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Introduction

The following release notes are for the October 5, 2017 release of WorldCat Discovery.

WorldCat Discovery October release highlights

As a result of ongoing feedback from members about specific needs, users can now group or ungroup related editions and formats on any search. To improve the overall user experience, “Access Online” links only appear based on availability to the user, and OPAC real-time availability is now faster and more reliable. Additionally, the advanced search page is more accessible and includes more intuitive default settings.

Recommended actions

- If your library uses an embedded search box, review this Community Center discussion for ideas to incorporate search filters into the search experience.

Include Request ID with problem reports

When reporting an issue with WorldCat Discovery, it is extremely helpful to include the Request ID. The Request ID is found at the bottom of the screen on which the issue occurred. Including this information allows us to directly trace what happened on the request we are troubleshooting.

Request ID

RES-165-0-24

dSb996fS-e20c-481c-aff7-bb5f21c778d4
New features and enhancements

Group and ungroup editions and formats on any search
Edition clustering is a critical component of a successful discovery experience, but there are specific cases when grouping editions and formats may not provide an optimal view of results. In these scenarios, a list of ungrouped editions can help users find all formats and editions available to them.

In response to input about the need to view an unclustered list of editions and formats, users can now choose to display editions and formats as a group or as individual records. This option is prominently displayed in the interface for convenient use with any search.

Edition clustering background
User testing proves clustering results into related editions and formats benefits users in common cases. In February 2017, the logic to choose the default edition changed to display the most recent, locally-held edition on the search results. This kind of edition grouping addresses key concerns users have when looking for materials in their library. For instance, we know many users trust their library to offer whatever is most appropriate, that many users know exactly what edition they want and how to describe it; and that many want to explore, but can’t specify exact attributes of what they need. (For more on the benefits of edition clustering, please see our detailed explanation on Edition Clustering in WorldCat Discovery.)

We look forward to enhancements in the coming months that continue to build on the power of edition clustering.

Choose when to group and ungroup editions and formats
Users can group editions using the “Group related editions” option within the “Search Tools”:

The default for “Group related editions” is based on the selected sort option.

- Best Match, Recency, Library, Author, Date and Title default to grouping related editions (“Group related editions” is checked).
- “Most Widely Held” defaults to not grouping related editions (“Group related editions” is not checked). Users can override the default at any time, and their preference will remain during that session.
In this example, ungrouping related editions reveals a print and electronic edition is available:

Take advantage of the new grouping option in search boxes by using a “clusterResults=on” or “clusterResults=off” parameter in the search URL. If no selection is made, the default grouping is applied based on the sort option selected. Be sure to use the “clusterResults” parameter with the URL Resource Name “/search” and not “/external-search”.

Please note: The URL Resource Name “/external-search” should no longer be used. Instead, replace “/external-search” with “/search”. “/external-search” will still work for existing functionality, but will not support any new functionality added to the search URL. For more information, consult our updated documentation to embed a search box on your website. To test new configurations, simply perform the search on your institution’s WorldCat Discovery user interface and copy the parameters from the URL.

Access to full-text links meet user expectations

The display of full-text links is modified to help users better understand the type of content available.

Users have many options to access full-text content. For example, they may select the “Access Online” button from initial search results or they may navigate to a detailed record. The full-text links originate from a variety of sources, such as the WorldCat knowledge base, WorldCat master records, LHR’s, OPAC’s or OpenURL resolvers.

Currently, the “Access Online” button resolves to the first link in the Detailed Record -> Availability -> Access Online links list. We know users typically expect this button to send them directly to the full-text referenced by the record, and we also know the experience can be jarring when unexpected links appear under the button.

To ensure a better experience, links are now grouped into three types based on their likely fulfillment of full-text content to the user: primary “Access Online” button links, “Other Links” and “More Information” links.
Primary “Access Online” links inform the “Access Online” button

Primary “Access Online” links are grouped together as the most likely to resolve to full-text content. If there are no primary links, there will be no “Access Online” button in the search results.

