WorldShare Record Manager release notes, May 2020

Release Date: May 30, 2020

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:

- Bulk edit local data in any valid field and subfield with new scripts:
  - You can now add or delete any field or subfield as well as replace any subfield in both Local Holdings Records (LHRs) and Local Bibliographic Data records (LBD).
  - The scripts allow you to enter the field/subfield you wish to change and define conditions such as matching text.

- You can now submit up to 250 OCLC numbers when searching for bibliographic records, LBD or LHRs. The OCLC numbers are automatically linked by Boolean OR. Previously you were only able to add one OCLC number at a time with the OCLC number index or would have to add the Boolean OR manually when using an expert search.

- Constant data improvements:
  - When applying constant data in the MARC 21 bibliographic record editor or the LHR editor the fields that are populated by a constant data application are highlighted for better visibility. Prior to this release there was no indication as to which fields were applied by the constant data record.
  - A new setting under User Preferences is available for you to specify which LHRs field ranges you want copied to a new constant data record from an existing LHR or LHR constant data record. Previously this was not possible.

- Label printing users will see improvements made to My Labels, including:
  - Additional label formats are available for you to select within label templates that consist of combinations of spine and processing labels. The new label formats can be customized to include different data content on each label. Previously these label formats were only available for label printing using the OCLC Label Program. The new label formats are:
    - SLB (label set using one spine and one processing label)
    - SL4 (label set using one spine and two processing labels)
    - SL6 (label set using two spine and two processing labels)
    - Custom Label Set (label set using up to four labels)
  - Text wrapping will now occur automatically on labels when the line of text is longer than the width of the label. Prior to this release you had to manually edit the line of text on the label to force the data to the next line.
  - The display order of the Edit Label Text box and the Preview Label box in the Label Editor has been changed.
This update was made to accommodate the new label formats and will also impact the existing label formats (A12360, L7651, SP1, and Custom Label).

- Updated label settings within label templates for the A12360, L7651, and SP1 label formats allow for greater flexibility when customizing templates. You can now modify the label settings height and width when previously the label size settings were disabled. These changes will not impact previously configured label templates.  
  (Released May 16, 2020)

- An improvement has been made in the Label Editor to help you clearly see which label you have modified when working with multiple labels in a label print list. Previously, the page displayed an orange edit icon indicating that you made edits to all of the labels on the list.  
  (Released May 16, 2020)

- When creating a new label template, the default selections for the Label Setup table were updated from previous settings to encourage customization of the table for your labels. These changes will not impact previously configured label templates.  
  (Released May 16, 2020)

- Users can now derive a personal name authority record from a bibliographic record. When deriving the new authority record some fields like dates, the 670 field and potential variant names are transferred from the bibliographic record into the authority record. The new authority template offers a guided entry workflow to expand and collapse the required fields. Previously users had to create authority records by opening a new template and populating all fields manually.

- Miscellaneous enhancements:
  - When searching for LHRs the search results are sorted by OCLC Number by default. You can now change the sort order by clicking the up/down arrows in the respective columns. Previously this sort order could not be changed.
  - After uncontroverting a controlled authority heading the $0 subfield that contains the ID of the heading is now displayed. Previously the $0 subfield was not displayed after removing a controlled link.
  - When deriving an LHR from a bibliographic record the 020 and 5xx fields are no longer transferred into the LHR. Previously all 020 and 5xx fields were moved into the LHR.

- Bug fixes:
  - When selecting specific call numbers from a browse result list in some cases a "No results" message was incorrectly returned.
  - Previously when leaving a variable field, the blank spaces between text in subfields were removed. Now the blank spaces remain.
  - The order of subfields in fields with Arabic script (which reads from right to left) was not displayed correctly.

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 tasks so that you can adjust your policies and workflows and train your staff. These checklist identifies updates that we have determined to be 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**

To keep your staff informed of new features and changes, you may also want to consider these items.
Update your User Preference setting "Fields for New Constant Data Records". This setting is located under the LHRs tab under Working with Records and is used for creating new LHR constant data records.

