WorldShare Management Services Update

Jay Holloway
Product Manager,
Delivery Services
Our update today

- Patron Service: Engagement and Fulfillment
- Consortia and Collaboration Across Libraries
- Optimizing and Extending Resource Management
- WorldCat Discovery recent enhancements
- WorldCat Discovery upcoming enhancements
PATRON SERVICE: ENGAGEMENT AND FULFILLMENT
Available now: patron purchase requests

- **WMS libraries** can now add requests for items to be purchased to a queue.
- **Tipasa libraries** can take requests directly from patrons via Discovery.
- Staff decide whether to deny requests, send to Tipasa to borrow, or Acquisitions to purchase.
Tipasa – WorldShare Circulation integration

- ILL librarians will work in Tipasa
- Both supplying and lending libraries will see Tipasa activity reflected in Circulation
- NCIP messages will be sent into Circ
- Circulation staff and patrons will be able to see Tipasa transactions reflected in their local library account
License Manager Terms of Use

- Representing Terms of Use to patrons in Discovery or A-Z lists

![Cambridge Journals Online (Cambridge Core) Terms of Use](image)
Create a Custom Term
Search all Licenses containing specific Terms

Terms of Use Search

- Term of Use: Course Materials
- Encoded
- Terms Stated: Yes
- Course Materials Options: Select Option(s)
- Methods: Electronic course materials

Search (1 Results) Cancel Clear
Bulk Update Terms in all licenses
Wizard walks you through setting these Terms for public display.
Coming soon: integrated fulfillment

- Integration between Relais D2D and Circulation
- Shift unfilled requests from group circulation to ILL system
- Support multiple pickup locations for a branch
Also coming soon

Circulation worker role
• Limited view and edit privileges for patron information

Upgraded notification service
• Supports text notifications, customizable templates, patron format preference

Online payment of fines and fees
CONSORTIA AND COLLABORATION ACROSS LIBRARIES
Available now: consortium support

Analytics Group Administrator role
- Can create group-level reports in Circulation, Acquisitions, and E-resources domains

New Group Circulation reports
- Group Circulation Events Detail Report
- Group Open Hold Requests Report
- Group Overdue Items Report
- Group All Checked Out Items Report
Coming soon: consortium support

Multi-institution roles
- A single set of credentials will let you operate against any one of a group of libraries as a Cataloguer, Electronic Resources Librarian, KB Administrator, Circulation Desk Worker, etc.

Multiple library cards
- Patrons will be able to access their accounts to view checked out items, renew material, view and cancel holds etc. from a single set of credentials
Coming soon: consortium support

Shared Acquisitions
- Group voting on subscriptions and packages
- Member opt-in to group packages
- Group invoicing of individual members for shared subscriptions and purchases

Inherited roles and policies
- Allow templates to be defined for a group and inherited by all libraries within the group

Mask patron details at libraries other than home library
Coming soon: consortia enhancements

- Enhance holds transits and expiry for multiple libraries/branches
- Enhance SIP2 to support self-check stations across consortia
- Group administrators can run group reports in the Cataloging/Collection domain
- Group cataloging/collection reports:
  - Count of New and Removed Group Titles
  - Title Counts for Group Catalogue
  - Title Holdings Count by Institution
  - Titles Held by a Single Institution
Coming soon: collaboration across libraries

Report Designer

- Libraries will be able to share reports queries/templates from Report Designer with the rest of the Report Designer Community

- Your library will be able to pick up any of these templates and run them against your own data
OPTIMIZING AND EXTENDING RESOURCE MANAGEMENT
Available now: resource management

- Direct import of vendor files via FTP
- Split costs across funds
- Edit Invoice Total
- Collection Management functions on Digby mobile app
For libraries with License Manager: cost-per-use for collections
Resource Management: coming soon

- Edit Placed Order
- Title capture in License Manager
- Legal Deposit support
  - Including Receipt and claim notices
• Paperless pull lists
• Reshelving and “soft” check-in
• Check in/clear status
• Inventory
What’s next for Digby?