Primary links are used by the “Access Online” button in the following order:

1. WorldCat knowledge base links
2. If no WorldCat knowledge base link, then Local Holdings Record links
3. If no Local Holdings Record link, then Online Public Access Catalog (OPAC) links
4. If no OPAC link, then Open Access MARC 856 and 956 links

If the link is from the WorldCat knowledge base, the “Access Online” button label will inherit the name of the link. For example, the link to an item identified in the WorldCat knowledge base as an eBook will display as “View eBook.” Otherwise, the button will use the default “Access Online” label:
“Other Links” display only on the detailed record

“Other Links” are grouped together based on their unlikely access to full text by the average user. They display only on the detailed record, and the “Access Online” button does not use them. These links consist of non-open access MARC 856 links with first indicator 4 and second indicator 0, and they are collapsed by default:

“More Information” links are metadata links

“More Information” links are grouped together as metadata links, or links about content rather than the content itself. “More Information” links display on the Detailed Page -> Description -> More Information, and the “Access Online” button does not use them. These links consist of MARC 856 links with first indicator 4 and second indicator 1 or 2:
All three link-type displays are still configurable in Service Configuration
Configure which links display on search results and detailed records in Service Configuration -> My WorldCat.org -> Full Text and Open Access Links. You can choose to hide or display links based on their source. For example, you can choose to show or hide MARC 856 non-open access links from the master WorldCat record.

This functionality has not changed, but the display was modified to distinguish WorldCat Discovery functionality from WorldCat Local:

### Full Text and Open Access Links

<table>
<thead>
<tr>
<th>Configuration full text access and display for WorldCat Local and WorldCat Discovery</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EZproxy</strong></td>
</tr>
<tr>
<td>Enter your EZproxy base URL. This will prepend any UHR links to direct off-campus users through your proxy server. Click here for more about configuring EZproxy for WorldCat knowledge base links.</td>
</tr>
<tr>
<td><strong>EZproxy base URL</strong></td>
</tr>
<tr>
<td>Example value: <a href="http://ezproxy.utc.edu/login?path=">http://ezproxy.utc.edu/login?path=</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WorldCat Local Search Results // WorldCat Discovery Search Results and Detailed Views</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Links from the WorldCat knowledge base to full text content.</strong></td>
</tr>
<tr>
<td>(Configure the display order in the WorldCat Discovery section of Collection Manager &quot;Settings&quot; module.)</td>
</tr>
<tr>
<td><strong>Links from UHRs</strong></td>
</tr>
<tr>
<td>(Exclude UHRs in the &quot;SPARC Libraries, Locators and Discovery&quot; module.)</td>
</tr>
<tr>
<td><strong>Links from Master WorldCat record 556 and 966 to open access content / free content</strong></td>
</tr>
<tr>
<td>gov / edu documents (i.e., GPO.gov, ERIC, etc.)</td>
</tr>
<tr>
<td>HathiTrust</td>
</tr>
<tr>
<td>Internet Archive (Archive.org) / Project Gutenberg (Gutenberg.org)</td>
</tr>
<tr>
<td>WorldCat Digital Collection Gateway (i.e., OAisles, CONTENTdm, etc.)</td>
</tr>
<tr>
<td>Other e.g., MARC 808</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WorldCat Local Detailed Record Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Links from the WorldCat knowledge base to full text content.</strong></td>
</tr>
<tr>
<td>(Configure the display order in the WorldCat Discovery section of Collection Manager &quot;Settings&quot; module.)</td>
</tr>
<tr>
<td><strong>Links from UHRs</strong></td>
</tr>
<tr>
<td>(Exclude UHRs in the &quot;SPARC Libraries, Locators and Discovery&quot; module.)</td>
</tr>
<tr>
<td><strong>Links from the Master WorldCat record 856 to non-open access content / non-free content.</strong></td>
</tr>
</tbody>
</table>

Re-run misspelled searches with “Did you mean” suggestions
Misspelled words in search queries populate a “Did you mean” suggestion. The “Did you mean” suggestions display as follows:

- Shows the corrected word in context of the user’s entire query.
- Preserves all punctuation and capitalization in the “Did you mean” suggestion.
- Includes names as suggestions.
- Blocks suggestions containing numbers or index labels.
- Offers suggestions that match the language of the user’s browser.
Two factors determine if and how a “Did you mean” suggestion will display:

1. The user’s browser language must be supported for a “did you mean” suggestion to display.
2. The user’s location determines the dialect. Unsupported locations defer to the user’s browser language and use the browser language’s default location to determine the dialect.

