WorldShare Reports release notes, June 2020

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Release Date: June 19, 2020

Introduction

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

- Utilize new LHR Duplicate Barcodes standard report
- Utilize new bibliographic fields added to the Cataloging universe, LHR Item Detail, Institution Title Holdings, Group Titles, and Group Activity universes
- Utilize new LHR fields added to the LHR Item Detail universe
- Utilize COUNTER 5 DR_D1 and DR_D2 usage data in new standard reports and custom reporting
- Utilize membership fee information in Circulation reporting
- Utilize additional fiscal data in the Circulation Events and Circulation Fiscal Transactions universes
- Utilize additional order/invoice and copy returned data in the Acquisitions 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. 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.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.
With this release of WorldShare Report Designer, the report objects COUNTER Vendor ID and COUNTER Vendor Name which had iterations in two different folders (COUNTER Title Usage and COUNTER Platform Usage) has now been combined into objects that make it easier to interact with objects and measures in all three of the different COUNTER usage folders. This change is something to keep in mind as you create custom reports in the E-Resources COUNTER 5 universe.

Note: If you have already created a custom report using these objects, you may need to update your report to utilize the object in its new location.

Old COUNTER Vendor ID and COUNTER Vendor Name objects
New COUNTER Vendor ID and COUNTER Vendor Name objects

A new LHR Duplicate Barcodes report is now available under Cataloging/Collection standard reports. This report now gives your library the ability to identify where a single barcode value has been used in multiple LHR items to help assist
your library in cleaning up LHR and Circulation data.

Utilize new LHR and bibliographic fields added to the LHR Item Detail universe

Users of WorldShare Report Designer can now view additional LHR item data in the LHR Item Detail universe, as well

https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2020_Releas...
as additional bibliographic data in the Cataloging universe, LHR Item Detail universe, Institution Title Holdings universe, Group Titles universe and Group Activity universe. This additional data was added to better support your library with the development and maintenance of your collection.

**LHR Item Data**

**LHR Acquisition Method:** Based on the 008/07 of the local holdings record representing how the institution acquires the item. The one character code is converted to the readable name, e.g., "Gift" for code g.

**LHR Electronic Location URI:** From the 856 $u of the local holdings record, the Uniform Resource Identifier (URI), which provides electronic access data in a standard syntax.

**LHR Former Shelving Location:** From the 852 $d of the local holdings record, the call numbers/shelf numbers where a resource was previously located.

**LHR Invalid or Cancelled Barcode:** From the 876-878 $r of the local holdings record, an invalid or canceled machine-readable piece designation (barcode).

**LHR Lending Policy:** Based on the 008/20 of the local holdings record representing the institution's external lending policy for the item. The one character code is converted to the readable name, e.g., "Will not lend" for code b.

**LHR Linkage Number:** Based on the 014 of the local holdings record, a concatenation of the 014 1st indicator (linkage type) and 014 $a (linkage number), representing a control number transferred from either field 001 (Control Number) or field 004 (Control Number for Related Bibliographic Record) of a holdings record.

**LHR Local Summary Holdings:** A statement summarizing the set of local holdings records associated with a bibliographic record. This can be generated by the system, or created manually.

**LHR Reproduction Policy:** Based on the 008/21 of the local holdings record representing the institution's reproduction policy for the item. The one character code is converted to the readable name, e.g., "Will not reproduce" for code b.
Bibliographic Data

Cataloging Language Name: Based the 040 $b of the bibliographic record representing the language of cataloging in the record. The three character code is converted to the language name as defined by https://www.loc.gov/marc/languages/language_code.html.

Encoding Level: From the leader/17 of the bibliographic record, the description to indicate the degree of completeness of the machine-readable (MARC) record.

Part-Section Name of Work: Part-Section Name of Work,"From the 245 $p of the bibliographic record, a name designation of a part/section of a work used in a title.

Part-Section Number of Work: Part-Section Number of Work,"From the 245 $n of the bibliographic record, the number designation for a part/section of a work used in a title.

Physical Description Extent: From the 300 $a of the bibliographic record, the physical description extent of the item.

Publication Place Code: From the 008/15-17 of the bibliographic record, the two to three character code representing the state or country of publication, production or execution.

Publication Place Name: Based on the 008/15-17 of the bibliographic record representing the state or country of publication, production or execution. The two to three character code is converted to the location name as defined by https://www.loc.gov/marc/countries/countries_code.html

Series Statement: From the 490 $a of the bibliographic record, a series statement for a series title, statement of responsibility, etc.

Uniform Title Added Entry: From the 730 $a of the bibliographic record, a preferred title used as an access point that may not be more appropriately assigned as fields 130, 630, or 830.

Uniform Title Main Entry: From the 130 $a of the bibliographic record, the preferred title access point used to bring together bibliographic entries for a work when various expressions or manifestations have appeared under different titles.

Universal Decimal Classification (UDC) Number: From the 080 $a of the bibliographic record, the number taken from the Universal Decimal Classification (UDC) scheme.
Utilize COUNTER 5 DR_D1 and DR_D2 data in new standard reports

New COUNTER 5 reports are available under E-Resources standard reports. These reports give you the ability to leverage the DR_D1 and DR_D2 data harvested in WorldShare License Manager by turning it into detailed reports to help your library with decision making. OCLC has published three new standard reports for your use. In addition, the E-Resources Data Last Refreshed report has been updated to include the COUNTER 5 data.

