WorldShare Record Manager release notes, November 2019


Release Date: 23 November 2019

Introduction

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

- New bulk edit functionality and scripts have been added to better improve your bulk editing workflows:
  - You can now create multiple record work lists within the Local Bibliographic Data (LBD) and Local Holdings Records (LHR) tabs when you were previously limited to only one record work list for each.
  - Your institution can create up to 250 customized scripts that can be saved and used later instead of relying on the base scripts only.
  - New scripts have been added for bulk editing of public and nonpublic notes found in the 852 and 876 fields.

- Creating an expert search query for LHRs is now possible to improve LHR search results. You can now combine multiple LHR indexes in one search when previously you were limited to searching one LHR index at a time using the dropdown menu options.

- Label printing users will have access to additional label printing enhancements to better customize to your specific label printing needs and workflows, including:
  - You can now add up to 100 records directly on a Label Print List in My Labels with a new dialog box to print your labels. Previously you were limited to sending records to the Label Print List from bibliographic and LHR editors, LHR search results and text view item details page.
  - Five new content types; Author, Classification Part, Item Part (Cutter), OCLC Number and Title have been added to the existing content types for use on your Label Templates in My Labels. Previously you were limited to fewer content types on Label Templates.
  - You will see usability improvements in the Label Template Editor, Label Print List and Label Editor including new page accordions which combines relevant information or settings together with a hovering action bar that displays the buttons and messaging in one location that moves with you as you scroll up or down the page.
  - The Print button is now available on the action bar in the Label Print List as it was previously reported by some users to be hard to find when it was located in the Layout section of the page.
  - Dewey Decimal and Government Document classification numbers will be sent to the Label Print List when the default classification scheme is set in User Preferences.

- Art and Architecture Thesaurus (AAT) is now available as an additional authority file.

- Display of 020 $q (qualifying information) has been added to various display pages.

- Bug fixes:
  - Call number browse search in Record Manager now works correctly
- Language of Cataloging and Source of Cataloging in User Preferences - Searching Advanced selections are now applied in Advanced Search
- No longer see a server communication failed error message when selecting a copy with zero holdings
- Filtering by shelving locations with hyphens or dashes in LHR search results now works correctly
- Relator term has been updated according to Library of Congress standards

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

**Recommended actions**

For this release, we recommend that you review the following checklist and complete the relevant task so that you can adjust your policies and workflows and train your staff. The checklist identifies 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.

<table>
<thead>
<tr>
<th>ACTION</th>
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<tr>
<td>Update your Label Templates to use new content types.</td>
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**New features and enhancements**

**Bulk edit updates**

**Multiple Record Work Lists**

You can now create multiple record work lists within the LBD and LHR tabs of the Record Work Lists option located in the left navigation panel. Previously, users could only work with a single record work list for LBD bulk edits and a single record work list for LHR bulk edits. Now you can create up to 10 Record Work Lists for each data type. These lists are user specific, and you have the option to select a default record work list for more efficiently adding records during the record selection process.
Record work lists can be created from the Record Work Lists page (above), or on the fly from your search results:
Customized Scripts

You can now set up customized scripts and save them to use again, thus recovering the time previously needed to configure a base script for each bulk edit. Previously, users were required to configure options on a base script for each use. You will see a new tab called Customized Scripts, in your Toolbox located in the left navigation panel. For scripts that you have a need to run periodically, you can add your own customizations to existing base scripts and save the results. Customized scripts are not user specific, so you can use any customized script that has been set up by a staff member of your institution. Your institution can create up to 250 customized scripts that are then shared among all of your institution’s bulk edit users. When a customized script is no longer needed, you have the option to archive the script.

Note: Base scripts that require matching to a user-provided list of barcodes cannot be customized.
**New base scripts for public and nonpublic notes**

You now have new base scripts for editing in bulk the public and nonpublic notes in the 852 and 876 fields of local holdings records.

Base scripts are now available to:

- Add a public or nonpublic note to an existing 852 or 876 field in the LHR.
- Add a public or nonpublic note to an existing 876 field if the field has a corresponding matching barcode (876 $p).
- Replace a public or nonpublic string in an existing 852 or 876 field in the LHR.
- Replace a public or nonpublic string in an existing 876 field if the field has a corresponding matching barcode (876 $p).
- Delete the public or private note from an existing 852 or 876 field in the LHR.
- Delete the public or nonpublic note from an existing 876 field if the field has a corresponding matching barcode (876 $p).

**Expert search for Local Holdings Records (LHRs)**

**Submit an LHR expert search**

You can now type in an expert search query into the input box in the left panel in order to create a more concise query.

Example: all LHRs in the branch "MAIN" that have a lending policy of “Will not lend”.

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https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_…

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Boolean operators AND, OR, NOT can be used to create a concise search query.

If you want to narrow your results further down you can use the filter options on the results list.

