WorldShare License Manager release notes, May 2019

Release Date: May 04, 2019

Introduction

This release of WorldShare License Manager provides a new Trial License Survey with response goal tracking in addition to minor bug fixes. These features will help you manage trial workflows, including:

- A trial license survey which can be embedded on your library web pages
- Response goal tracking functionality to alert you when a minimum number of responses have been received
- Visualization of trial license response rates on each trial license

These new feature is the direct result of your feedback.

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.
New features and enhancements

Trial License Survey with Response Goal Tracking

License Manager now enables you to easily publish a survey on your library’s website which lists all currently available trial databases and then securely collects ratings and feedback from your library’s users. With this new survey feature, your library now can manage the survey process more easily and establish a trusted point of access for all library-sponsored database trials. Benefits of this survey include:

- **Secure API connection** from a remote library web page which lists all currently active collections and writes user responses back to the license within License Manager
- **Customizable survey categories** including user roles, rating values, and a free-text comment field from which to gather user feedback on individual collections
- **A unique and customizable “Response Goals” feature** to alert the survey’s creator when predetermined response totals have been met for a trial
- **Response summary visualization and details** from gathered survey data

1. Create your survey

To take advantage of this new feature, you can first create a survey using the “Trial Licenses” wizard under the “Licenses” left-hand navigation within the interface. From there, user-selected roles and a five-star ratings system can be customized to local standards.
2. Set response goals

Response goals are an optional feature and can be used to notify the survey's creator whenever a pre-determined sum of user-role responders take the survey. When used, these response goals apply to all database trials.
3. Establish a secure connection between your library’s website and License Manager

To establish a secure connection from your website(s) to License manager, it’s necessary to first configure the website domains to be used for your trials. With this list of domains, License Manager creates a secure WSKEY which is then used to read from, and write to, WMS.
4. Create survey code

While this list of active domains can be changed at any time, only one WSKEY is used for the entire list of domains. This means any changes to the list will require that you update your library webpages with new survey code and associated WSKEY. Use the “Create Survey Code” button to have License Manager generate your survey code which can then be pasted into the web page domains you registered.
The survey code is designed to work with any HTML page or Content Management System (CMS) which accepts JavaScript and iframe embed codes.
The finished survey lists all collections, collection links, and public notes associated with active trial licenses found within License Manager.
# LICENSE TRIALS

Please give us feedback on the following license trials.

## Current Database Trials

- Taylor & Francis Media, Cultural & Communication Studies Collection
- Wiley Online Library Tribology Backfiles
- EBSCO E-Journals

This resource provides users with access to your library’s e-journals subscriptions via the EBSCOhost interface, bringing visibility to and increasing usage of your entire e-journal collection.

## Review Database

*Required Field

**Database**

- **EBSCO E-Journals**

**Your Role**

- **Students**

**Your Rating**

- Low 🌟🌟🌟🌟 High

**Comments**

I was able to find what I was looking for.

[Submit button]
5. Review survey data and “Add to Order”

Trial licenses now include a new section, titled “Survey Data”, which summarizes any survey responses collected by the externally hosted surveys. If response goals are being used, the current total of responses from each respondent role are summarized on this page. From this page it's possible to select “Add to Order” which gives you the opportunity to add the collection surveyed to either a new or existing order. The cost data can be edited from this page and is informational only.
The “Reviews” tab within the “Survey Data” section of the license lists all individual responses and any comments.
Once the initial survey is created, use the “Trial Licenses” button to view and manage your trial licenses. From this page you can view the website domains configured for your survey, all survey settings, and also a preview of the survey as it will appear on your library web pages.
All survey settings can be edited from the “Trial License Actions” dropdown. The survey embed code is also available from this dropdown as well and can be accessed by selecting “Copy Survey Code”.

**Note:** the “Trial Licenses” button is available only to WMS users with the ERM_ADMIN or ERM_SUPERVISOR roles. Those users with the ERM_STAFF role will not see this survey editing functionality but will see the surveys responses on individual trial licenses.
Bug fixes

- Elsevier ScienceDirect and Scopus SUSHI connections have been re-established due to report response formatting which was interfering with the WMS application. Any missing reports can be re-harvested once again.

Known issues

- The Trial License Survey currently only publishes in the English language. Additional languages will be provided in future releases.

Important links

Post release sessions

To help you become familiar with the new features, enhancements and improvements included in this release, there is an update session 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 Management Services release update session

Date: Wednesday, May 8, 2019 11:30 am EST (New York, GMT-04:00)

Register via WebEx

Support website(s)

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

WorldShare License Manager

- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart