WorldShare Record Manager release notes, September 2018

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Introduction

This release of WorldShare Management Services Record Manager provides five enhancements, in addition to five bug fixes. These features:

- New Preferences for Label Types and Improved Work Area in Label Lists
- Limit increased to 10,000 to set and delete holdings in Record Work Lists
- Ability to Add a Privacy Notice for Staff and Patrons
- New Authority Workflows to Create and Maintain Library of Congress and Canadiana Name Authorities in French Authority Records

These enhancements are the direct result of your feedback.

New features and enhancements

New Preferences for Label Types and Improved Work Area in Label Lists

The functionality for creating labels has been extended and the preferences for this have been renamed to “Working with Labels”.

You can now create more than one label type and have a list of label types to choose from. Define your default label type by clicking the Default radio button.

Note: This can only be changed if no labels have been added to a list yet, otherwise the Default radio button is disabled.
You can now create a new label type as needed. Go to the "Working with Labels" panel in the Preferences section and click on "Create Label Type".

Enter a name for the new label type you wish to add and fill in the properties fields.
Note: Only the Label Type Name is a mandatory field.
Note: Currently the only Font Name and Size are Courier New and 12. You will be able to select from more options in a future release.

**Working with Label Print Lists**

When you're working in a Label Print List, you now see two different tabs that you can work with:

- The **Records** area where all records that were added to the label print list are listed.
- The **Layout** area where you can preview how the labels will look and make additional edits.
Hovering over a label makes an edit button appear; clicking that button makes the label editable and you can proceed with your edits:
You will be able to select from more editing options in a future release.

**Limit increased to 10,000 to set and delete holdings in Record Work Lists**

In the Bibliographic Records - Record Work List, you can set and delete WorldCat holdings for a list of records. The maximum number of records that can be entered, which was previously 50, has been increased to 10,000. The maximum number of records that can be processed at one time is 1,000.

Type or paste a list of OCLC numbers into the text box. Separate the numbers with a space.

As soon as one or multiple OCLC numbers have been entered in the input box, the Record Actions drop-down menu above the input box becomes active. The Record Actions drop-down menu contains the following options:

- Delete WorldCat Holding(s)
  - Delete Holding(s) Only
  - Delete Holding(s), LBD(s), LHR(s)
- Set WorldCat Holding(s)
If you've entered duplicate OCLC numbers, the system automatically removes them when you click outside the input box. You'll see a message telling you that x duplicate record number(s) were removed.

Select the action you wish to run, and you'll be prompted with a dialog where you either confirm or cancel.

If you've entered more than 1,000 OCLC numbers, you'll see a confirmation dialog telling you that you're about to process a maximum of 1,000 records and that the remaining records will be retained in the input box.
After confirming and thereby starting the action, you'll see an information window monitoring the file processing. The progress bar indicates how many records have already been processed. The dialog closes after processing is complete.

In the case that you've entered more than 10,000 OCLC numbers, the remaining records are retained in the input box; you can now run the same action again if needed:
After processing of the record is complete, you'll see success and/or error messages. It is possible that a number of records can be processed while other cannot. The records that could not be processed are shown in an error table below the input box.

Ability to Add a Privacy Notice for Staff and Patrons

Institution administrators can now request OCLC to add an institution-defined privacy notice to the staff and patron login step for many OCLC services including WorldShare. One message covers all WorldShare applications.
If you add a privacy notice, it will be displayed before the staff or patron is presented with their login screen. The number of times the privacy notice is displayed is based on the timeframe configured for the institution.

To request the addition of a privacy notice for your institution, please contact OCLC Support in your region.

To illustrate an example, below are three screenshots that show the sequence for displaying the privacy notice. Once you login, you are presented with the privacy notice. Once you click 'Continue' or if 'Continue' is not selected after 40 seconds have passed, then you progress to your application.

Log in

Privacy notice appears. Your institution will supply the text for the privacy notice. Remember that it must be generic enough to cover all WorldShare applications.
You progress to your application once you click 'Continue' or if 'Continue' is not selected after 40 seconds have passed.

New Authority Workflows to Create and Maintain Library of Congress and Canadiana Name Authorities in French Authority Records

The new features for creating and working with Library of Congress and Canadiana Name Authorities in French
authority records are now fully available. These features were highlighted in the July release notes when they first appeared in the Record Manager application. Please see the July release notes for details.

Creating and updating Library of Congress name authority records requires you to have the AUTHORITIES_LC_NACO_NAME_AUTHORITY_FILE role assigned in Record Manager. The Cataloging Administrator at your institution can assign the role. For more information about the roles, see Record Manager account roles.

**Bug fixes**

**URIs for LC and MeSH Headings Have .html File Extension Included for Export**

We fixed an issue where the .html file extension was in records when URIs for LC and MeSH headings were sent out via export.

**Before fix**

```
100 1\$aTolstoy, Leo,$cgraf,$d1828-1910.$0http://id.loc.gov/authorities/names/n79068416.html
```

**After fix**

```
100 1\$aTolstoy, Leo,$cgraf,$d1828-1910.$0http://id.loc.gov/authorities/names/n79068416
```

**Navigation to LC Browse Results Goes to Wrong Page**

We fixed an issue where navigating between screens in Library of Congress browse lists sent you to the wrong screen. Now, when you do a simple browse followed immediately by a root and expanded browse, then click on the browse link in the header above the results list, you are taken to the correct page of results.

**After fix**

Do an LC browse
Do an LC root/expanded browse and click on LC Browse List: Root: united states link above the list.

You are taken back to the correct list.

Before the fix, the first browse list was redisplayed.
Indexes Missing from Canadiana Drop-Down List

You can now see two Canadiana authority file indexes that were previously not included in the drop-down list in the left panel.

- Linking Entry: Corporate/Conference Name (lcn:)
- Linking Entry: Geographic Name (lge:)

WorldShare Management Libraries 852 $b Holding Library Code Selection Not from Service Configuration

The Holding Library code list for WorldShare Management System libraries in 852 $b of local holdings records is now displaying the Holding library codes and code names that are listed in Service Configuration.

Wrong Page Displayed from Authority Results List

An issue that caused the wrong page in the authority results list to be displayed from tab on left panel is fixed.

If you get a hit list with multiple pages and open a record from a page beyond page one, open a record from that page, then use the tab for the search in the left panel to return to the list, you are returned to the page from which you opened the record. Before the fix you were returned to the first page in the results list.

Perform an authority file search in any authority file.
Go to the third page of the results list.

Click a link to open a record, then click on the search tab in the left panel.

You are returned to the third page of the search results.
Important links

Pre-Release Recording

A pre-release recording was made on September 6, 2018 to help users become familiar with the new features, enhancements and improvements included in this release. The session was recorded and archived for future viewing on the OCLC Community Center.

Pre-Release Recording

Date: September 6, 2018

The recording is available here.

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 Record Manager
- OCLC Community Center
- Browser compatibility chart