Display public notes in WorldCat Discovery about a resource's terms of use

Last updated: Tue, 11 Feb 2020 21:15:20 GMT

WorldShare License Manager libraries often wish to display a note to patrons about a resource's terms of use. Libraries can enter a public note in collection-level knowledge base settings. License Manager offers an automated method for updating and maintaining your knowledge base collection public notes.

About public notes and using a template in License Manager

Within knowledge base collections in Collection Manager, you can open a collection and put a public note in the collection-level settings. That note will display to patrons in the Discovery interface. Libraries that output MARC records can map public notes to their records so that public notes will display in their OPAC. Find more information about collection-level settings in knowledge base collections including public and staff notes.

The patron-facing notes that libraries want to display in their discovery interface are often associated with a resource's licensing and terms of use. See the table for examples.

<table>
<thead>
<tr>
<th>EXAMPLE LICENSE TERM OF USE</th>
<th>EXAMPLE OF AN ASSOCIATED PUBLIC NOTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concurrent Users</td>
<td>Maximum number of concurrent users: 5</td>
</tr>
<tr>
<td>Copying and Sharing</td>
<td>Types of copying permitted: Digital, print, academic purposes</td>
</tr>
</tbody>
</table>

License Manager gives you the option to create a template to manage collection-level notes in an automated way. Use the instructions on this page to complete a 3-step process to create a template to manage public notes. Once you apply the template to your collections, the actual display of the public note depends on the content of each license. You can edit the template to maintain notes across your licenses and collections.

What happens to notes in collection-level knowledge base settings?

If you currently have public notes in collection-level knowledge base settings, you can maintain them by selecting Protect existing content in collection-level public notes in the public notes display wizard. This allows you to determine whether you want retain existing content or overwrite the existing content with the proposed content in the Collections With Existing Content tab.

How to create a template using the wizard in License Manager
1. **Create Template for Public Notes Display for Collections**

Create a template for how your public notes will be displayed. Actual display depends on content of each license. This template only applies to your selected collections.

Note: A collection public note has a limit of 1,024 characters.

1. Expand Licenses and click **Public Notes Display**.
2. From the public notes display wizard, select the Details text field.
3. Enter your desired public note text (e.g., policies, important information, links to surveys, etc.) in the Details text field.
4. From the Include column, select any additional license terms you want to add to your public note.
5. Click **Continue**.

2. **Choose Display Order**

1. Use the arrows to determine the order in which the public notes display.
2. Click **Continue**.

3. **Existing Public Note**

1. Select how you want your Existing Public Notes Content to be handled.
   a. **Overwrite all public notes (this cannot be undone.)**
   b. **Protect existing content in collection-level public notes**
2. The Example Display for Public Notes field displays the public note output as if your licenses were each to have all the indicated terms associated with the license. If you want to change the terms included and/or order of the terms included, click the **Back** button.
   Note: The template result will only display those terms associated within each license.
3. Click **Apply Changes** to approve the public note. License Manager will begin analyzing all your licenses and their associated collections. The criteria used will be whether the license is currently active and also whether the collection found is on only a single license or multiple licenses. The Public Notes Display Template screen displays one of the following statuses:
   Note: Click **Refresh** to update the status.
   - **Processing collections**
     Results will be available momentarily.
   - **Success**
     Public notes were updated for [number] collections.

**Public Notes Display Template screen**

After you create a template, you will see the following three accordions.
Public Notes Template

The Public Notes Template accordion displays the most recent template created and applied to your licenses.

Collections Affected by Template

The Collections Affected by Template accordion displays the most recent edits applied to your licensed collections.

Note: Public notes text listed under this accordion do not reflect any subsequent Collection Manager updates since applying the template.

About columns in Collections Affected by Template - Table

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DESCRIPTION</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections Displaying Public Notes</td>
<td>Click a <strong>collection</strong> to be taken to the Collection Manager interface where you can manually edit collection details.</td>
<td>This column can be sorted (A to Z; Z to A)</td>
</tr>
<tr>
<td>License</td>
<td>Click <strong>View license</strong> to view the license where the indicated collection is associated.</td>
<td></td>
</tr>
<tr>
<td>Public Notes Template Update</td>
<td>Click <strong>View public notes text</strong> to view the terms of use applied to a given collection. License Manager analyzes each license and only appends the terms of use in play for a given license.</td>
<td>The descriptive text is applied to all collections.</td>
</tr>
</tbody>
</table>

Collections Not Affected by Template

The Collections Not Affected by Template accordion displays collections that were not affected by the most recent template write action. It contains two tabs: Collections in More Than One License and Collections With Existing Content.

Collections in More Than One License tab

The Collections in More Than One License tab displays those collections where a single license could not be found. You will need to assign notes to which ever license takes precedence.

1. Click **View license**.
2. Locate a license to which you want to apply a public note and click its **License Name**.
3. Expand the Collections accordion.
4. From the Existing Public Note Content, click **View public notes text** to view the current public note for a
collection.

5. Select the collection(s) to which you would like to replace the current public note with the public note template and click **Update Public Notes**.

6. Repeat steps 2-5 for other licenses within a collection that you would like to review.

7. Repeat steps 1-6 for other licenses in the Collections in More Than One License tab.

Note: These collections do not display public notes from the template you created because the collections appear in more than one license and collection level public notes could differ. In order to show template-driven public notes, ensure that collections are attached to only one license.