Create label templates with the new label formats in My Labels if your library is currently using the OCLC Label Program to print SLB, SL4, or SL6 label sets.

New features and enhancements

New Scripts for Bulk Edit

New bulk scripts for editing Local Holdings Records and Local Bibliographic Data have been added. For the scripts that delete or replace existing fields/subfields you can also limit updates to records that have matching text.

Example: Delete the non-public note in LHR 876 fields if matching text is found that equals "Sent to quarantine"

New LHR scripts

You can now add or delete any field or subfield as well as replace any subfield in Local Holdings Records (LHR).
The new LHR scripts are:

• Add LHR Field
• Add LHR Subfield
• Delete LHR Field
• Delete LHR Subfield
• Replace String in any LHR Subfield

New LBD scripts
You can now add or delete any field or subfield as well as replace any subfield in Local Bibliographic Data records (LBD).

The new LBD scripts are:

• Add LBD Field
• Add LBD Subfield
• Delete LBD Field
• Delete LBD Subfield
• Replace String in any LBD Subfield

Searching multiple OCLC Numbers
You can now submit up to 250 OCLC numbers for searching these data types:

• Bibliographic Records
• Local Bibliographic Data (LBD)
• Local Holdings Records (LHR)

The OCLC numbers in the search term input field are automatically linked by Boolean OR. Previously you were only able to add one OCLC number at a time using the OCLC number index or would have to add the Boolean OR manually when using an expert search.

If you have reached the maximum number of OCLC Numbers (250), you will see a corresponding message and cannot add more OCLC Numbers.
Enhancements for Constant Data

Field highlighting

When applying constant data in the LHR record editor the fields that are populated by a constant data application are highlighted in light blue for better visibility. Previously there was no indication as to which fields were applied through the
constant data record.

**User Preference for LHRs**

A new User Preference setting "Fields for New Constant Data Records" is available under the LHRs tab under Working with Records. This setting will allow you to specify which LHR field ranges you want copied to a new constant data record from an existing LHR or LHR constant data record.

Expand the Hide Fields link and select the field ranges you wish to copy over.
My Labels

Additional label formats

Four new label formats have been added for you to select within label templates that consist of spine and processing labels. The new label formats can be customized to include different data content on each label in the set. Previously these label formats were only available for label printing using the OCLC Label Program.

These new label formats include:

- SLB (label set using one spine and one processing label)
- SL4 (label set using one spine and two processing labels)

- SL6 (label set using two spine and two processing labels)
<table>
<thead>
<tr>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td>574.55 C518</td>
</tr>
<tr>
<td>Cheng, Thomas C. Symbiosis 574.55 C518</td>
</tr>
</tbody>
</table>

- Custom Label Set (label set using up to four labels), example with 2 spine labels and 2 processing labels
Text wrapping

Text wrapping will now occur automatically on labels when the line of text is longer than the width of the label for all content types except the Data content type. When using content types that will supply longer strings of data such as Author or Title on your labels, you will no longer need to manually edit the line of text on the label to force the data to the next line. If you do not like how the data wraps, you can still edit manually using the Label Editor.

Label Editor display update

When working in the Label Editor you will now see the Preview Label box and the Edit Label Text box in reverse order. This update was made to accommodate the display for the new label formats and will also impact the display when using the existing label formats (A12360, L7651, SP1, and Custom Label).

You can continue to edit the label in the Edit Label Text box or in the Content table. All changes will be reflected immediately in the Preview Label Set box.

Example of Label Editor display for SLB (label set using one spine and one processing label) format:
Example of Label Editor display for SP1 (single spine label size) format:

Updates for A12360, L7651, and SP1 label settings (Released May 16, 2020)

When you add a new label template you will see updates to the label settings for the A12360, L7651, and SP1 label formats that allow for greater flexibility in customizing templates for your specific label printing needs. You will now be able to modify the label settings height and width when previously the height and width sizes under label settings were disabled and you were required to use the Custom Label format if you wanted to enter your own label sizes.

