WorldShare Reports release notes, October 2018

Last updated: Mon, 08 Oct 2018 14:27:52 GMT

Introduction

Review these sections to see the new features, enhancements and bug fixes for this release:

- New features and enhancements
- Reporting updates
- Other considerations
- Bug fixes

Important links are also available.

New features and enhancements

WMS group cataloging reports

Group cataloging reports are now available in WMS Report Designer.

WMS Groups can use the tools available in WMS group cataloging reports to monitor your group's activity within WorldShare Record Manager.

In order to use this functionality:

- Your group must be set up as a WMS Group.
- All group member institutions must be Report Designer customers.
- Your group must designate administrators. Group report administrators will see all data for the group (e.g., Circulation Administrators will see all patron and circulation data across the group). Please confirm your WMS Group leadership is aware and accepting of this functionality.

If the above prerequisites are met and your group wishes to pursue WMS Group reporting, please contact analyticsfeedback@oclc.org. The OCLC Analytics team will be responsible for applying the necessary roles in order to allow the admin user to perform group-level reporting. OCLC Analytics will provide additional information about running these reports and understanding the output.

If your group has already enabled group reporting and wishes to add group cataloging reports, please contact
Group Data Last Refresh Date

This report shows the latest date that the group cataloging data was last updated.

<table>
<thead>
<tr>
<th>Source Data</th>
<th>Last Data Refreshed Date</th>
<th>Reports</th>
<th>Data Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cataloging</td>
<td>2018-09-06 16:41:16 EST</td>
<td>• Title Holdings Count By Institution</td>
<td>Monthly on the 1st of the month, after successful load, data will be &quot;as of&quot; the end of the previous calendar month.</td>
</tr>
<tr>
<td>Group Activity</td>
<td>2018-09-07 07:30:35 EST</td>
<td>• Court of New and Removed Group Titles</td>
<td>Monthly on the 1st of the month, after successful load, data will be &quot;as of&quot; the end of the previous calendar month.</td>
</tr>
<tr>
<td>Group Titles</td>
<td>2018-09-07 01:45:40 EST</td>
<td>• Title Counts for Group Catalog Report</td>
<td>Monthly on the 1st of the month, after successful load, data will be &quot;as of&quot; the end of the previous calendar month.</td>
</tr>
<tr>
<td>Institution Title Holdings</td>
<td>2018-09-27 10:32:49 EST</td>
<td>• Titles Held by a Single Institution</td>
<td>Daily, after successful load, data will be &quot;as of&quot; the end of the previous calendar day.</td>
</tr>
</tbody>
</table>

Count of New and Removed Group Titles

This report provides the combined count of new and removed titles as well as the net change in the title holdings activity for the group by Month, Year.
Title Counts for Group Catalog Report

This report provides the combined count of titles held by the group by Month, Year and by Material Format.
Title Holdings Count by Institution

This report provides the count of titles held by individual members of the group by Month, Year.
Canadiana and LC Name Authorities added to Record Manager Action reports

Libraries can now view statistics for Canadiana and LC authority record actions in the Daily and Monthly Record Manager Actions Reports.

For more detail, the hyperlinked data type can be clicked to drill down to show information based on specific actions.

For more information regarding these authorities, see Record Manager authority records.

**Canadiana Authority Record Actions**

Authority Records-Canadiana includes the following actions:

<table>
<thead>
<tr>
<th>Action</th>
<th>Institution Symbol</th>
<th>2018-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Canadian Authority Record</td>
<td>OCWMS</td>
<td>2</td>
</tr>
<tr>
<td>Browse for Canadiana Authority Record</td>
<td>OCWMS</td>
<td>1</td>
</tr>
<tr>
<td>Delete Canadiana Authority Record</td>
<td>OCWMS</td>
<td>1</td>
</tr>
<tr>
<td>Export Canadiana Authority Record</td>
<td>OCWMS</td>
<td>5</td>
</tr>
<tr>
<td>Replace Canadiana Authority Record</td>
<td>OCWMS</td>
<td>2</td>
</tr>
<tr>
<td>Search for Canadiana Authority Record</td>
<td>OCWMS</td>
<td>6</td>
</tr>
</tbody>
</table>

