WorldCat Discovery release notes, May 2020

Last updated: Mon, 04 Jan 2021 14:27:05 GMT

Release Date: May 28, 2020

Introduction

This release of WorldCat Discovery provides a number of new features and enhancements in addition to numerous bug fixes. These features will help you better configure the display of editions to meet local needs, including:

- Expanded option for configuring the grouping of editions in search results
- Edition availability for Levels 1 and Level 2 group holdings

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

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.

❏   Enable group related editions by default for each level unless your institution has unique workflows that require ungrouping of editions.

❏   Disable the default display of group variant records unless your library has unique workflows that require **ungrouped** variant records in search results.

❏   For WMS institutions: Enable edition availability.

❏   For WorldCat Discovery Premium institutions: Confirm that your local system can perform with added calls to availability.

❏   Register for a 2 June 2020 webinar overview of edition grouping enhancements. [Register now](#).

Administrative actions

These items require immediate action or decisions.

Enable group related editions.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

ACTION

Review grouping of edition choices and configurations with staff.

New features and enhancements

New options for grouping edition clusters in search results

New default grouping options for search results continue our focus on delivering an interface that is intuitive for end users and customizable for librarians. An enhanced ungrouped view of search results brings together variant records (records that are for the same edition but in a different language of cataloging, or an accidental duplicate that has not yet been merged) for a given edition to help users avoid these complexities while still providing a nuanced view of your library holdings. Libraries with more complex workflows that require navigation to a flat list (list with no grouping applied) may still enable the display of ungrouped search results. These new settings replace the previously available "Group related editions by default" setting. The defaults for this new configuration will match the settings your library has currently configured for "Group related editions by default":

- If you currently default to "Group related editions by default", the new settings will be grouped by default.
- If you currently default to "Ungroup related editions" the new settings will be ungrouped by default.

Details on how these settings work are included within these release notes. The following table provides a high-level overview of how the new settings will impact the display of brief search results:

GROUP RELATED EDITIONS ON BRIEF SEARCH RESULTS IS:	GROUP VARIANT RECORDS ON BRIEF SEARCH RESULTS IS:	DISPLAY ON BRIEF SEARCH RESULTS:	RECORDS ON BRIEF SEARCH RESULTS ARE GROUPED BY:
Enabled	Not configured to display	Refine This Search / Sort by / Best Match / Group related editions	One representative record for each work
Disabled	Not configured to display	Refine This Search / Sort by / Best Match / Group related editions	One representative record for each edition
Enabled	Enabled	Refine This Search / Sort by / Best Match / Group related editions / Group variant records	
Disabled	Disabled	Refine This Search / Sort by / Best Match / Group related editions / Group variant records	No grouping – Flat list of all items

Service Configuration: Defining default grouping

To control these new settings, navigate to worldcat.org/config > WorldCat Discovery and WorldCat Local > Search Settings and click on **Search Defaults. Under a new section titled "**Default Grouping" > Define how search results are grouped by default when initially displayed." You will see two options available:

- Group related editions for search results scoped to <Your Level 1, Level 2, and 3 groups> by default*
- Group related editions for search results scoped to libraries worldwide by default

