Contents

Introduction ........................................................................................................................................... 2

Enhancements ...................................................................................................................................... 3
  Search box has been moved to the top of the navigation menu ......................................................... 3
  Left navigation menu buttons have been combined ............................................................................. 3
  Settings options have been reorganized ............................................................................................... 4
  Save button has been redesigned ......................................................................................................... 5
  Tabs have been utilized when multiple options are presented ............................................................. 5
  Reports are easier to find ....................................................................................................................... 5
  Title linkscheme now correctly overwrites collection level setting .................................................... 6

Matching improvements ....................................................................................................................... 6

Created/Selected dates have been added to titles .................................................................................. 6

Change password .................................................................................................................................. 7

Add services to my account .................................................................................................................. 8

Bug fixes .............................................................................................................................................. 10

  “New Collections” button renamed .................................................................................................... 10

  Google Scholar keywords are now optional ......................................................................................... 10

Important links ...................................................................................................................................... 11
Introduction

The following release notes are for the May 2015 install of WorldShare Collection Manager and WorldCat knowledge base, scheduled for May 3. This release brings many enhancements to the Collection Manager user interface.

In September-October of 2014, the Collection Manager team conducted a usability study with some of our veteran and novice Collection Manager users. We discovered several areas where we felt that changes to the user interface could greatly improve the user experience. In this release are the inaugural changes resulting from that usability study. Steps have been taken to simplify profile setup and to help you avoid common setup errors. In future releases, more changes to the user interface will be introduced. Thanks to all who participated in the usability study and provided much excellent feedback.

Enhancements to the WorldCat knowledge base have also been made in this release. Additional efforts to help improve matching of WorldCat knowledge base titles to WorldCat records have been initiated. Over the next few months, these improvements will become apparent as re-matching of knowledge base collections to WorldCat records is performed. Work has also been completed to ensure that title level values should correctly overwrite collection level linkscheme settings.

Finally, we’ve fixed a few bugs and you’ll notice some changes in the WorldShare Interface. We’ve made it easier to change your password and to initiate the addition of services to your account within the WorldShare interface.
**Enhancements**

Search box has been moved to the top of the navigation menu

The most commonly used item in the left navigation menu is the Search box. We have moved the Search box to the top of the navigation menu for easier access. The filter previously known as “My Library Holdings Only” has been relabeled “My Selected Collections” to avoid confusing your knowledge base collections with WorldCat holdings. The filter retains the same functionality, limiting your search to those collections that you have created or selected within the knowledge base.

Left navigation menu buttons have been combined

Results of our usability study indicate that during the initial setup of the Collection Manager profile, our users had difficulty determining if a setup option existed within the Settings or the Library Holdings button. This was a common confusion, so we have combined the two buttons so that all settings can now be found under a single button called Settings.

Additionally we have combined the “Create Standard Collection” and “Create WorldCat Query Collection” buttons into a single button labeled “Create a Collection” in order to present a cleaner look and feel.
When a user selects “Create a Collection” a dialog box is presented that allows a choice of collection type, with Standard Collection being the default choice. The dialog box includes tooltips that define the collection types:

Settings options have been reorganized
A large portion of the work completed in this release involved combining the options from the Settings and Library Holdings buttons into a single display. As options were moved, many were consolidated into more logical groupings. Within the options, additional tooltips have been added for more contextual help. Settings that are dependent on other settings now present the value of the dependent setting as well as a link back to that setting, in the event that revisions are needed.
Save button has been redesigned

The Save button within Settings has been redesigned. It has been moved from the far right to the left and has been made a bit larger and blue, for better visibility. Additionally, the button now remains visible as you scroll through the page, instead of scrolling off the top of the page.

Tabs have been utilized when multiple options are presented

When multiple options are presented within a single accordion, they are now displayed as a series of tabs, to avoid the need to scroll through a long list.

