Release Date: January 11, 2020

Introduction

In this release, License Manager enhances its alert functionality. We are pleased to add customizable alert lead-times for license about to expire and renewal approaching alerts.

License Manager continues its support for the COUNTER 5 usage statistics standard through the availability of additional report types. Reports offered this release include:

- DR_D2 – Database Access Denied

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.

| ACTION |

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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.
ACTION

• Consider changing the lead time for any renewal approaching alerts or expiration alerts you have currently configured. The default lead time is set at 2 weeks.
• The license renewal action has been moved from the general accordion tab in a license to the license action button. Please adjust your workflows accordingly.

New features and enhancements

Customizable Alert Lead-Time for License Renewals and Expirations

License Manager now enables you to quickly set custom alert lead-times for license renewals and license expirations. With this new feature, your library gains workflow flexibility by being able to choose the exact day you want to receive alerts notifying you of the Renewal Deadline and License End Date. The License End Date alert only applies to non-perpetual licenses with the status of current or pending. The Renewal Deadline alert only applies to non-perpetual licenses that do not have auto-renewals enabled and have the status of current or pending.

Enabling Customizable Alerts

To take full advantage of the customizable alerts for license renewals and expirations you will need to make sure that the following criteria is met:

• Ensure that application alerts are enabled, and users have been assigned to receive alerts. In order to take advantage of these new alert features go to Admin > Alerts Management > Licenses > Manage Licenses. Check to make sure the box “Enable application alerts” is checked and ensure that a user is listed next to About to Expire and Renewal Approaching.
• Since the “Renew By” date is not required when creating a new license, you will need to make sure to add one to any licenses you would like to receive Renewal Approaching alerts for.
Once the above steps have been completed, you will be able to add customized alerts for license renewals and expirations.

1. Setting up Alerts for a new License

The License Renewal and License Expiration alerts are not available to be configured until after a license has been created.
2. Navigate to the Terms of Use

After you created and saved a new license, or if you are logging into an existing license that was created before this release of License Manager, you can manage the duration of these new alerts underneath the Terms of Use accordion.

At the deployment of this release, all applicable licenses that were in existence will have received the End Date Approaching term of use. If there is a Renewal Deadline in the license, then the license will have received a Renewal Deadline Approaching term of use as well. The default time frame for new and created licenses with the terms of use appended to them is two weeks.

When you expand the Terms of Use accordion, you will see a new tab called “Notification Dates” that contains the terms of use for the added alerts.
3. Change the Send Alert time period

Once in the Notification Dates tab, you can change the lead time for when the alert will appear in WMS. You can choose to send the alert between 1-100 Business Day(s), Calendar Day(s), Month(s), or Week(s) before the license end date and license renewal deadline. These alerts must have a lead time that is before the creation of the license.

4. Remove Alerts
To ensure that you and your library have the workflow flexibility needed, you can remove the alerts from a license as easily as you have added them. All you need to do to remove one of the terms is click one of the red minus sign icons and save your license. This will remove the alert from the license.

**Additional COUNTER 5 Reports Available for Harvesting**

With License Manager, we continue to build on the adoption of COUNTER 5 across libraries. Statistics gathered from COUNTER-compliant vendors help to inform your decision making as you select and maintain your library’s e-resources. To date, License Manager accepts all COUNTER 4 reports from 121 vendors and select COUNTER 5 reports for 96 vendors.

With this release, we are happy to announce License Manager offers both automatic and manual harvesting of one additional COUNTER 5 report type. The following report is now available for harvesting in addition to the TR_J1, TR_J2, TR_B1, TR_B2, PR_P1, DR_D1:

- **DR_D2 – Database Access Denied**

Since COUNTER 5 is being deployed by many vendors, you may find it useful to visit [COUNTER.org](http://COUNTER.org) for a full description of the changes. License Manager will continue to update the list of COUNTER 5 supported vendor connections to ensure that your library has access to your usage statistics.

**COUNTER 4 and 5 Crosswalk**

As we continue to increase the number of supported reports and vendors for COUNTER 5, it is important to remember COUNTER 4 and 5 are distinct standards. The data is collated differently, and some caution should be used when comparing these numbers. [COUNTER.org has published compatibility guidance on their website](https://help.oclc.org/Library_Management/WorldShare_License_Manager/Release_notes_and_known_issues/202...), and with this release License Manager can combine “Database” results in a license’s history as illustrated in the following crosswalk:
Note: not all metric types translate between the two standards.

Improvements and Bug fixes

- Public Notes can now be separated by carriage returns, tabs, -- (double-dashes), * (asterisks), ; (semi-colons), and | (pipes). To implement this improvement, click “Apply Template” found within the “Public Notes Display” feature.

- The In-Progress status on the harvest history will now disappear after the harvest is finished and display the proper status.

- The bug resulting in duplicate harvest histories for the same vendors has been fixed and you will now only see one of the same vendor name per COUNTER type.

Please use the License Manager’s discussion forum to discuss any issues you encounter or contact support at support@oclc.org.

Known issues

- There are no known issues to report currently.

Important links
Post release sessions

To help you become familiar with the new features, enhancements and improvements included in this release, there is one update session scheduled. Please note the session time zones when registering. The session 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: Monday, January 13, 2020

Time: 11:30am EST (UTC -4)

Registration: Register Now

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