WorldShare Record Manager release notes, August 2019

Last updated: Tue, 20 Aug 2019 18:43:10 GMT

Release Date: 24 August 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:

- If your library is a BIBCO participant, you can now easily conduct cataloging activities such as replacing and creating BIBCO records (which contain "pcc" in the 042 field) within WorldShare Record Manager when a new BIBCO cataloging role is assigned to your WorldShare account. Previously BIBCO cataloging activities were limited to OCLC Connexion and have now been added to WorldShare Record Manager.

- To help streamline label printing workflows, you can now access label printing functionality in one place, a new stand-alone tab called “My Labels” which will be available under Record Manager following this release and under additional WorldShare applications in future releases. Records will now be sent to the label print list from the text view item details page and the local holdings records search results (up to 100 records at a time). Previously you were limited to sending records to the label print list from the bibliographic record and LHR editors.

- Label printing users will have access to additional label printing enhancements to better customize to your specific label printing needs, including:
  - Six new font selections and sizes when previously you were limited to four fonts and only even font sizes
  - An increased maximum count (formerly copies) of labels that appear on the label print list instead of the current limitation of nine copies at a time.
  - A new column and row space setting now allows you to set the space between columns and rows for label sheets on applicable label templates when previously no such setting existed in Record Manager.

- Libraries using Local Bibliographic Data (LBD) bulk actions can now use field strings in Record Manager to add data in bulk to existing LBD records. This improves consistency and efficiency when adding LBD fields in bulk or one-at-a-time in the bibliographic record editor. Prior to this release, existing LBD record bulk updates were limited to the 500 and 590 fields.

- To improve record editing efficiency and quality, you can now create new field strings in your Toolbox or within the bibliographic record editor with new enhancements. Prior to this release you were limited to saving field strings with existing data and modifying as needed.

- When creating and editing a bibliographic record and language of cataloging is French, you will now receive autosuggestions for Canadiana Names that can be selected prior to typing the entire name into the field in the bibliographic record which makes record editing easier and quicker.

- The 040 field is now editable in LC and Canadiana authority records to allow you to easily add multiple $e values or update or add a language of cataloging in the $b yourself instead of sending the change request to OCLC.

- An increased number of rows in authority records search results now allows you to view and discover more results on a given search within one page instead of scrolling through multiple pages of results.
• A new display Request ID now appears in the left sidebar that can be provided to OCLC when troubleshooting issues. Including this information allows OCLC to directly trace what happened on the request we are troubleshooting.

• New LHR index for OCLC Number of the bibliographic record when searching My LHRs to allow you to discover LHRs associated with a specific bibliographic record.

• Wordings for branch, location and holding location have been adjusted for consistency across WorldShare applications.

• Bug fixes:
  ◦ The title now displays in Local Holdings Record editor after removing a Shared Print commitment
  ◦ "Enhance 505" advanced action works correctly
  ◦ Records created using the "Derive Electronic Record" advanced action can now be saved to Saved - In Progress
  ◦ Initial articles for 245 field are no longer transferred to field 776 $t when the "Derive Electronic Record" action is used
  ◦ The 049 field now shows the correct holding code
  ◦ Pipe characters are now removed from classification fields that previously caused bibliographic record exporting issues

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.

Administrative actions

These items require immediate action or decisions.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Cataloging BIBCO role to users that can create and replace BIBCO records.</td>
</tr>
</tbody>
</table>

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.
NEW FEATURES AND ENHANCEMENTS

BIBCO ROLE

If your library is a BIBCO participant, you can now easily conduct cataloging activities such as replacing and creating BIBCO records (which contain “pcc” in the 042 field) within WorldShare Record Manager when a new BIBCO cataloging role is assigned to your WorldShare account. Previously BIBCO cataloging activities were limited to OCLC Connexion and have now been added to WorldShare Record Manager.

BIBCO members who are already using Record Manager can contact OCLC Support to request the BIBCO role is added for your institution to select on library staff WorldShare accounts. If your institution is not already using Record Manager but are interested in doing so, please complete the online request form to request access. In the comments of the request form, please include the note that your institution is a BIBCO member.

For more information about roles, see Record Manager account roles.