- Collection shifting
  - Bulk update of item location, status
  - Includes setting and clearing temporary locations

DEMONSTRATION

- Search Discovery
- ILL pull lists
- Weeding/deaccession pull lists
Bulk Patron Delete
Overview of bulk patron delete

• There is a delete file format and requirements for submitting a file of patron records to be deleted from WMS or Tipasa
• Matching for deleting patron records mirror the fields used for ongoing patron data loading
• Delete files will be submitted to a new file directory
• Bulk deletion of patron accounts can be sent ongoing i.e. end of semester for removing expired accounts
What does this mean for your library?

**ACTION REQUIRED**

- If you wish to remove patron records from WMS or Tipasa in bulk, you must use the new delete template (tab-delimited) or XML schema and submit a patron delete file for review to OCLC.

- If you wish to send ongoing patron data deletes, you can once you have an initial file reviewed and approved by OCLC.
LBD Bulk Edit Workflow
Search for LBD

- Fields and Pastures New: My First Year as a Country Vet
  - Control Number: 561657923
  - LSN: b2383982x
  - By John McCormack
  - Print book, English
  - ISBN: 0517566865
  - DLC, DLC | eng | Full, OCLC#: 32697750

- Pleasant Pastures [and other stories]: A Book for the Young
  - Control Number: 584140264
  - LSN: System Supplied@2018-08-27, 16:30:57
  - By Pastures
  - Print book, English
  - Publisher: Drummond's Tract Depot: Stirling, S.W. Partridge & Co.: London, [1910]
  - UKMGB, UKMGB | eng | Misc, OCLC#: 563787631

- The Pastures of Heaven
  - Control Number: 584140514
  - LSN: System Supplied@2018-08-27, 16:32:21
  - By John Steinbeck; James Nagel
  - Print book, English
  - ISBN: 0140187480
  - Series: Penguin breadloaf country classics
Select and send to work list

<table>
<thead>
<tr>
<th>LBD</th>
<th>Bibliographic Record Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image2.png" alt="Image" /></td>
<td><em>Pleasant Pastures [and other stories]. A book for the young.</em>&lt;br&gt;by PASTURES.&lt;br&gt;Print book, English&lt;br&gt;Publisher: Drummond's Tract Depot, Stirling, S.W. Partridge &amp; Co.: London, [1910]&lt;br&gt;UKMGB, UKMGB</td>
</tr>
</tbody>
</table>
Record work list – Select your script
Preview your changes
### Preview LBD Records - Records with Script Changes

**Control Number:** 561657923  
**LSN:** b2383962x

**Selected Script:** Replace Subfield in 500 or 590 Note Field  
**Selected Script Status:** Updated  
**Validation Errors:** 0

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDR</td>
<td>c</td>
<td></td>
<td></td>
</tr>
<tr>
<td>001</td>
<td></td>
<td>561657923</td>
<td></td>
</tr>
<tr>
<td>004</td>
<td></td>
<td>32697750</td>
<td></td>
</tr>
<tr>
<td>590</td>
<td></td>
<td>Franklin Thomas memorial collection.</td>
<td></td>
</tr>
</tbody>
</table>

**Control Number:** 584140264  
**LSN:** System.Supplied@2018-08-27,16:30:57

**Selected Script:** Replace Subfield in 500 or 590 Note Field  
**Selected Script Status:** Updated  
**Validation Errors:** 0

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDR</td>
<td>n</td>
<td></td>
<td></td>
</tr>
<tr>
<td>001</td>
<td></td>
<td>584140264</td>
<td></td>
</tr>
<tr>
<td>004</td>
<td></td>
<td>563787631</td>
<td></td>
</tr>
<tr>
<td>590</td>
<td></td>
<td>Franklin Thomas memorial collection.</td>
<td></td>
</tr>
</tbody>
</table>
Current display

View LBD Records - Current Records

Control Number: 561657923
LSN: b2383982x

Last Script Applied: None
Last Script Status: ✗ Not Started
Validation Errors: 0

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>561657923</td>
<td></td>
<td></td>
</tr>
<tr>
<td>004</td>
<td>32697750</td>
<td></td>
<td></td>
</tr>
<tr>
<td>590</td>
<td>Thomas Franklin memorial collection.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Control Number: 584140264
LSN: System.Supplied@2018-08-27,16:30:57