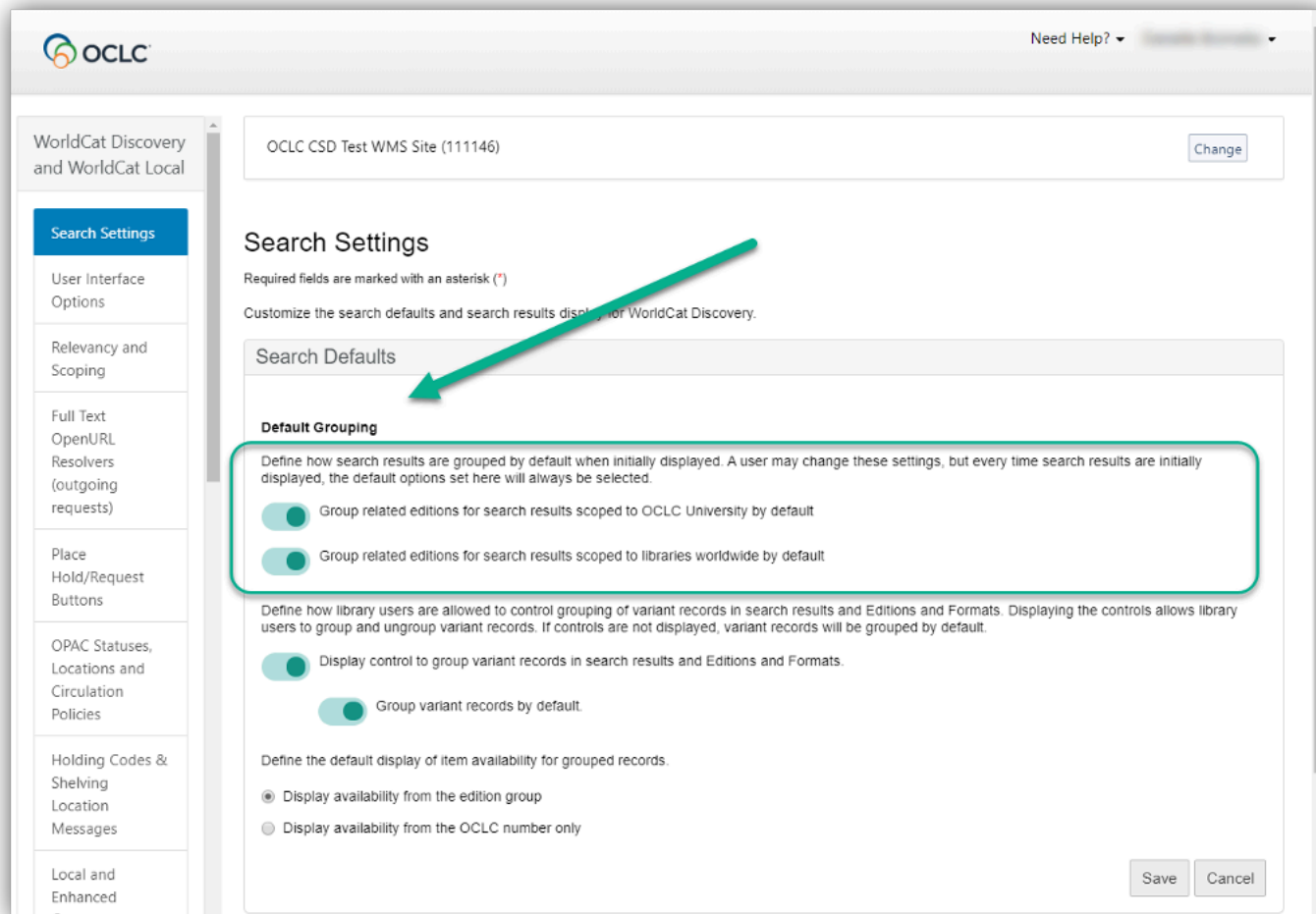When these settings are *enabled* users will continue to see search results grouped by work.

When these settings are *disabled* users will see a new view where search results are grouped by edition. This edition grouping will pull together records that are:

- WorkID (title, author, format)
- Language of publication
- Sub-format (where applicable, not all records have sub-format)

- Year of publication
- Publisher (first entry)

The two settings displayed in the image below will control how your users see the search results grouped by default.

*The first option "Group related editions for search results scoped to < Your Level 1, Level 2, and 3 groups > by default" will control the grouping algorithm when users are scoped to Levels 1-3 in WorldCat Discovery. Note: If you are not part of a group or groups, this setting will only apply to your institution.

WorldCat Discovery display: Default grouping

These new settings will correspond with the existing Group and Ungroup toggle and will change depending on service configuration settings and scoping selections made in the WorldCat Discovery interface as viewed in the image below.