The following browser languages and user locations are currently supported:

<table>
<thead>
<tr>
<th>Browser Language</th>
<th>User Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dutch</td>
<td>Netherlands (Default)</td>
</tr>
<tr>
<td>English</td>
<td>Australia, Canada, United Kingdom, United States (Default)</td>
</tr>
<tr>
<td>French</td>
<td>France (Default)</td>
</tr>
<tr>
<td>German</td>
<td>Germany (Default), Switzerland</td>
</tr>
<tr>
<td>Italian</td>
<td>Italy (Default)</td>
</tr>
<tr>
<td>Norwegian</td>
<td>Norway (Default)</td>
</tr>
<tr>
<td>Spanish</td>
<td>Spain (Default)</td>
</tr>
</tbody>
</table>

Here are examples to illustrate this logic:

1. A Japanese-browser user will not see “Did you mean” suggestions regardless of the user’s location because Japanese is not a supported browser language.
2. A French-browser user in the United Kingdom will see the same suggestions as a French-browser user in France because only France is the supported user location in French.
3. An English-browser user in the United Kingdom may see slightly different English “did you mean” suggestions than an English-browser user in Australia because both user locations are supported in English.

Please note: Changing the language of the WorldCat Discovery interface from the footer will not cause “Did you mean” suggestions to stop appearing for an unsupported language.

Advanced Search is more accessible, defaults to three indexes and always uses parenthesis in each search box

The Advanced Search page is now clearer with labels for the Search Index, Search Term and Operator. Additionally, the previously inaccessible tool tip is removed in favor of database descriptions displayed by default.

Users who rely on Advanced Search to provide complex nested searches benefit with parenthesis around each search box added by default after the search is performed. An additional default index for Author adds to the three most commonly used indexes.
Users may limit their search using the pre-search filters located in the collapsed “Limit your search area.” This section also includes the option to group and ungroup editions and formats, and the “Search” and “Clear” buttons were moved to facilitate a smoother workflow from query to search:
OPAC real-time availability is faster and more reliable

Multiple technical enhancements occurred in September 2017 to help real-time availability from local OPAC’s perform faster and more reliably. Real-time availability now supports OPAC Boolean operations with metaprox and optimizes user cache to reduce resource use.

If you are a non-WorldShare Management library and you would like to confirm your OPAC configuration is optimized, please join us at the next WorldCat Discovery office hours.
New content

This is a list of new databases added to WorldCat Discovery, WorldCat Local and WorldCat.org since our last update.

You can enable these databases as search options in the Licensed Content and Databases module of the OCLC Service Configuration site. Please remember that your library must have a valid subscription to these databases in order to enable them.

The complete list of databases is available at http://www.oclc.org/content/dam/support/discovery/contentlisttargetID.xlsx

Available in WorldCat Discovery, WorldCat Local and WorldCat.org

The Bulletin from Accessible Archives Inc

The Bulletin is a collection of articles published by the senior chaplain’s office for the officers and men of the American embarkation center in the early 1900s.

The Camp Devens News from Accessible Archives Inc

Articles covering the experiences of American soldiers during the early 1900s at Camp Devens in Massachusetts. Also included are non-war related advertisements, poetry, short stories, memoirs, jokes, and cartoons.

The MacArthur Carry-On from Accessible Archives Inc

A weekly paper published in the early 1900s for Camp MacArthur in Texas. It covers experiences of American soldiers.

The Remonstrance from Accessible Archives Inc

The Remonstrance was the official publication of the Massachusetts Association Opposed to the Further Extension of Suffrage to Women. First published annually and later quarterly in Boston from February, 1890 until October, 1913, it provided a forum for women who opposed the expansion of voting rights to women.

The Western Woman Voter from Accessible Archives Inc

Established to serve all women voters throughout the western U.S., Western Woman Voter began publication following the passage of suffrage in Washington State.
Important Links

Office hours

- [http://www.oclc.org/support/services/discovery.en.html](http://www.oclc.org/support/services/discovery.en.html)

Product website

More product information can be found [here](http://www.oclc.org/support/services/discovery.en.html).

Support website(s)

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

- [WorldCat Discovery support resources](http://www.oclc.org/support/services/discovery.en.html)
- [WorldCat Discovery training](http://www.oclc.org/support/services/discovery.en.html)
- [Release notes](http://www.oclc.org/support/services/discovery.en.html)
- [OCLC customer support](http://www.oclc.org/support/services/discovery.en.html)
- [Browser compatibility chart](http://www.oclc.org/support/services/discovery.en.html)

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