WorldShare Record Manager release notes, May 2019

Release Date: May 18, 2019

Introduction

This release of WorldShare Record Manager provides new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- View bibliographic records side-by-side
- Delete Shared Print Holding Type Flag and Retention Statement from a LHR
- New indexes for searching Shared Print records
- Added index to All WorldCat - Browse for Canadian Class Number
- Label editing improvements (smaller font sizes for label printing, label line spacing, added call number prefix and suffix as content types, edit labels in an label text box, ability to move label rows, save or reset changes for multiple labels in one step)
- Timestamp check in the MARC21 LHR editor
- Dropdown list for temporary shelving locations (876 $l)
- Renamed "Preferences" to "User Preferences"
- Bug fixes: Delete button missing for multipart and serial items, Canadiana Authority Record Saved – In Progress issues, cases of duplicate WorldCat records created, copy number for LHRs not displaying in LHR list, Location and Temporary Shelving Location dropdowns missing from WorldShare Circulation or WorldShare Acquisitions, closed search tabs in Record Manager reopening, several facets renamed to user friendly name

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.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.
Update label type(s) within User Preferences - Working with Labels to include prefix and suffix data from the 852 $k and 852 $m for label printing.

Update label type(s) within User Preferences - Working with Labels to include line spacing for label printing.

New features and enhancements

View bibliographic records side-by-side

Two bibliographic records can be compared side-by-side, e.g. if you want to see if there are differences between the records to determine which record you should set your holdings on.

When you're viewing a bibliographic record in the MARC21 editor expand the Record menu and click on "Compare".
A dialog opens where you can type in the OCLC number of another record you want to compare with.

OR click on Find and Select Record if you need to search for the record to be compared.
Enter your search query, click on Search and select a record from the result list.

After selecting a record the two bibliographic records display side-by-side, fields are aligned and can be directly compared.
If you want to change the compared record click on the Select New Compared Record button above the record display.

**Remove Shared Print flag and retention statement from a Local Holdings Record**

For libraries participating in the [Shared Print Registration Service](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_...), you can remove the Shared Print holding type flag and retention statement from a Local Holdings Record.

The Shared Print flag and retention statement can be removed from a LHR for titles that you are no longer committing to retain but you are keeping the title in your collection. Libraries using WorldShare Management Services or libraries capturing holdings information in LHRs for Interlibrary Loan purposes may wish to use this option if they are no longer...
committing to retain a title.

Open the LHR editor and click Remove Shared Print Commitment (disabled if there isn't an existing Shared Print flag and 583 field).

A dialog opens confirming you would like to remove the shared print commitment.

Clicking Remove deletes the 583 field(s).
Click Save to complete the removal of the Shared Print flag.

See Known Issues section for an issue found during this release related to this feature.

New indexes for searching Shared Print records

Two new indexes have been created to allow searching for bibliographic records for libraries that are participating in the Shared Print Registration Service.

The indexes are:

- Shared Print Institution (sh:) for Shared Print records held by my institution (system checks for bibliographic records at your institution with an associated LHR containing a Shared Print holding type flag)
Shared Print Group (sg:) for Shared Print records held by libraries in a group (system checks for bibliographic records with the presence of local holdings of libraries within a specified, profiled group)

The indexes appear in the index dropdown list under Advanced Search and can also be used for an expert search query.

**Added index to All WorldCat - Browse for Canadian Class Number**

A new index, Canadian Class Number, was added to the list of browse indexes.

Select data type Bibliographic Records and scope to WorldCat - Browse; in the expanded index dropdown list you'll see the index Canadian Class Number.

**Label Editing Improvements**

**Smaller Font Sizes**

Additional smaller font sizes (2, 4, 6) have been added to the Size dropdown in the Label Setup table as well as in the Edit Label Content table in the Label Editor.

![Label Setup Table](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_/…)

**Label Line Spacing**

A line spacing feature in the user preferences will allow you to set the spacing for text in your labels using the "point" unit of measurement. As you make your selection the Label Setup table reflects the spacing and you will clearly see when a row moves into the non-printable section.

To add line spacing to your existing label types you will need to update under User Preferences - Working with Labels as the default in use is 0 pt. (= no line spacing).
### Label Settings

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Inches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Height</td>
<td>2.00</td>
<td></td>
</tr>
<tr>
<td>Width</td>
<td>1.00</td>
<td></td>
</tr>
<tr>
<td>Left Margin</td>
<td>0.05</td>
<td></td>
</tr>
<tr>
<td>Top Margin</td>
<td>0.10</td>
<td></td>
</tr>
<tr>
<td>Right Margin</td>
<td>0.05</td>
<td></td>
</tr>
<tr>
<td>Bottom Margin</td>
<td>0.10</td>
<td></td>
</tr>
</tbody>
</table>

**Line Spacing**

- 0 pt
- 1 pt
- 2 pt
- 3 pt
- 4 pt
- 5 pt
- 6 pt
- 7 pt
- 8 pt
- 9 pt
- 10 pt
- 11 pt
- 12 pt
- 13 pt
- 14 pt
- 15 pt
- 16 pt
- 17 pt
- 18 pt

**Copy Number Prefix**

- (e.g., copy, or copy number)

**Automatic Stamps**

- Stamp 1
- Stamp 2

**Label Setup**

<table>
<thead>
<tr>
<th>Line</th>
<th>Cc</th>
<th>Font</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
</tr>
<tr>
<td>2</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
</tr>
</tbody>
</table>

Example of line spacing applied to a label:
### Call Number Prefix and Suffix as Content Types

The call number prefix (852 $k) and suffix (852 $m) are no longer tied to the stamp content type but are now represented as separate content types in User Preferences - Working with Labels.