Service Configuration: Defining default behavior when grouping is disabled

A flat view of search results may be useful to support unique workflows when users need to see each record displayed. You can enable a flat view of search results at worldcat.org/config > WorldCat Discovery and WorldCat Local > Search Settings >Search Defaults. Under the new section titled **"**Default Grouping > Define how library users are allowed to control grouping of variant records in search results and Editions and Formats" as shown in the image below.

The first is a setting that allows the display on WorldCat Discovery search results for users to either group or ungroup variant records (records that are for the same edition but in a different language of cataloging, or an accidental duplicate that has not yet been merged). This setting is called:

- Display control to group variant records in search results and Editions and Formats

When **enabled** users will see a corresponding toggle in WorldCat Discovery that allows them to navigate to the flat view in WorldCat Discovery search results.

When **disabled** users will not see a corresponding toggle in WorldCat Discovery to navigate to a flat view. When search results are ungrouped, users will not see the control to "Group variant records" and the ungrouped set of search results will always be grouped by edition.

The second setting in this section controls the default behavior of the Group Variant Record control on WorldCat Discovery search results. This setting lets you control whether users can choose a flat view of WorldCat Discovery search results or see the flat view by default. This setting is called:

- Group variant records by default

When *enabled* users viewing ungrouped search results will see the option for Group Variant records in WorldCat Discovery *enabled* by default. To see a flat view, users must choose to ungroup.

When *disabled* users viewing search results with Group related editions disabled will see the option for Group Variant records in WorldCat Discovery *disabled* by default.

WorldCat Discovery display: Group variant records

When enabled, the "Grouped variant records" setting appears on WorldCat Discovery search results when the Group related editions toggle is disabled as shown by the image below:

View all availability from the Edition cluster

For libraries that set holdings on records for different languages of cataloging for a given edition to support multilingual users, WorldCat Discovery will now enables configuration to display availability from the grouped edition cluster. This will make it easy for users to search for items in WorldCat Discovery, view a record in their preferred language, and ensure that availability displays no matter which edition record they are viewing. This new setting will look not only at the edition availability for items held at level one but will also look at group availability at level two to ensure availability is surfaced

for all items in the edition group. This configuration will work best for WMS institutions that have Local Holdings Records in WorldCat. Non-WMS institutions can enable this new setting; however, we recommend carefully monitoring availability performance and disabling this configuration if you find the system is unable to support additional availability calls. Users will be configured to display availability from the OCLC number only by default and will have to opt into this new availability setting.

Service Configuration: Defining default display of item availability for grouped records

To enable availability from the edition group, navigate to worldcat.org/config>WorldCat Discovery and WorldCat Local > Search Settings > Search Defaults and select the radio button "Display availability from the edition group" or "Display availability from the OCLC number only" depending on your library's preference.

WorldCat Discovery display: Group variant records

In the example image below, availability from the edition group has been selected. When viewing WorldCat Discovery in the preferred language of English, we see the bibliographic record display for the English Language of Cataloging and the availability from the edition cluster display.

Item availability from the edition cluster will display on brief search results and item details. When enabled, it will also display for group availability at level two as shown by this example:

Editions and formats display will reflect new edition grouping options

To help reduce the appearance of multiple records for the same edition in Editions and formats, WorldCat Discovery will display results in this section grouped by a user's search preference. This section will display one representative record for an edition when grouped by Work or Edition or will display a flat view of every record in the work set depending on a user's search filters. If a library has set holdings on more than one record in an edition cluster, the user's language of preference will be used to determine which edition record displays. See this table below for details:

Grouping Setting	Record Display in Editions and Formats

Group Related Editions	Group by Edition - One representative record for each edition
Ungroup Related Editions/Group Variant Records	Group by Edition - One representative record for each edition
Ungroup Related Editions/Ungroup Variant Records	No Grouping - Flat list of all items

Improved representative record logic to consider preferred language of cataloging

When holdings are set on more than one language of cataloging record for a given edition, WorldCat Discovery will now consider the language of cataloging that corresponds with the user's language preference as a determining factor for choosing the representative record. WorldCat Discovery will use the browser language or the language selected in the WorldCat Discovery interface to infer preferred language.

