WorldShare Record Manager release notes, March 2019

Release Date: March 26, 2019

Introduction

This release of WorldShare Record Manager provides the ability to edit your Local Bibliographic Data (LBD) records in bulk.

The release allows for bulk edit of the 500 and 590 fields in the LBD, for up to a maximum of 9,000 records at a time. Future releases will add functionality for editing additional LBD fields as well as Local Holdings Records.

Recommended actions

For this release, we recommend that you review the following checklists and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These checklists 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.

Administrative actions

These items require immediate action or decisions.

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<th>ACTION</th>
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<td>The initial release of bulk edit of local bibliographic data is now available to all users of Record Manager. 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 any user at your institution that has the Cataloging INST Admin role. For more information, see Cataloging roles.</td>
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Bulk edit of LBD records

Overview

Local bibliographic data (LBD) record work lists allow you to apply scripts to multiple records at a time. Work lists are
user-specific, and each Record Manager user can create and manage one work list at a time.

With LBD bulk edit functionality, you can:

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

**Search for LBD records and send to Record Work List**

Select the records you wish to edit using the My LBDs scope in the left panel. Check the boxes for the LBD records you want to work with 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.

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

To access your LBD record work list, navigate to Record Manager > Record Work Lists. Click the LBD tab. Select a script to add, delete, or replace text for a 500 or 590 field or subfield. Make selections for Field, Subfield, and Matching Options based on your needs.
Preview your changes

Go to Record Actions > View Records > Preview Records with Script Changes to preview up to 25 records at a time before applying your script.
Preview display

You can toggle from current record view to preview by clicking a single button. Preview display shows LBD after update, including any validation errors.
Current display

Current 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 **Record Actions > Edit**.
Confirm your edits

A confirmation dialog allows you to confirm the number of records that will be affected by the Edit process. Click the Apply button to initiate the process.
Script is applied

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. Click the Refresh button to view progress.
Completed summary

When processing is complete, a summary of the Edit activity is displayed. You must click Refresh to display the summary.
For additional information about this new functionality, please review the LBD Bulk Edit Documentation.

**Important links**

**Post release sessions**

To help you become familiar with the new features, enhancements and improvements included in this release, there is one update session scheduled. Please note the session time zones when registering. The sessions 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.

**WorldShare Management Services release update session**

Date: Wednesday, March 27, 2019

Time: 9:00 am Eastern Daylight Time (New York, GMT-04:00)

Registration: Use this link to register for the session.
Note: Please register even if you are unable to attend, so you will receive a link to the recorded session.

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