WorldShare Record Manager release notes, December 2018

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Release Date: December 8, 2018

Introduction

This release of WorldShare Record Manager provides new features and enhancements. These features include:

- Additional indexes added to local holdings record searches
- Enhancements to the local holdings records result list
- A link to WorldCat Discovery from bibliographic and local holdings records
- New preferences for local holdings records and labels

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

New features and enhancements

Local holdings record enhancements

Additional indexes

The list of indexes for searching local holdings records has been extended. The new list shows up under Data Type “Local Holdings Records” and scope “My LHRs”: 
When selecting some of these indexes additional sub-selections will be offered, e.g. when selecting “Location” you’ll see a dropdown listing the available branches as well as an additional dropdown for the shelving locations of the selected branch:
The first branch/shelving location in the list is always pre-selected. By unchecking the selected branch/shelving location you can empty the input box.

Locations can be also be typed in manually; this might be required if you know that you’ve entered an invalid location in the LHR editor that has e.g. typos and you can’t select it from the drop-down list:

Some indexes (e.g., the Lending Policy index) have a single selection list and content in the respective fields is coded content only. Select the values you wish to search for from the dropdown:
Local holdings record result list enhancements

The result list for local holdings records has been modified to have separate columns for each content type.

New layout for Actions

Actions that were previously displayed as individual buttons have now been moved under the Actions menu. They become active as soon as one or more records have been selected and the total number of records selected is <100.

Note: If you selected more than 100 results from the list the actions become inactive; in this case narrow down your results by filtering the result list.
Note: The Delete Barcodes option is only active if the search result you’re currently working on is based on a barcode search.

Filtering of results

In order to narrow down your LHR result lists you can apply filters. Add a maximum of 5 filters to narrow down your result list by clicking on the add button (➕), or remove lines by using the remove button (➖).

Multiple filters can be linked with Boolean operators AND, OR, NOT.

Again, when selecting filters you’ll see additional dropdown lists to select values from.
Undo your filtering and go back to the initial result list by clicking on the Reset link.

LHR list for one bibliographic record

The layout for a list of LHRs under the Title Set: has been adjusted corresponding to the LHR search result list:

Link to Discovery from the Record Manager records

Users can view the record they’re currently working on in Discovery to see the end-user view of the record.
This feature is available:

- In the full bibliographic record view in both the MARC21 view and the text-view mode by clicking on the “View in Discovery” link under the Record menu:

- When working in Acquisitions or Circulation or when viewing the Details page there’s also a clickable link “View Record in Discovery”:
- In the Record Manager LHR editor by clicking on the "View in Discovery" link under the Record menu:

Clicking the link from either location takes you to the full record in Discovery:
Updates to Record Manager Preferences

New preferences for LHRs have been implemented

You can customize if the 852 $t subfield (=copy number) should show up in LHR results and -if yes- what the prefix should be like by enabling the checkbox for “Display 852 $t information in search results” and add a prefix if needed:

As the list of LHR indexes has been significantly extended you can now customize the list of LHR indexes to select from and in which order you want the indexes to appear: enable/disable indexes and move them up or down using the arrows in the leftmost column. Define also the index you want to be your Default.
New Working with Labels preferences
The ability to create a new label type was already installed with the September 29th version:
Configure the properties for the new label type:
With the new RM release the **Label Setup** area allows a detailed configuration of label list: you can define the order of the various elements of a label such as e.g. stamps, the data, blank lines as well as font, size, style and alignment of the content.

The label elements display in the printable area; in case you added too many lines for the selected label type and they...
exceed the size of the actual label they’ll be moved into the non-printable area and you might have to adjust the layout:

Label Print List

Looking at the Label Print List under “Export and Label Print Lists” in the left panel shows the labels that have been added to the list in the selected layout:
You can select an individual label in the list and click the Edit button:
The label editor shows the selected label in the Edit Label table. You can now change the content of the label as well as the layout.

If you add more blank lines then are on the label (according to its size), some lines will move in to the non-printable area.
If you don’t want to keep the changes you made, click on the Reset button to undo them:

Extended length of the Description field

When editing items, you can add a Description in a bigger field now.
Selected index stays if scope changed

If an index was selected in one scope and then the scope was changed, the index selected previously is still selected.
Selected branch when starting WorldShare is the preselected holding location for creating new LHRs

The Holding Location that has been selected upon logon is preselected and displayed in the Holding Location box for Add item, Add Copy, and Add Multipart Set.
Bug fixes

Authority record 5xx and 7xx links clickable in Internet Explorer 11

When a 5xx or 7xx authority record link is clicked in a bibliographic record, the authority record link opens in a pop-up window. Previously, authority record links did not open in Internet Explorer 11.

Authority record editor menu is visible in Internet Explorer 11

When an authority record has a status of "Queued for Contribution", the authority record editor is visible. Previously, the menu was not visible when using Internet Explorer 11.

Duplicate labels appearing on label print list

When sending labels to the label print list, the label will not duplicate on the list. Previously, duplicate labels would appear on the print label list intermittently and a refresh was needed to remove the duplicate label.

Field 245 retains capital letters when a bibliographic record is derived electronically

When a bibliographic record is derived using the Derive Electronic Record action, capital letters are retained in field 245 $c. Previously, capital letters in field 245 $c were converted to lowercase when the record was derived.

Important links

Post-release overview session

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

Date: Tuesday, December 11, 2018

Time: 9:00 am, Eastern Standard Time (New York, GMT-05:00)

Registration: Use this link to register for the Webinar session.

Virtual AskQC office hours

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