WorldCat Discovery will look at the following attributes in the order below to then choose a representative record for the edition group:

- 1st priority: Held by level 1 → Held by level 2 → Held by level 3
- 2nd priority: Language of cataloging matched from language of the user interface
- 3rd priority: Most widely held

WorldCat Discovery will look at the following criteria in the order below to choose a representative record for the work group:

- 1st priority: Held by level 1 → Held by level 2 → Held by level 3
- 2nd priority: Most recent
- 3rd priority: Language of cataloging matched from language of the user interface
- 4th priority: Most widely held

Bug fixes

Corrected display of fulfillment options for articles using the OPAC status grid

The logic display issue for article format types has been corrected when using the OPAC status and circulation grid to determine when to display fulfillment buttons. When a user is viewing an article record that is part of the central index and the record can be linked to the library's holding for the journal in WorldCat and there is no corresponding Local Holding Record OR item level record, then the article OPAC status and circulation grid will follow the logic for No location, No status.

De-duplication for Level 2 display for certain library configurations

This release corrects the previous duplicate availability display for non-WMS users. Prior to this release non-WMS WorldCat Discovery members with shared catalogs at their level 1 and level 2 group, with certain configurations within OCLC staff configuration modules saw duplicated availability display in their WorldCat Discovery item details display.

Improved advanced search load time when several hundred databases are configured

This release reduces the time required to load a large number of databases when navigating to the advanced search page. Prior to this release, institutions with several hundred databases configured for searching in their advanced search page were seeing slow load time when navigating to the advanced search page.

New Content

This is a list of new databases added to WorldCat Discovery 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 https://help.oclc.org/@api/deki/files/6370/contentlisttargetID.xlsx

Available in WorldCat Discovery and WorldCat.org

From Bloomsbury Publishing:

- **Bloomsbury Theology and Religion Online:** Contains resources designed for students and scholars of theology, biblical studies, religious studies, and related fields.

From IEEE Computer Society:

- **IEEE Computer Society Digital Library**: The IEEE Computer Society is the premier source for information, inspiration, and collaboration in computer science and engineering.

From Alexander Street:

- **Music Video Collection - Canada:** Contains important opera and classical music performances captured on video through staged productions, interviews, and documentaries.
- **Music Video Collection - China**: Contains important opera and classical music performances captured on video through staged   , interviews, and documentaries.
- **Music Video Collection – Outside North America**: Contains important opera and classical music performances captured on video through staged productions, interviews, and documentaries.
- **Music Video Collection – United States**: Contains important opera and classical music performances captured on video through staged productions, interviews, and documentaries.

Available in WorldCat Discovery

From Adam Matthew Digital:

- **Food and Drink in History:** From feast to famine, explore five centuries of primary source material documenting the story of food and drink.
- **Foreign Office Files for South East Asia, 1963-1980:** This collection offers an insight into the significant changes that took place in Southeast Asia during 1963-1980, including the creation of Malaysia and the response to this from the wider region.
- **Poverty, Philanthropy and Social Conditions in Victorian Britain:** This digital resource documents the interactions between government policy and public philanthropy in Victorian and Early twentieth-century society, tracing developments in welfare reform and the social tensions surrounding poverty.
- **Research Source: Women's Studies:** A breadth of printed and manuscript sources, providing a multitude of perspectives on the changing roles of women in history.
- **Research Source: World War Two Studies:** Important primary sources, offering insight into many aspects of the war, including government policy the war in the Pacific and the war in Europe.
- **Sex and Sexuality:** Explore changing attitudes towards human sexuality, gender and sexual behaviors in America and Beyond, throughout the 20th century.

Important links

Post release sessions

To help you become familiar with the new features, enhancements and improvements included in this release, there is a webinar overview session scheduled for Tuesday, June 2, 2020, 11:30 am Eastern Daylight Time (New York, GMT-04:00a0. 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. Register Now.

Support website(s)

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

- WorldCat Discovery
- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart

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

REL. 165.0-24

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