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>PN</td>
<td>PN</td>
<td>PN</td>
<td>PN</td>
<td>PZ</td>
</tr>
<tr>
<td>1995.9</td>
<td>1995.9</td>
<td>1995.9</td>
<td>1995.9</td>
<td>7</td>
</tr>
<tr>
<td>P674</td>
<td>P674</td>
<td>P674</td>
<td>P674</td>
<td>Ham</td>
</tr>
<tr>
<td>9</td>
<td>10</td>
<td>11</td>
<td>12</td>
<td>13</td>
</tr>
<tr>
<td>525.14</td>
<td>652.07</td>
<td>652.07</td>
<td>652.07</td>
<td>652.07</td>
</tr>
<tr>
<td>F5423</td>
<td>L221</td>
<td>L221</td>
<td>L221</td>
<td>L221</td>
</tr>
</tbody>
</table>
You must update the Label Setup in your preferences if you want to use prefix/suffix separately from stamps.

<table>
<thead>
<tr>
<th>Line</th>
<th>Content</th>
<th>Font</th>
<th>Size</th>
<th>Style</th>
<th>Alignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Blank Line/Free Text</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>2</td>
<td>Prefix</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>3</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>4</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>5</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>6</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>7</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>8</td>
<td>Data</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>9</td>
<td>Suffix</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
<tr>
<td>10</td>
<td>Copy Number</td>
<td>Courier New</td>
<td>12</td>
<td>Regular</td>
<td>Left</td>
</tr>
</tbody>
</table>

If 852 $k$ or $m$ are not in all labels on your label print list blank lines will no longer appear in your label print list as was the case previously with the stamp content type.

**Example:** The third call number in the below list does not contain prefix and suffix in the 852 field and no blank lines appear on the label.
Some **background** information about stamp and prefix/suffix content type behavior:

- Stamp 1 and Stamp 2 can be used in conjunction with the new prefix and suffix content type or used separately
- Stamps should be considered as customizable lines of text that apply to the entire label page
• Review your user preferences and update settings to your specific needs
• If you have questions, please contact OCLC Support for assistance.

**Edit Labels in a Label Text Box**

You can now edit labels quickly and efficiently directly in a text box that accommodates direct edits instead of using the Edit Label Content table.

The Edit Label Text box will reflect text only; the font, size, styling and alignment of the labels will display in the Preview Label box.

**Move Label Rows**

If you want to change the order of rows within a label you can now move the label rows up or down easily using the
arrows in the leftmost column.

Save or Reset Changes for Multiple Labels

You can now save multiple edits made to labels at once. The Saved Changed Labels option provides the count of how many labels have had edits made and will save all the changes at once.

Edits can be made to 120 labels in one session. If you try to edit more you will receive a message informing you to save the edits made so far. Once you save the changes you can continue to edit again.

You can also reset changes made to a single label or reset multiple labels at a time. The reset will update the label back to its original condition.
Timestamp check in the MARC21 LHR editor

A timestamp check has been added to the MARC21 LHR editor. If the LHR you're currently working on and want to save has been changed in the meantime, e.g. by another user or in a different session, you'll see a message telling you to refresh the record first and then add your changes.
Dropdown list for temporary shelving locations (876 $l)

If you're editing the temporary shelving location field in an LHR (876 $l) you will be able to select the values for the temporary shelving location from a dropdown list appropriate to the selected branch library.
Renamed Preferences to User Preferences

The Preferences button in the left panel has been renamed to User Preferences.
Bug fixes

Delete option missing for multipart and serial titles on Details screen

When trying to delete multipart and serial items using the Details screen after clicking View/Edit the Delete button that was missing before does now displays correctly.

Canadiana Authority Record Saved – In Progress issues

When printing a Canadiana Saved - in progress file record the 008/039 value shows up correctly as "National bibliographic agency" now.
Duplicate WorldCat bibliographic records when deriving a record

In some cases when deriving a bibliographic record and adding it to WorldCat two new WorldCat records were created. This has been fixed now, no duplicates are created.

Copy number does not display in list of LHRs

The copy number from the 852 $t is now displaying in the list of LHRs when the user preference under Working with Records>LHRs is enabled.

Dropdown for Location indexes missing in WorldShare Circulation or WorldShare Acquisitions under Local Holdings Records Search in Discover Items

When using the Location indexes under the Local Holdings Records search in Discover Items, the Branch and Shelving Location values will appear in the dropdown menu for selection in whichever module you access first and are blank in the module you access second. This issue has been resolved and the Location indexes will always appear.

Closed search tabs

Closed search tabs in Record Manager will not reopen after accessing WorldShare Circulation or WorldShare Acquisitions anymore.

User friendly facet names

Several facet names have been updated to user friendly names:

- artchapartcl to Print Article
- PrintBook to Print Book
- objectdigital to Object Digital
- intmmdigital to Interactive Multimedia Digital
- image2d to 2-D Image

Known issues

See Known Issues for the full list of issues in WorldShare Record Manager.

<table>
<thead>
<tr>
<th>ISSUE</th>
<th>DETAIL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title missing from display in Local Holdings Record Editor after removing a Shared Print commitment</td>
<td>When using &quot;Remove Shared Print Commitment&quot; from the Record dropdown within the LHR Editor, the title that previously</td>
</tr>
</tbody>
</table>
displayed in the LHR displays as "No Title Supplied". Once the LHR is saved, the title will appear as expected.

Important links

Post release session

To help you become familiar with the new features, enhancements and improvements included in this release, there a release update session. 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 Record Manager Release Session

Date: May 20, 2019 11:00 am Eastern time

Registration: Use this link to register for the 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
- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart