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 at this time</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>None at this time</td>
</tr>
</tbody>
</table>

New Features

New COUNTER harvest summary with report calculator and coverage display

A new “Harvest Summary” display has been added to the Usage Data menu which allows you to generate a sum total of
metric types across all COUNTER 4 reports harvested from publishing vendors. Additionally, this new display indicates any missing reports from your collection of available vendors.

The “Generate Harvest Totals” calculator will analyze your harvest history for the report type, date range, and metric type(s) you request. After analyzing all COUNTER reports in your harvest history, it will return a single sum total useful for global usage reporting.

Because the sum total across all reports is only valid if all reports have been harvested, a new “View Report Coverage” button has been added to visually give you an idea if you have all the reports you need or if some months need to be re-harvested.
Missing reports

If a report month is missing for a given vendor, clicking on the “missing” or “no usage” text will allow you to re-harvest that missing month in one of two ways:

1. For “Manual” harvest configurations, you’ll be taken to the one-time harvest screen with the vendor and report type preselected
2. For “SUSHI” harvest configurations, you’ll be shown a dialog box to automatically request the missing month from the pre-configured SUSHI vendor

COUNTER report uploads in CSV, TSV, and XL 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. The complete list of COUNTER 4 report types which are available for upload in CSV, TSV, and XLS include:

- JR1, JR1 GOA, JR1a, JR2, JR3, JR3mobile, JR4, JR5, DB1, DB2, PR1, BR1, BR2, BR3, BR4, BR5, MR1, MR2, TR1, TR1mobile, TR2, TR3, TR3mobile

Group licenses now include the ability to auto-select collections

Libraries with WMS’s group functionality who share their licenses with other libraries can now mark a license as “Automatically select collections when activated.”

https://help.oclc.org/Library_Management/WorldShare_License_Manager/Release_notes_and_known_issues/201...
When a license with automatic selection is shared, there are two scenarios to keep in mind for libraries which choose to accept the share:

1. If the license is in “pending” status, i.e. has not come into effect, the library being shared to can accept the share and trust the collections will be automatically selected once the license becomes active. Collections can still be deselected in Collection Manager at any time.

2. If the license being shared is currently in effect, i.e. the license is active and the start date is in the past, the library being shared to can accept the share with their collections automatically selected or bypass the selection of collections in favor of manually selecting them within Collection Manager.

**Improvements and Bug fixes**

- Minor interface update to the SUSHI harvester to display date ordinals correctly (i.e. 23rd, etc.)
- Harvest history search results were updated so that it’s possible to sort by harvest history dates in all cases
- Manual upload of COUNTER reports in CSV, TSV, and XLS were updated to allow for report names without braces;
The export to CSV button is now working from the license search results page.
The error message which appears when an incorrectly formatted COUNTER XML file is attempted now includes an updated URL to the COUNTER 4 standards as a reference.
For those SUSHI vendors which require the OCLC IP addresses, the list of IPs have been shortened. No action is needed for current configurations as no new IP addresses have been added.
The Harvest History search results screen now has a “reset” button to clear any selected filters.

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

Known issues

• None at this time

Future Releases

• 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.

Release Overview

To help you become familiar with the new features, enhancements and improvements included in this release, there is an update sessions 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 License Manager release overview session

Date: February 11, 2019, 11:30 am (EST)

Registration: https://oclc.webex.com/oclc/j.php?MTID=mc9626e46f4ba7d89178c7240849b9a2b

Support website(s)

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

https://help.oclc.org/Library_Management/WorldShare_License_Manager/Release_notes_and_known_issues/201...
• WorldShare License Manager
• Contact OCLC Support
• OCLC Community Center
• Browser compatibility chart