 496 861

Release update session

- Monday, March 2, 2:00 – 3:00 pm US Eastern Time – register here

Product Web site

More product information can be found at:

- WorldShare Metadata

Support Web sites

- Collection Manager Support & Training
- Collection Manager Release Notes
- Browser compatibility chart
- Known Issues

Notices

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