Last Script Applied: None
Last Script Status: ✗ Not Started
Validation Errors: 0

<table>
<thead>
<tr>
<th>Tag</th>
<th>Ind 1</th>
<th>Ind 2</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>LDR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>001</td>
<td>584140264</td>
<td></td>
<td></td>
</tr>
<tr>
<td>004</td>
<td>563787631</td>
<td></td>
<td></td>
</tr>
<tr>
<td>590</td>
<td>Thomas Franklin memorial collection.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Apply script

Record Work Lists

Bibliographic Records  LBD Records

LBD Records - Record Work List

Record Actions  Refresh
View Records (3)  Delete Records from List
Apply Script  Apply to Selected (3)
Clear All Check Box Selections  Apply to All (13)

Required Field

Script Name
Replace Subfield in 500 or 590 Note Field

Field
590

Subfield
$u - Local note

Matching Options
Contains
Capitlization

Find This Content
Thomas Franklin memorial collection.

Replace with This Content
If this field is blank, the content you entered in the Find This Content form field will be deleted.
Franklin Thomas memorial collection.
Confirm apply script

Apply LBD Script to Selected Record(s)

⚠️ You are about to apply the script to 3 LBD record(s) in the table.

Apply | Cancel
Progress summary

LBD Records - Record Work List

- **Record Actions**
- **Refresh**

**Applying the script to the records. Reference ID: BULKLD20180827114211.902EDT-HM3-JQRB-Z65.**
This page will be locked until the process has completed.

**Progress Summary**
Phase: PreProcessing  
Script Name: ReplaceSubfieldIn500Or590NoteField  
Total Records: 3  
Dropped: 0  
Not Processed: 0  
Failed: 0  
Updated: 0

* Required Field

Find and Select Script

* Script Name

Enter Script Name
Completed summary

Record Work Lists

Bibliographic Records  LBD Records

LBD Records - Record Work List

Record Actions  Refresh

See the record status to see if it was updated.

Summary

Started at 08/27/2018 4:45:25 PM
Completed at 08/27/2018 4:45:30 PM
Total Records Processed: 3 records
No Script Changes: 0 records
Updated: 3 records
Not Updated - Script Syntax Issue: 0 records
Not Updated - Script System Issue: 0 records
Not Updated - Validation Issue: 0 records
Not Updated - Record Not Found: 0 records
Not Updated - Permission Issue: 0 records
Not Updated - Unresolved Record Issue: 0 records
Not Updated - WorldCat Issue: 0 records
Record actions increased to 10,000 OCLC numbers
Additional Record Manager enhancements

- Search for Local Holdings Records using new options
- Bulk edit of Local Holdings Records
- Efficiently print labels for different materials and location
WORLDCAT DISCOVERY
UPDATES: RECENT
ENHANCEMENTS
Symphony no. 2; Merry waltz


Held by: UMKC Libraries

More Author / Title Information: Klemperer. Suite from the Threepenny Opera / Weill.

Language: No Linguistic Content

Publication: Audio disc : analog ; 33 1/3 rpm ; stereo ; 12 in.

Uniform Title: Symphonies W26 (Orchestral)

Subjects: Symphonies. Waltzes (Orchestral)

Performers: Philharmonia Orchestra · Otto Klemperer, conductor.


Database: WorldCat

Explore Editions and Formats

https://umkc.on.worldcat.org/oclc/17682619 2/14/2019
Editions and formats (Dec. 2018 release)
Print Availability on eMaterials

1. Global warming
   *by Brian Black, Gary J Weisel*

   [Print Book ©2010](#) | [Explore all editions & formats](#)

   This book takes one of the hot-button issues of our time and surveys it in historical context, creating a portrait of the multicentury shifts in thinking that have led to gradual acceptance... [Read More](#)

   Held by OCLC University

   ![View eBook](#)

   ✔ Available Main MAIN-STACKS 2010
Global warming
by Brian Black, Gary J Weisel

"Global Warming takes one of the hot-button issues of our time and surveys it in historical context, creating an intellectual portrait of the multi-century shifts in thinking that have... Read More