Reports are easier to find

Reports have been moved into an exclusive accordion. This locates all reports in a single area and makes them easier to find:
Title linkscheme now correctly overwrites collection level setting

When a single collection uses multiple linkscheme values at the title level, in some cases the first encountered linkscheme was used for all titles, thus breaking linking. This has been corrected in this release. Title level (including blank) values now correctly overwrite collection level linkscheme settings when appropriate. If a linkscheme value is blank, you will now see [empty] to represent this blank value.

While the linking improvement is being installed in May, the changes will not be apparent at install time. The knowledge base team will be waiting 1 to 2 months to enable this change, in order reduce the impact on our academic member libraries.

Matching improvements

Two efforts were undertaken in this release to improve the matching of WorldCat knowledge base titles to WorldCat records. With the May release, we will use English as the default language of cataloging when matching, to eliminate receiving matching records with a language of cataloging different from what the user is expecting. In many cases, the knowledge base data used for matching does not contain language information, so we will default to English as the preferred language of cataloging.

Additionally, a bug was discovered that in some cases was truncating titles that included certain punctuation, often resulting in false positive matches for these titles. This problem has been corrected and we expect to see false positives greatly reduced. These improvements may not be apparent immediately, but in the coming months as collections are re-matched you can expect to see improvements in matching for both single titles and OCN grouping.

Created/Selected dates have been added to titles

“Created” and “Selected” dates have been added to the title level details page:
In all cases, a “Created” date will be displayed on the title detail page. Only in the case when an individual title is selected/overlaid will a “Selected” date be displayed. The title level “Selected” date is not shown when:

- A collection has not been selected (no selection has taken place)
- The collection is a local collection (no selection has taken place)
- A collection is selected in its entirety (no title level selection has taken place).
- Viewing the cooperative approval screen (no selection has taken place)

Change password

Users can now change their passwords within the WorldShare interface. The new option is accessed under the User Menu:
The user must provide the current password, the new password, and then verify the new password, following the current password restrictions. Pressing the **Change Password** button registers the change immediately.

**NOTE**: The change password option will NOT be available for institutions that manage their own authentication through, for example, a campus LDAP or Shibboleth server.

### Add services to my account

Authorized institution users may add OCLC services to their account within the WorldShare interface. The new option is accessed under the User Menu.

Selecting the **Add Services to my Account** option will require users to specify their institution.
After the user selects their institution and clicks the Continue button, the ‘Add new services to an existing OCLC Services account’ screen displays. On this screen, the user must login with their institution’s existing authorization number and password.

NOTE: The add services to my account option will NOT be available for institutions that do not have an OCLC Services account.
Bug fixes

“New Collections” button renamed
While not a true bug, we realize that the “New Collections” button that was introduced in the last release has been causing some confusion. Some users were confused by the presence of this button, thinking that this was the option to create new collections. The button has been renamed “View Recent Collections” to better describe its function. Selecting this button displays all collections in reverse chronological order, with the newest collections at the top of the list.

![Image of WorldShare interface with View Recent Collections button highlighted]

Google Scholar keywords are now optional
The keywords field in the Google Scholar setup is labeled in the user interface as optional, but failure to provide a keyword resulted in an error message. This has been fixed, and keywords are now optional as indicated.
Important links

Offices hours

- Tuesdays, 12 noon – 1:30 pm Eastern Time (US)
  WebEx link for office hours
  Call-in toll-free number (US/Canada): 1-877-668-4490
  Access code: 712 496 861

Release update session

- Thursday, April 30, 1:00 pm Eastern Time (US) – register here
- After the session, the recording will be posted here

Product Web site

More product information can be found at:

- WorldShare Metadata

Support Web sites

- Collection Manager Support & Training
- Collection Manager Release Notes
- Browser compatibility chart
- Known Issues

Notices

© 2015 OCLC Online Computer Library Center, Inc. All rights reserved. The following OCLC product and service names are trademarks or service marks of OCLC Online Computer Library Center, Inc.: “WorldShare® Collection Manager” and “The world’s libraries. Connected.” The OCLC, WorldCat and WorldShare symbols are service marks of OCLC. Third-party product service names are trademarks or service marks of their respective companies. OCLC grants permission to photocopy this publication as needed.