**List of available LHR indexes**

The following index labels are available for creating an LHR expert search:

- Action Note (p8)
- Barcode (bq)
- Bibliographic Control Number (p6)
- Branch/Shelving Location (b8)
- Call number (l5)
- Holdings Record Number (p5)
- Lending Policy (p3)
- LHR Control Number (dt)
- MARC Organization Code (p7)
- OCLC Number (bn)
- Private Note (p1)
- Public Note (nt)
- Reproduction Policy (p4)
- Temporary Shelving Location (p2)

See details about indexed LHR fields and subfields [here](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_...).
My Labels

Add records using barcodes on a Label Print List

Barcoded LHRs can now be added directly to a Label Print List using the "Add Record(s) Using Barcode(s)" feature. Up to 100 records can be added to a Label Print List at a time and the records will appear on the list in the order the item barcodes are entered in the "Add Record(s) Using Barcode(s)" dialog box.

Item barcodes can be scanned or entered in the text box and each barcode must be separated with a space, comma, or line return; however, commas and line returns are automatically converted to spaces. The system will only attempt to add records and the corresponding labels for the first 100 barcodes entered. Once you have entered your barcodes in the "Add Record(s) Using Barcode(s)" dialog box, click Add to edit and print the labels from the Label Print List.
New content types in Label Templates

You now have five new content types available for use on Label Templates in My Labels. The new content types are: Author, Classification Part, Item Part (Cutter), OCLC Number and Title. Existing content types can continue to be used and previously configured Label Templates will not be impacted by the addition of the new content types.

The new content types are intended to be used on wider labels and the system will not automatically apply text wrapping as it does with the existing Data content type. This means if the text exceeds the size of the label, the text on the label will need to be adjusted manually using the Label Editor on the Label Print List.

The Author, Classification Part, Item Part (Cutter), OCLC Number, and Title content types can only be used on a new Label Print List and not applied to an existing list.

Usability improvements

You will see various usability improvements in My Labels on the Label Template Editor, Label Print List and Label Editor including new page accordions which combines relevant information or setting on the page together with a new hovering action bar that displays the buttons and messaging in one location that moves with you as you scroll up or down the page.

The Print button on the Label Print List has been moved into the hovering action bar for the page due to member feedback saying the Print button was hard to see on the page.

If your library uses the Dewey Decimal or Government Document classification schemes and you send your records to a label print list from the bibliographic record, the applicable classification field will be used to populate the call number on the label. Previously the Library of Congress classification field was always sent when you selected Dewey or
Art & Architecture Thesaurus (AAT) Authority File

Searching and browsing AAT

The Art and Architecture Thesaurus (AAT) has been added to the list of available authority files under the data type "Authority Records".

Two new scopes have been added to the dropdown for authority files:

- AAT
- AAT - Browse

Select an index, type in your search terms and submit the search or browse. Results display in a results list.

Working with AAT records

You can now print, edit, export and save AAT records to the Saved – In Progress File.

You can apply an AAT subject heading to a bibliographic record by clicking on "Copy Authority Data" when viewing the authority record and then inserting it by clicking on "Apply Authority Data" in the Edit menu of the bibliographic record.

You can also type in AAT subjects manually in the bibliographic record and then single-control by using the "Controlled Heading" / "Add" option or control all headings in the bibliographic record at once with the "Control All Headings" in the Record menu.

You can NOT create or replace AAT records.
Applying a link / controlling AAT headings

AAT authority headings can be added as subject headings to bibliographic records and controlled. The condition is that field 650 has a 2nd indicator 7 and the field contains a $2 aat.

Displaying 020 $q (qualifying information)

The 020 $q subfield (qualifying information) now displays along with the actual ISBN from the 020 $a on search results list, in the information icon (“blue i”) and on the details page. This helps with differentiating multiple ISBNs for e.g. different formats.
Bug fixes

**LHR Call Number Browse not retrieving results consistently**

Call numbers were not properly indexing when searching Local Holding Records in Record Manager but were working correctly in WorldShare Acquisitions and Circulation. Call Number Browse is now working correctly in Record Manager, Acquisitions and Circulation.

**User Preferences and language selection in Advanced Search**

When users attempted to select Language of Cataloging and Source of Cataloging in User Preferences - Searching Advanced, the selections were not applied within the Advanced Search dialog box. This issue has been fixed and selections made in preferences are now applied when Advanced Search is used.

**Server communication failure after selecting a copy with zero holdings**

When a user selected a displayed copy record with zero holdings, a no server communication error message displayed. This has been corrected and the copy with zero holdings can now be selected without an error message displaying.

**LHR filter by Shelving Location when hyphen is present**

Some users with hyphens in their shelving location names reported an issue when filtering within the LHR search results by a shelving location with the hyphen. This issue has been resolved and locations with hyphens can now be correctly filtered.

**Relator Term list update for metadata subfields**

Bibliographic Records that contain the Relator Term list phrase, "Degree Grantor" in the MARC 21 editor, has been replaced with Library of Congress Standard, "Degree Granting Institution."

**Known issues**

**Diacritics in script names**

Diacritics in script names will cause the filter to be unable to filter to that script name. Users should avoid using diacritics in script names until this issue is resolved.

**Important links**
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
- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart