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>
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<tbody>
<tr>
<td>None</td>
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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>
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<tbody>
<tr>
<td>None</td>
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Browser support

This release was tested with the following browsers:

- Chrome Version 70.0.3538.77
- Firefox 63.0
New features

COUNTER report uploads in CSV / TSV format

By popular request, WorldShare License Manager now allows you to manually upload a select number of COUNTER 4 reports in spreadsheet format, in addition to XML format. While all report formats will be supported in upcoming releases, this first iteration includes support for the following list of journal, collection, and book reports:

- Journal Reports: JR1, JR1a, JR2, JR3, JR3 mobile, and JR5
- Collection Reports: DB1, DB2, and PR1
- Book Reports: BR1, BR2, BR3, BR4, BR5

![WorldShare License Manager interface](https://help.oclc.org/Library_Management/WorldShare_License_Manager/Release_notes_and_known_issues/201...)

Currently supported browsers can be found [here](#).
Improved License Search Interface

The search boxes for the Licenses, Templates, and Usage Data menus will now automatically expand to accommodate search terms longer than the default left-side search form.

![Image of expanded search boxes]

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 License Manager.

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 on ‘Continue’
or if ‘Continue’ is not selected after 40 seconds have passed, then you progress to your application (third screenshot).
Bug fixes

• A bug was corrected that was preventing a license search for shared licenses which included a local edit to the share
• An issue was corrected which was preventing license searches against license comments to link correctly to the appropriate license
• Errors associated with the “general” section of licenses will now display correctly
• Read-only users (role = ERM_STAFF) will no longer be able to extend a delete date for harvested COUNTER report files
• The manual import of XML COUNTER reports is now more flexible, and will allow spreadsheet-style report names (i.e. “Journal Report 1 (JR1)”) in addition to the XML-required report names

Please use the License Manager’s discussion forum to discuss any issues you encounter or contact OCLC Support.

Known issues

• When a license is shared to another library and the “Automatically select collections when activated” option is selected, the library being shared to will still need to manually select the collections affected by the license. This will be corrected in an upcoming release.

Future Release

• Additional support for COUNTER 4 CSV, TSV, and XLS report uploads
• Ability to analyze COUNTER report coverage
• Ability to summarize COUNTER report totals for a single report metric type
• Support for public exposure of, and feedback on, Trial Databases
• COUNTER 5 support
• Tracking of historical title coverages for collections associated with licenses

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.

Notices

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