Held by OCLC University

View eBook
Global warming
by Brian Black, Gary J. Weisel

"Global Warming takes one of the hot-button issues of our time and surveys it in historical context, creating an intellectual portrait of the multi-century shifts in thinking that have... Read More

Held by OCLC University

View eBook

Print Book Available  Main MAIN-STACKS  2010
WORLDCAT DISCOVERY
UPCOMING ENHANCEMENTS
Display name subfields & true authority search

- Display subfields $b$, $c$, $d$, $k$ and $q$ in name headings, to allow for identification and differentiation of names. (S&DTF Report)
- Make the name search link in the search results screen just below the titles (Community Center Enhancement Request)
Display name subfields & true authority search

- Adams, John, $d 1947-

The John Adams earbox.

by John Adams, Charles Ives, San Francisco Symphony Orchestra, San Francisco Orchestre, Hallé Orchestra.

- Bede, $c the Venerable, Saint, $d 673-735

Ecclesiastical history of the English people : with Bede's letter to Egbert

by Bede the Venerable, Saint, David Hugh. Farmer, R. E. Latham, Egbert Saint, Cuthbert Abbot of Wearmouth.
Coming Soon – Display and Search name subfields

• Will display $b, $c, $d, $k, and $q by June 2019
• Will search over subfields with author link shortly after
Display & use 7xx title subfields

• When fields 700, 710, or 711 contain subfield $t, display all title-related subfields (currently $t, $k, $l, $m, $n, $o, $p, $r, $s), together with the name (all name-related subfields). (OCLC S&D TF report)

• When 7xx fields with subfield $t are present, display those fields as hyperlinks to searches on the name-title heading (Community Center Enhancement Request)
Sonatas (Violin and continuo)
Streaming audio.

Event notes:

Performer:
Emilio Percan, violin; G.A.P. Ensemble.

Database:
WorldCat

Added entry relationship:
Container of (work): Sonatas, Vivaldi, Antonio, RV 2,
Container of (work): Sonatas, Vivaldi, Antonio, RV 25,
Container of (work): Sonatas, Vivaldi, Antonio, RV 6,
Container of (work): Sonatas, Vivaldi, Antonio, RV 29,
Container of (work): Sonatas, Vivaldi, Antonio, RV 19,

700 1 2  Container of (work): a Vivaldi, Antonio, d 1678-1741, t Sonatas, m violin, continuo, n RV 2, r C major.
“Music” facet label
A&I Database recommendations

View articles in ATLA Religion Database with...

About 180,000 articles
Full-text religion and theology journal collection.

View articles in Health Source: Nursing/Acad...

About 2,000 articles
This resource provides nearly 550 scholarly full-text journals focusing on many medical disciplines.

View articles in Historical Abstracts

About 1,000 articles
This resource covers the history of the world (excluding the United States and Canada) from 1450 to the present.

View articles in PsycINFO

About 800 articles
Psychology and related fields since 1806

Search Tools

kw:(theology and culture)  10 results in Libraries Worldwide

Religion, culture and meaning-making coping: A study among cancer patients in Turkey.
by Fereshteh Ahmadi, Pelin Erbil, Nader Ahmadi, Onver A Catrez
Article 2018
Journal: Journal of Religion and Health 2018
User searches and clicks on first result

1. Introduction to algorithms
   by Thomas H Cormen
   eBook ©2009
   This edition has been revised and updated throughout. It includes some new chapters. It features improved treatment of dynamic programming and greedy algorithms as well as a new notion of ed... Read More

   Held by DePauw University Libraries
   View eBook

2. An introduction to genetic algorithms
   by Melanie Mitchell (Computer scientist)
   Print Book ©1996

   Held by DePauw University Libraries
   Available
OCLC Query Log

- Help us build the next phase of search relevance enhancements
- https://registration.oclc.org/reg/?pc=SearchQuery
Because what is known must be shared.
Thank you!

Jay Holloway
hollowaj@oclc.org

Because what is known must be shared.