MY LABELS

To help streamline label printing workflows, you can now access label printing functionality in one place, a new stand-alone tab called “My Labels” which will be available under Record Manager following this release and under additional WorldShare applications in future releases.

My Labels includes Label Print Lists, where you can now have up to 100 lists instead of only one, and Label Templates which was formerly Working with Labels under User Preferences in Record Manager. Your existing label print list and labels templates previously configured before the release will be retained and are tied to a user’s WorldShare account.
Send to Label Print List button added to Text View Item Details and Local Holdings Records search results

Records can now be sent to a label print list from the text view item details page and the local holdings records search results (up to 100 records at a time). Previously you were limited to sending records to the label print list from the bibliographic record and LHR editors. The Send to Label Print List button will only appear on the text view item details page and the LHR search results under Record Manager until My Labels is available under additional WorldShare applications in future releases.
Once you click Send to Label Print List, if you have more than one label print list, you will be prompted with a dialog box asking which list you would like to send the records. Whichever list you select as your default will appear selected, but you can also select a different list from the dropdown selection:

**Send Record to Label Print List**

<table>
<thead>
<tr>
<th>Default Label Print List</th>
<th>label print list 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiction collection</td>
<td>Size 11 labels</td>
</tr>
<tr>
<td>General books</td>
<td>Reference collection</td>
</tr>
<tr>
<td>New label print list</td>
<td>Children's books</td>
</tr>
</tbody>
</table>

Messaging will let you know if the records you selected were successfully sent to the label print list or not:
Enhancements for label printing

Increase label count (copies)

You will now have an increased maximum count (formerly copies) of labels that you can add for a call number on the label print list from 9 to 99. You can type the number of labels you need in the Count input box or use the up and down arrows to adjust and your labels in the layout section will update accordingly.
New fonts and sizes
You will now be able to choose from ten fonts for the text on your labels: Arial, Arial Narrow, Calibri, Century Gothic, Courier New, Georgia, Tahoma, Times New Roman, Trebuchet, and Verdana. The font sizes available are now 1-14, odd and even sizes when previously you were limited to even sizes.

Column and row spacing
Label printing users can now use a new Column and Row space setting within your label templates that will allow you to set the space between columns and rows for label sheets on applicable label templates when previously no such setting existed in Record Manager. This will allow you to fine-tune the specifications for non-standard label templates and should help eliminate reports of "label creep" where text of labels is moving off center within the labels and off the page.

You can type the size you need in the Column and Row input boxes or use the up and down arrows to adjust and the spacing will be applied to your labels accordingly.
Other label format renamed to Custom

The existing "Other" label format has been renamed to "Custom" to reflect it is a label format that you can customize.

LBD bulk actions add field string

Libraries using Local Bibliographic Data (LBD) bulk actions can now use field strings in Record Manager to add data in
bulk to existing LBD records. The use of field strings improves data consistency and efficiency when adding LBD fields in bulk or one-at-a-time in the bibliographic record editor. Prior to this release, existing LBD record bulk updates were limited to the 500 and 590 fields.

New Field String button in Toolbox

You can now easily add new field strings in your Toolbox with the New Field String button when previously field strings were saved from within the bibliographic record editor.
Create Field String from bibliographic record editor

You can now create a field string from within the bibliographic record editor when previously you were limited to only saving field strings with existing data and updating as needed.

Field strings can be created within the bibliographic record editor by using the Edit drop-down and selecting Field then Create Field String or by right clicking within a field in the bibliographic record and selecting Field then Create Field String.
Autosuggest for Canadiana Names authority records

When creating or editing a bibliographic record with a language of cataloging French (040 $b fre) and adding descriptive headings in 100, 110, 111, 130, 700, 710, 711, 730, 800, 810, 811, or 830 you will now receive autosuggestions for Canadiana Names that can be selected prior to typing the entire name into the field which makes record editing easier and quicker.

Enable or disable the autosuggest functionality for Canadiana Names in your User Preferences.

User preference for autosuggest

You can enable or disable the autosuggest feature for the Canadiana authority file as well as for the LC authority file in your User Preferences.