**Library of Congress Authority Record Actions**

Authority Records-LC includes the following actions:

<table>
<thead>
<tr>
<th>Action</th>
<th>Institution Symbol</th>
<th>2018-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add LC Authority Record</td>
<td>OCWMS</td>
<td>5</td>
</tr>
<tr>
<td>Browse for LC Authority Record</td>
<td>OCWMS</td>
<td>69</td>
</tr>
<tr>
<td>Export LC Authority Record</td>
<td>OCWMS</td>
<td>7</td>
</tr>
<tr>
<td>Replace LC Authority Record</td>
<td>OCWMS</td>
<td>2</td>
</tr>
<tr>
<td>Search for LC Authority Record</td>
<td>OCWMS</td>
<td>56</td>
</tr>
</tbody>
</table>

**Institution Symbol added to the Circulation Fiscal Transactions Universe**

The following Institution Symbol objects have been added to the Circulation Fiscal Transactions universe:

**Fiscal Transaction Details folder:**

Fiscal Transaction Institution Symbol
Fiscal Last Modified Institution Symbol
Fiscal Transaction Item folder:

Item Owner Institution Symbol
Item Primary Institution Symbol
Fiscal Transaction Patron - Account Information folder:

Patron Institution Symbol

Institution Symbol added to the Circulation Scheduled Items Universe

The following Institution Symbol objects have been added to the Circulation Scheduled Items universe:

Scheduled Item folder:

- Item Owning Institution Symbol
- Item Primary Institution Symbol
Scheduled Patron - Account Information folder:

Patron Institution Symbol
Reporting updates

**Improved performance when refreshing data for four Cataloging Universe Objects**

Performance has been improved when refreshing a list of values for the following objects when creating a query in Report Designer in the Cataloging Universe:

**Title Holding Information folder:**
- Material Format
- Material Subformat

**Volatility folder:**
Circulation Item Inventories Item Cost

The Circulation Item Inventories FTP report will now retain Item Cost for withdrawn items.

<table>
<thead>
<tr>
<th>P</th>
<th>Q</th>
<th>R</th>
<th>S</th>
</tr>
</thead>
<tbody>
<tr>
<td>4025</td>
<td>LHR_Item_Cost</td>
<td>LHR_Item_Nonpublic_Note</td>
<td>WITHDRAWN</td>
</tr>
<tr>
<td>44025</td>
<td>USD 25.00</td>
<td>LHR_Item_Public_Note</td>
<td>WITHDRAWN</td>
</tr>
<tr>
<td>78215</td>
<td>USD 25.00</td>
<td></td>
<td>WITHDRAWN</td>
</tr>
</tbody>
</table>

Bug fixes

Extraneous titles included in the WorldCat knowledge base - Collection Overlap Detail Report

Prior to this this release, the WorldCat knowledge base - Collection Overlap Detail Report included items without OCLC numbers or titles in the last section of the report. Now, the report will not include this extraneous section.

Other considerations
Ability to Add a Privacy Notice for Staff and Patrons

Institution administrators can now request OCLC to add an institution-defined privacy notice to the staff and patron login step for many OCLC services including WorldShare Reports.

If you add a privacy notice, it will be displayed after the staff or patron is presented with their login screen. The number of times the privacy notice is displayed is based on the timeframe configured for the institution.

To request the addition of a privacy notice for your institution, please contact OCLC Support in your region.

To illustrate an example, below are three screenshots that show the sequence for displaying the privacy notice. Once you login (first screenshot) you are presented with the privacy notice (second screenshot). Once you click Continue, or if Continue is not selected after 40 seconds have passed, you progress to your application (third screenshot).
Important links

Support website(s)

Support information for this product and related products can be found at:

- WorldShare Reports
- OCLC Community Center
• Browser compatibility chart