**About columns in Collections in More than One License - Table**

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DESCRIPTION</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections In More Than One License</td>
<td>Click a collection to be taken to the Collection Manager interface where you can manually edit collection details.</td>
<td>This column can be sorted (A to Z; Z to A)</td>
</tr>
<tr>
<td>License</td>
<td>Click View license to view all licenses that contain the indicated collection. You can then apply the template from that one license, thereby assuring the collection has the proper term notes.</td>
<td></td>
</tr>
<tr>
<td>Existing Public Note Content</td>
<td>Click View public notes text to view the terms of use applied to a given collection. License Manager analyzes each license and only appends the terms of use in play for a given license.</td>
<td>The descriptive text is applied to all collections.</td>
</tr>
</tbody>
</table>

**Collections With Existing Content tab**

The Collections With Existing Content tab displays collections that were not affected by the template because the option to “Protect existing content in collection-level public notes” was selected. You will need to determine whether you want to retain existing content or overwrite the existing content with the proposed content.

1. Click **View public notes text** to view the terms of use currently applied to a given collection.
2. Click **View template text** to view the proposed terms of use for a given collection.
3. Select the collection(s) where proposed content is preferred to the existing content and then click **Overwrite with Template Content**.
4. Click **Overwrite** in the Overwrite with Template Content dialog to confirm.

Note: These collections do not display public notes from the template you created because they have existing content in
the collection level public notes. If you choose to override the public notes using the template content, the existing public notes will be replaced. It cannot be undone.

**About columns in Collections With Existing Content tab - Table**

<table>
<thead>
<tr>
<th>COLUMN NAME</th>
<th>DESCRIPTION</th>
<th>NOTES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collections Names</td>
<td>Click a <strong>collection</strong> to be taken to the Collection Manager interface where you can manually edit collection details.</td>
<td>This column can be sorted (A to Z; Z to A)</td>
</tr>
<tr>
<td>License</td>
<td>Click <strong>View license</strong> to view all licenses that contain the indicated collection. You can then apply the template from that one license, thereby assuring the collection has the proper term notes.</td>
<td></td>
</tr>
<tr>
<td>Existing Public Note Content</td>
<td>Click <strong>View public notes text</strong> to view the terms of use applied to a given collection. License Manager analyzes each license and only appends the terms of use in play for a given license.</td>
<td>The descriptive text is applied to all collections.</td>
</tr>
<tr>
<td>Proposed Template Content</td>
<td>Click <strong>View template text</strong> to view the proposed terms of use for a given collection.</td>
<td>If the proposed text is preferred to the existing text, select the row(s) you want to overwrite and then click <strong>Overwrite with Template Content</strong>.</td>
</tr>
</tbody>
</table>

**How to edit and maintain public notes**

**Edit public notes across collections**

You can edit public notes across collections with the public notes display wizard.

1. Expand Licenses and click **Public Notes Display**.
2. Click **Apply Template**.
3. From the public notes display wizard, select/add additional public notes or deselect existing public notes and then click **Continue**.
4. Use the up and down arrows to rearrange the order in which public notes display and then click **Continue**.
5. **(Optional)**. Edit how you want your Existing Public Notes Content to be handled and preview your edited public note.
6. Click **Apply Changes**. License Manager will begin analyzing all your licenses and their associated collections. The
criteria used will be whether the license is currently active and also whether the collection found is on only a single license or multiple licenses. The Public Notes Display Template screen displays one of the following statuses:

Note: Click Refresh to update the status.

- **Processing collections**
  Results will be available momentarily.

- **Success**
  Public notes were updated for [number] collections.

**Edit public notes license-by-license**

You can edit public notes for a specific license.

1. Expand Licenses and click **Public Notes Display**.
2. Expand the Collections Affected by Template accordion.
3. Click **View license** to view the license where the indicated collection is associated.
4. Click a **License Name**.
5. Expand the Collections accordion.
6. Select the collection(s) to which you would like to replace the current public note with the public note template and click **Update Public Notes**.
7. From the public notes display wizard, select/add additional public notes or deselect existing public notes and then click **Continue**.
8. Use the up and down arrows to rearrange the order in which public notes display and then click **Continue**.
9. (Optional). Edit how you want your Existing Public Notes Content to be handled and preview your edited public note.
10. Click **Apply Changes**. License Manager will begin analyzing all your licenses and their associated collections. The criteria used will be whether the license is currently active and also whether the collection found is on only a single license or multiple licenses. The Public Notes Display Template screen displays one of the following statuses:

Note: Click Refresh to update the status.

- **Processing collections**
  Results will be available momentarily.

- **Success**
  Public notes were updated for [number] collections.

**Update public notes across collections**

If you add a new item to your public notes template, or if you have acquired new licenses but haven't run the public notes template, you can update public notes across all of your collections.

1. Expand Licenses and click **Public Notes Display**.
2. Verify that the text in the Public Notes Template accordion is relevant. Note: You can edit the public note if something has changed.
3. Click **Apply Template**.
4. From the public notes display wizard, click **Continue > Continue > Apply Changes**. License Manager will begin analyzing all your licenses and their associated collections. The criteria used will be whether the license is currently active and also whether the collection found is on only a single license or multiple licenses. The Public
Notes Display Template screen displays one of the following statuses:

Note: Click Refresh to update the status.

- **Processing collections**
  Results will be available momentarily.

- **Success**
  Public notes were updated for [number] collections.