WorldShare License Manager release notes, February 2020

Introduction

In this release, License Manager enhances its COUNTER Vendor functionality. We are pleased to offer libraries the ability to request the addition of COUNTER SUSHI vendors inside License Manager.

License Manager continues its support of libraries and their adoption of the COUNTER 5 usage statistics standard. This release offers the addition of the COUNTER 5 SUSHI connections for Elsevier – Science Direct, Elsevier – Engineering Village, and Elsevier – Scopus.

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.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.
• The search box under the “Usage Data” has changed slightly. The check box that allowed users to toggle between showing all vendors and only configured vendors has been removed. Now, clicking the Search Button with an empty search box will present all vendors, configured and non-configured. If you wish to look at only configured or non-configured vendors, there is a new filter at the top of the table that will allow you to do that. Please adjust your workflows accordingly.

New features and enhancements

Request a Vendor Feature

License Manager now enables you to easily request the addition of a COUNTER SUSHI Vendor to License Manager. With this new feature, your library gains the flexibility to request a SUSHI Vendor connection directly inside WMS instead of needing to break your workflow by sending an email request to OCLC. This new feature applies to both COUNTER 4 and COUNTER 5 vendors.

1. Requesting a New Vendor

In order to request a new SUSHI Vendor connection in License Manager you will start by navigating to and clicking on the Usage Data tab inside License Manager.
2. My Requested Vendor Tab

After expanding the Usage Data, click the search button underneath the box titled Search Available Sushi Vendors. Clicking the “Search” button while either the search box is empty or if it contains a query will bring up a page with two tabs. The first tab is called “Available SUSHI Vendors”. Next to the tab labeled “Available SUSHI Vendors”, a second tab will appear next to it called “My Requested Vendors”.
Click on the “My Requested Vendors” tab and you will be brought to the following screen.

3. Request a New Vendor

On the My Requested Vendor tab you will see a button called “Request a Vendor”. Clicking on this button will bring you to a new screen where you will enter information about the SUSHI Vendor Connection you are trying to add. Fields with the red asterisks are mandatory fields.
Definitions of the Fields on Request a Vendor Screen

**Vendor Name** – This field is connected to the WMS Vendor Information Center, shown on your screen as “Vendors” on the left-side navigation. For this field you will look up the vendor you wish to add using the search box. You might have to type the whole name to get it to appear. If you cannot find the vendor you wish to add, you will need to go to the Vendors tab in the left-hand navigation and Click the “New Vendor” button to create a new vendor.

**Provider ID** – This field contains the Collection Manager Unique Identifier for this vendor. You can find this by consulting the collection you want on either a new or existing license. This can be found when you are view the ‘Collections’ tab of a license.
SUSHI Server URL – This field contains the URL of the COUNTER SUSHI API for the vendor you are trying to request. It is different than the URL of the vendor’s main webpage and will look something like this: https://sushi5.scholarlyiq.com/counter/r5/reports.

Special Considerations – If the vendor you are trying to request requires IP ranges when enabling harvesting from OCLC, you can find these IP addresses here.

Version – This is where you will choose which COUNTER type you would like to setup the vendor for.

Report Type – Here you can select the report types you wish to have enabled for the vendor. The list will change depending on if you selected COUNTER 4 or COUNTER 5 as the version.

Credentials – These fields are where you will enter your library’s SUSHI credentials so that License Manager can test the vendor connection you are requesting. For COUNTER 4 connections, the Requestor ID and Customer ID fields are required. For COUNTER 5, only one of the fields for API Key, Requestor ID or Customer ID fields are required to test.

4. Test & Save a New Vendor Request

After entering in the required information for the connection you will then click the test & save button at the top of the screen to submit your vendor request. After you click the Test and Save button, the vendor connection will be tested with your credentials. If the vendor you have requested tests successfully, you will receive the appropriate message at the top of the screen.
5. Request Approved or Denied

Once your request is submitted, it will be reviewed by the License Manager team. If your request is approved, it will be added to the list of Available SUSHI Vendors. If you are the institution who submitted the request, the vendor will be already configured for you once it is approved. This will help save you time and ensure you won’t have to enter your credentials multiple times. If the request is declined, you will be presented with a reason as why it has been declined and given the opportunity to resubmit the request.
6. Alerts

In order to help you and your library keep track of any SUSHI Vendor Requests you submit, License Manager has also enabled the option for your library staff to be sent an alert inside WMS when a Vendor Request has been either approved or declined. Configuring these alerts takes place under the Licenses – Harvest Usage Data section of the configure alerts page.

Addition of Elsevier COUNTER 5 SUSHI Connections

With this latest release, License Manager continues its support for libraries as they transition to the COUNTER 5 usage statistics standard. Due to a compatibility issue between the Elsevier SUSHI server and the License Manager SUSHI
harvester, users have been unable to conduct successful COUNTER 5 SUSHI harvest for Elsevier – Science Direct, Elsevier – Engineering Village, and Elsevier – Scopus. With this latest release of License Manager, libraries are now able to successfully conduct COUNTER 5 harvests for these Elsevier Platforms.

1. Turning on COUNTER 5 Harvests with Elsevier

In order to enable COUNTER 5 harvesting for your institution, you will need to fill out this form: https://dev.elsevier.com/img/Elsevier-SUSHI-COP5-application-form_0.6.docx and send it to the helpdesk of the Elsevier Product you are attempting to harvest against (Scopus, Engineering Village, Science Direct). In addition you need to let them know that ‘SUSHI-OCLC-WMS’ needs to be enabled on your account. After you complete this, Elsevier will send you the requestor_id, customer_id and platform information. Once you receive these credentials from Elsevier you will be all set to configure the COUNTER 5 SUSHI connection on License Manager.

2. Configuring an Elsevier COUNTER 5 connection in License Manager

After receiving the required information from Elsevier, you can go the Elsevier COUNTER 5 Connection you want to configure and fill in the information sent to you by Elsevier. Requestor ID will go in the Requestor ID field and Customer ID will go in the Customer ID field. For the API Key field you will enter sd for the Science Direct connection, ev for the Engineering Village connection, or sc for the Scopus connection. Please note: entering the Elsevier platform into the API Key field is a temporary solution to accommodate Elsevier’s technical requirements. This procedure may change in the future, but we'll alert you prior to any alterations.

Improvements and Bug fixes

- The alignment for the date spinners under the End Date Approaching License Term and Renewal Deadline Approaching License Term has been fixed.
- The bug that was making the asterisk disappear from next to the End Date field when you viewed a license has been fixed.
Please use the License Manager’s discussion forum to discuss any issues you encounter or contact support at support@oclc.org.

Known issues

- There is a bug with COUNTER 5 recurring harvests user interface. Currently, after setting up a COUNTER 5 recurring harvest, when you go back to the vendor you set up the recurring harvest for to look at the reports being harvested, none of the checkboxes will be selected. Your harvests are still occurring each month but from this screen it will look like none are harvesting.

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: Wednesday, March 4, 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