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>None</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.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Determine which license terms you would like to display in your public Discovery interface.</td>
</tr>
</tbody>
</table>

Browser support

This release was tested with the following browsers:

- Chrome Version 67.0.3396.87
- Firefox 60.0.2
New features

Publish License Terms of Use as public notes in WorldCat Discovery

License Manager now offers an automated method for updating and maintaining your knowledge base collections' public notes.

The public notes display wizard is activated via the "Public Notes Display" button. The first step is comprised of four elements:

1. A plain-text "details" box where you can enter non-structured text. This can be used to communicate policies, important information, or even links to surveys.
2. A list of available license terms shows the term title on the left, and the subsequent output on the right. The example display text here demonstrates the maximum number of characters that could be placed in the public note field. The content being placed into a collection public note will depend on the actual terms of use associated with each license.

3. “Clear Selections” will remove all selected content. This essentially creates a blank public note template which can be used to erase all content from collection public notes if desired.

4. There is a display limit of 1,024 characters in collection public notes. If you exceed that limit at this stage, the wizard will not allow you to continue. Simply remove terms or text until the “characters used” falls below 1,024.

The next step of the wizard allows you to rearrange the public notes you’ve selected. Simply click the up and down arrows to re-order terms.

The third step of the wizard allows you to preview your public notes template and then let License Manager know what
you’d like to do with any existing public notes.

1. Existing Public Notes Content – gives you the option to either protect or to overwrite your existing public notes.
2. Example Display – shows you the public note output if your licenses were each to have all the indicated terms associated with the license. The template result will only display those terms encoded within each license.

Note: The Example Display features line breaks which will not be visible to users until late summer, 2018. This time will be used by the WorldCat Discovery team to finalize changes to their public interface. Follow the Discovery Community Center to monitor their release schedule.

3. Apply changes – Once this is selected, License Manager will begin analyzing all your licenses and their associated collections. The criteria used will be whether the license is currently active and also whether the collection found is on only a single license or multiple licenses.
The final page of the wizard gives you an indication of License Manager’s progress towards writing the new public notes to your knowledge base collections. In the below example, the public notes were applied to 23 collections successfully.

1. The “Apply Template” button allows you to run the wizard once more and alter, append, or erase existing public notes. There is also an indicator for the last time the template was applied.

2. The “Public Notes Template” section displays the most recent template created and applied to your licenses.

The accordion “Collections Affected by Template” illustrates the most recent edits applied to your licensed collections.
1. “View public notes text” indicates the terms of use applied to a given collection. License Manager analyzes each license and only appends the terms of use in play for a given license. The descriptive text is applied to all collections.

2. The collection link will take you to the Collection Manager interface to allow you to manually edit collection details.

3. “View License” takes you to the license where the indicated collection is associated.

The “Collections Not Affected by Template” accordion displays collections that were not affected by the most recent template write action. There are two tabs available:

1. “Collections In More Than One License” displays those collections where a single license could not be found. In this instance, human intervention is required to choose which license has ownership of the collection, so the appropriate term notes can be applied.
2. By clicking the “View License” link, License Manager will show all licenses that contain the indicated collection. You can then apply the template from that one license, thereby assuring the collection has the proper term notes.
1. The “Collections With Existing Content” tab displays those collections that were not affected by the template because the option to “Protect existing content in collection-level public notes” was selected.

2. Use the available turn buckles to expand both “Existing Public Note Content” and “Proposed Template Content.”

3. If the proposed template content is preferred, select the row and then select the button to “Overwrite with Template Content.”

Alternately, collection public notes can be edited directly from a license through the Collections accordion.
1. For each collection, expand the “View public notes text” to see what is currently within the collection public note.
2. If a change is desired, select the collection row.
3. The “Update Public Notes” button will launch the public notes wizard once again, but this time will only allow you to add the terms found within the license currently opened.
Download Terms of Use Search output in CSV

By request, License Manager now allows for the download of a results set found via a terms of use search.
Titles added to both bookmarks and document uploads

By request, License Manager now allows for labels to be added to both documents and bookmarks uploaded to a license or a template. This allows you to differentiate between documents and bookmarks, which can have similar file names.
Collection select status indicator added within Collections accordion

By request, License Manager will now show the status of a collection found within the collections accordion dropdown. Previously it was difficult to differentiate between those collections which were shared to a library but had not been selected.
Bug fixes

- A bug was fixed which was converting a shared license to an individually owned license once the shared-to library withdrew from the share. Now withdrawing from a share will remove the shared license entirely as expected.
- Shared licenses which are left in their “pending” state will no longer appear as ILL=Yes or No to the ILL platforms until they’ve been either accepted or rejected.
- When a license is either created or activated after the license start date, and the option to automatically select associated collections is enabled, the collections will now be set as selected even though the start date is in the past.
- The search by licensor feature within license templates has been optimized to correctly show all providers.
- The CSV export of licenses now correctly shows term qualifiers which were missing previously.

Selected collections are now indicated with a green check mark.
• The usage cost analyzer within a license history will now show correct “duplicate reports” and “missing reports” values regardless how of vendor sources have been combined.
• A bug was fixed which was causing the “renewal approaching” alert to announce renewals on licenses which had already been renewed.
• The license history of edits has been improved to now include the license start date.
• License input fields now include a description to improve accessibility for screen reading software.
• The message provided by the SUSHI credentials test mechanism has been improved to notify users the vendor timed out and that testing can continue by requesting a one-time or monthly report harvest.

Please use the discussion forum for License Manager to discuss any issues you encounter, or contact support at support@oclc.org.

The License Manager discussion forum on the OCLC Community Center: https://www.oclc.org/community/discuss/manager.en.html

Known issues

• None at this time.

Future Release

• Editable shared licenses for groups
• License title tracking
• Support for a public feedback form for Trial Databases

Feature Roadmap

The roadmap for WorldShare License Manager can be found on the OCLC Community Center.

OCLC project staff regularly review this list and update the features and timing information.

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