- Click on User Preferences in the left sidebar
- Expand the Working with Records accordion
- Select the Bibliographic Records tab
- Check the Controlled Headings preference and check or uncheck Canadiana Names
Autosuggest for Canadiana Names

After you have enabled the above preference for Canadiana Names you can take advantage of suggestions when creating or editing a bibliographic record with language of cataloging French.

- Create or edit a bibliographic record
- Language of cataloging is French (040 $b fre)
- Put the cursor in any of these fields: 100, 110, 111, 130, 700, 710, 711, 730, 800, 810, 811, or 830
• As you start typing you will see suggestions corresponding to your input
• Select one of the headings and it will be added as a controlled heading
• If you don't select a heading from the suggested list, just continue typing and add a new heading or cancel by clicking out of the field

Field 040 made editable in LC and Canadiana authority records

The 040 field in LC and Canadiana authority records is now editable in the case that you might want to add multiple $e values, or update or add a language of cataloging in $b. Prior to this release, you were not able to make edits to the 040 field in authority records yourself and needed to send a change request to OCLC.
Validation will make sure that no incorrect codes are entered.

**Number of rows for authority records search results increased**

The number of rows for the authority records search has been increased to show 10, 20, 50 or 100 when previously it was 10, 20, 50. This allows you to view and discover more results on a given search within one page instead of scrolling through multiple pages of results.

![Image of WorldShare Record Manager interface](https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_-_...)

**Request ID in left sidebar**

When reporting an issue with Record Manager it is extremely helpful to include the Request ID(s). The Request ID information is found at the bottom of the Record Manager tab in the left sidebar and can be copied by clicking on the Copy Request ID(s) link.

Including this information allows OCLC to directly trace what happened on the request we are troubleshooting.
New LHR index for OCLC number of the bibliographic record

Note: This index will be available under additional WorldShare applications in future releases.

A new index (bn:) has been added to list of indexes for searching local holdings records. You can use it to search for LHRs associated with a specific OCLC number.

- Select data type "Local Holdings Records"
- Scope to "My LHRs"
- Expand index dropdown: the new index is "OCLC Number" and searches the 004 field of the LHR

Adjust wording for branch, location and holding location

In order to use consistent terminology across all WorldShare applications we made the following name adjustments:

- In the list of LHR search indexes the former Location index is now called Branch/Shelving Location
- In LHR result lists the former Location filter is now called Branch/Shelving Location
- When working in the LHR text-view the former Holding Location field is now called Branch

Bug fixes

Title missing from display in Local Holdings Record Editor after removing a Shared Print commitment

When using "Remove Shared Print Commitment" from the Record drop-down menu within the LHR Editor, the title
previously displayed in the LHR displays as No Title Supplied. The title will now continue to display after the "Remove Shared Print Commitment" option is used.

"Enhance 505" Advanced Action

The "Enhance 505" action in the Advanced Action drop-down list in the bibliographic record editor will now correctly update a 505 field that ends with a period when previously 505 fields with a period at the end would not update when the action was applied.

Bibliographic records created using the "Derive Electronic Record" action cannot be saved to Saved - In Progress files

When a bibliographic record is created using the "Derive Electronic Record" action, it can now be saved to the Saved - In Progress files when previously a workaround was needed to save the electronic record in the Saved- In Progress file.

Initial articles for field 245 in "Derive Electronic Record" Advanced Action

When deriving an electronic record that has a 776 field using the Advanced Action validation errors will no longer occur. Prior to this release the initial article from field 245 was being transferred to field 776 $t.

049 field showing incorrect holding code

The 049 field will now show the holding code that has been selected in your user preferences. Some libraries were reporting that the user preference selection was not being retained and this has been corrected.

Pipe characters removed from locally supplied classification fields

In user preferences, libraries who selected the classification scheme; National Agricultural Library, Government Document, Universal Decimal, or Canadian National Library were reporting errors when exporting bibliographic records that were caused by pipe characters within the local classification field. The pipe characters have been replaced with blanks which will no longer cause the export error.

Important links

Post release session

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

https://help.oclc.org/Metadata_Services/WorldShare_Record_Manager/Release_notes_and_known_issues/2019_...
Date: August 26, 2019 10:00 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](#)