These changes will not impact previously configured label template settings, but you will see in your existing templates that you can now adjust the label height and width when it was grayed out prior to this release.
Label Editor edit icon improvement (Released May 16, 2020)

You will now be able to clearly see which label you have performed edits on in the Label Editor when working with multiple labels on a label print list. Previously, the page displayed an orange edit icon indicating that you had made edits to all of the labels on the list rather than on labels that were actually edited.

New default selections in label setup table for label templates (Released May 16, 2020)

The default selections in the drop-down for Content and Font have been updated in the label setup table for label templates. The default selections were updated from previous settings to encourage customization of the table for your labels. More information about the label content types can be found on the About label templates page.

These changes will not impact previously configured label templates.

Derive Authority Record from a Bibliographic Record

The ability to derive a personal name authority record from a bibliographic record has now been implemented.

When viewing a bibliographic record the “Derive Authority Record” option under the Record Menu is active only when the cursor is in one of these fields; 1xx, 6xx or 7xx. The heading can be either controlled or uncontrolled. An authority record can be derived from a heading in an existing bibliographic record or from a new record template.
Click "Derive Authority Record" and you will see (depending on your institution's setup) a dialog where you can choose the authority type you want to create a new record for and your MARC Organization Code.
Click the Derive button takes you to another dialog where you can choose content for the 670 $b field and if applicable, you can select variant forms of a personal name.
Clicking the Insert button derives a new authority record and some fields like dates, the 670 field and potential variant names are transferred from the bibliographic record into the authority record.

**Guided Entry for authority records**

The new authority template offers a guided entry workflow to expand and collapse the required fields. If fields are collapsed you will see a hint text in the input field that describes what this field is about.
Expanding a field by clicking the arrow shows the most relevant subfields. Others can be added by using the Plus icon on the right (the Minus icon deletes a row).

Add the record to the authority file by clicking the "Add Record to Authority File" option under the Record menu.
Note: As said above you can currently only derive personal names from a 100 field. However, the "Derive Authority Record" option under the Record menu is active for all 1xx, 6xx, 7xx and 8xx fields as the missing functionality for records other than personal names will be added in a future release. For now, you will see an error message telling you that the record type is currently not yet supported.

Miscellaneous Enhancements

Ability to sort LHR result lists

When searching your Local Holdings Records, the search results display is sorted by OCLC Number. You can now change the sort order of that result list by clicking the up/down arrows in the respective sortable columns. Previously this sort order could not be changed.

Display of $0 subfield for uncontrolled authority headings

After uncontrolling a controlled authority heading, the $0 subfield that contains the ID of the heading is now displayed. Previously the $0 subfield was not displayed after removing a controlled link.

Example: the $0 displays as a mouse-over for a controlled heading
After removing the controlled link, the $0 displays in the 100 field

Derive LHR

When deriving an LHR from a bibliographic record, the 020 and 5xx fields are no longer transferred into the LHR. Previously all 020 and 5xx fields were moved into the LHR and had to be removed manually.

Bug fixes

Searching call numbers

When selecting specific call numbers that appear in a browse result list, a "No results" message was returned in some cases. This no longer appears.

Blank spaces in subfields

When leaving a variable field, the blank space between text in subfields was removed. Now the blank spaces remain in the field.
Order of subfields in Arabic script

The order of subfields in fields with Arabic script (which reads from right to left) was not displayed correctly. Now the order of Arabic subfields is correct.

Important links

Product Insights: WorldShare Record Manager

To help you become familiar with the new features, enhancements and improvements included in this release, there is a Product Insights session recording available on the WorldShare Record Manager Community Center Events page.

WorldCat Validation release notes

WorldCat Validation release notes provide current OCLC-MARC updates; changes to tagging conventions and coding practices for Bibliographic, Authority, and Holdings records; and new MARC codes.

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