WorldShare Reports Release Notes, August 2019

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Release Date: August 28, 2019

Introduction

This release of WorldShare Reports and Report Designer provides a number of new features and enhancements in addition to bug fixes. These features will help you manage more complex workflows, including:

• Utilize enhanced audit data in the Acquisitions Universe
• Utilize additional data in the Circulation Fiscal Transactions Universe
• Utilize additional data in the Circulation Events Universe

Many of these enhancements are 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. 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.

New features and enhancements

Utilize enhanced audit data in the Acquisitions Universe

You can now view an assortment of staff names and dates associated with workflow actions in Acquisitions and you now can track information about who completed certain tasks and when. Report Designer users also can choose to utilize these dates to track staff performance and evaluate turnaround times between steps in their respective workflows. For example, you could create a report to calculate the average time between receiving a copy and paying an invoice for purchases from a particular vendor and/or a given time period. These staff names and dates were previously unavailable in WorldShare Report Designer.

Copy Created Staff Full Name: The name of the staff member who created the copy.

Copy Received Staff Full Name: The name of the staff member who received the copy at the institution.

Copy Cancellation Staff Full Name: The name of the staff member who cancelled the copy.
Order Created Staff Full Name: The name of the staff member who created the order.

Order Last Modified Staff Full Name: The name of the staff member who last modified an order.
**Order Placed Staff Full Name:** The name of the staff member who placed the order.

**Order Item Created Staff Full Name:** The name of the staff member who created the order item.

**Order Item Last Modified Staff Full Name:** The name of the staff member who last modified the order item. This was renamed from Order Last Modified User.
**Invoice Created Staff Full Name:** The name of the staff member who created the vendor invoice.
Invoice Last Paid Staff Full Name: The name of the staff member who last paid the vendor invoice.

Invoice Last Unpaid Staff Full Name: The name of the staff member who unpaid the vendor invoice.

Invoice Item Created Staff Full Name: The name of the staff member who created the invoice item.

Invoice Item Last Modified Staff Full Name: The name of the staff member who last modified an invoice item.
Budget Period Created Staff Full Name: The name of the staff member who created the budget period.

Budget Period Last Modified Staff Full Name: The name of the staff member who last modified the budget period.
**Fund Created Staff Full Name:** The date and time when the fund was created.

**Fund Last Modified Staff Full Name:** The name of the staff member who last modified the fund.
**Master Subscription Created Date:** The date and time that a master subscription was created. The master subscription links together all order items that are renewals of each other.

**Order Created Date:** The date and time that the order was created.

**Order Item Last Modified Date:** The date and time the order item was last modified.

**Order Last Modified Date:** The date and time the order was last modified.
**Order Placed Date:** The date and time the order was placed. This was renamed from Order Date.

**Order Item Created Date:** The date and time the order item was created.
Query Panel

Universe outline

Acquisitions

Add Query

Order

- Last Claimed Date
- Last Invoiced Date
- Master Subscription Created Date
- Master Subscription Created Day
- Master Subscription Created Day Name
- Master Subscription Created Month
- Master Subscription Created Month Name
- Master Subscription Created Year
- Order Created Date
- Order Created Day
- Order Created Day Name
- Order Created Month
- Order Created Month Name
- Order Created Year
- Order Item Last Modified Date
- Order Item Last Modified Day
- Order Item Last Modified Day Name
- Order Item Last Modified Month
- Order Item Last Modified Month Name
- Order Item Last Modified Year
- Order Last Modified Date
- Order Last Modified Day
- Order Last Modified Day Name
- Order Last Modified Month
- Order Last Modified Month Name
- Order Last Modified Year
- Order Placed Date
- Order Placed Day
- Order Placed Day Name
- Order Placed Month
- Order Placed Month Name
- Order Placed Year
- Order Item Created Date
- Order Item Created Day
- Order Item Created Day Name

Query 1
**Invoice Last Modified Date**: The date and time a vendor invoice was last modified.

**Invoice Last Unpaid Date**: The date and time a vendor invoice was unpaid.

**Invoice Item Last Modified Date**: The date and time that an invoice item was last modified.

**Budget Period Created Date**: The date and time that the budget period was created.

**Budget Period Last Modified Date**: The date and time that the budget period was last modified.
Copy Cancellation Date: The date and time a copy was cancelled.

Copy Created Date: The date and time a copy was created.
**Fund Created Date:** The date and time when the fund was created.

**Fund Last Modified Date:** The date and time the order item was created.
Utilize updates in the Circulation Fiscal Transactions Universe

Use the new Fiscal Bill Note object

You can now use the Bill Note object when running reports in the Circulation Fiscal Transactions universe. The Fiscal Bill Note object is the Fiscal Bill Note associated with a fiscal transaction that provides additional information for other library staff, e.g., the reason that the bill was waived, canceled, or refunded, the interlibrary loan request associated with
Use PEND, a new Fiscal Action Type

This fiscal type represents a pending payment transaction, such as when a patron has self-paid using a credit card. This does not resolve an assessed bill and is informational only. A PEND Fiscal Action Type will link to one or more ASSESS transactions.
Use three additional Fiscal Transaction Details Fields

You can now use the following bill reason details in the Circulation Fiscal Transactions Universe:

**Fiscal Accounting Code:** The code associated with the reason for the fiscal transaction.

**Fiscal Tax Type Description:** The description of the tax type associated with the reason for the fiscal transaction.

**Fiscal Tax Type Code:** The code for the tax type associated with the reason for the fiscal transaction.

These 3 fields will only populate on Assess type transactions.
Utilize updates in the Circulation Events Universe

Utilize additional fiscal transaction data in Circulation Events

Additional fiscal transaction data has been added to the Circulation Events Universe. You can now utilize the following when creating report:

- **Pay-Bill-Pending** is now an available Event Type value (this corresponds to the PEND fiscal transaction described above for online payments)
- **EXTERNAL_PAYMENTS** is now an available Event Transaction Source value
**Event Bill Tax Rate:** The percentage that an institution must apply in taxes to a fiscal transaction.

**Event Bill Accounting Code:** The code associated with the reason for the circulation fiscal transaction.

**Event Bill Tax Type Description:** The description of the tax type associated with the reason for the circulation fiscal transaction.

**Event Bill Tax Type Code:** The code for the tax type associated with the reason for the circulation fiscal transaction.
As a Shared Print User, use metadata reports to track how many Shared Print Commitments you remove from your LHRs

As a shared print user, you can now see a count of the records where your library has removed its Shared Print commitment in the Record Maintenance Summary Report:
Please note that the row will only appear if the value is greater than 0. The Removed Shared Print Commitment action row will appear last in the report.

Details regarding Removed Shared Print Commitments will be added to the Monthly Local Holdings Record Maintenance Detail Report:

The detailed actions will still be grouped by Action Type. New rows for this action will appear last in the report, and will match the formatting for existing rows.

Text

**Bug fixes**

The Item Days in Transit and Item Days Overdue measures in the Circulation Item Status universe are now calculating correctly. Previously, the calculations were not reliable. This also affected the Items in Transit Report and the Overdue Items Aging Report.

**Known issues**

The Copy Cancellation Date field is not populating any data other than '01-01-0001'. This issue will be fixed in a future release.

A list of all current known issues is available [here](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2019_Release).
Support website(s)

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

- [WorldShare Reports](#)
- [Contact OCLC Support](#)
- [OCLC Community Center](#)
- [Browser compatibility chart](#)