COUNTER 5 Database Usage Summary

The COUNTER 5 Database Usage Summary report provides a summary of your library's C5DR_D1 for a requested period of time. Summaries of usage by Vendor Name are provided for Database Automated Searches, Database Federated Searches, Database Regular Searches, Database Total Item Investigations and Database Total Item Requests. The COUNTER 5 Database Vendor Usage Detail report, which provides your library a detailed view of your library's C5DR_D1 data by database name by month, can be launched from this report.
# COUNTER 5 Database Usage Summary

**OCLC WorldShare Management Services - Library**

## Report Criteria:
- **Begin Date (YYYY-MM):** 2019-01
- **End Date (YYYY-MM):** 2020-05
- **COUNTER Vendor Name:** All

### Database Vendor Performance

<table>
<thead>
<tr>
<th>COUNTER Vendor Name</th>
<th>Database Name</th>
<th>Database Automated Searches</th>
<th>Database Federated Searches</th>
<th>Database Regular Searches</th>
<th>Database Total Item Investigations</th>
<th>Database Total Item Requests</th>
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<td>OR Test Vendor</td>
<td>JSTOR</td>
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<td>8,466</td>
<td>7,556</td>
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<tr>
<td>OR Test Vendor</td>
<td>Total</td>
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<td>2,087</td>
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<td>7,556</td>
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</table>

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COUNTER 5 Database Denials Summary

The COUNTER 5 Database Denials Summary report provides a summary of your library’s C5DR_D2 data for a requested period of time. Summaries of denials by Vendor name are provided for Database Limit Exceeded Denials and Database No License Denials. In addition, this report provides your library with a visualization of denials by vendor.
New COUNTER Database Usage Folder

A new COUNTER Database Usage folder is now available in WorldShare Report Designer. If you are a Report Designer customer this gives your library the ability to create custom reports based on the DR_D1 and DR_D2 data harvested by your institution in WorldShare License Manager.
Utilize membership information in Circulation reporting

View membership information in the Circulation Events Detail report

The Circulation Events Detail report has been updated to include new fields to help your library report membership information. The new fields that have been included in the report are Event Patron Membership Start Date, Event Patron Membership Expiration Date, Event Patron Membership Policy Name, Event Patron Membership Status.

Note: these fields will be associated with the new Event Type = "Start Membership"

Event Patron Membership Start Date: The date when a patron's membership fee was fully paid or waived, and the membership period began at the time of the event.

Event Patron Membership Expiration Date: The expiration date of the patron's membership period at the time of the event.

Event Patron Membership Policy Name: The name of the library's membership policy that applies to the patron's membership at the time of the event.

Event Patron Membership Status: The patron's membership status at the time of the event, e.g., Active, Pending, etc.
View membership information in the Patron Information Detail Report

The Patron Information Detail Report has been updated to include new fields to help your library report membership information. The new fields that have been included in the report are Event Patron Membership Start Date, Event Patron Membership Expiration Date, Event Patron Membership Policy Name, Event Patron Membership Status. This report also includes a new prompt for Patron Membership Start Date and Patron Membership Expiration Date, as well as a new input control from Patron Membership Status.

**Patron Membership Start Date:** The date when a patron’s membership fee was fully paid or waived, and the membership period began.

**Patron Membership Expiration Date:** The expiration date of the patron’s most recent membership period.

**Patron Membership Policy Name:** The name of the library’s membership policy that applies to the patron’s most recent membership.

**Patron Membership Status:** The patron’s membership status, e.g., Active, Pending, etc.
Utilize new membership information objects in WorldShare Report Designer

In addition to the updated Circulation Event Detail Report and Patron Information Detail Report standard reports, WorldShare Report Designer customers get access to patron membership information to use in customer reporting. This information is available in the following universes.

Circulation Events

In the Circulation Events universe, there are two sets of new membership objects available for use:

- The set which can be found in the Event Details folder is for use at the time of the event.
- The second set of new membership objects can be found in Account Information folder of the Event Patron folder. This set of objects is for current membership information.
Circulation Fiscal Transactions
Circulation Scheduled Items
Query Panel

Universe outline

Circulation Scheduled Items

Type here to filter on the tree

Circulation Scheduled Items [urx]
- Measures
- Dates / Time
- Schedule Details
- Scheduled Item
  - Personal Information
  - Contact Information
  - Account Information
  - Patron Bar code
  - Patron Blocked Flag
  - Patron Borrower Category
  - Patron Created Date
  - Patron Custom Category 1
  - Patron Custom Category 2
  - Patron Custom Category 3
  - Patron Custom Category 4
  - Patron Expiration Date
  - Patron Expired Flag
  - Patron Home Branch ID
  - Patron Home Branch Name
  - Patron ILL Approved Flag
  - Patron ILL Blocked Flag
  - Patron ILL Identifier
  - Patron ILL Patron Type
  - Patron ILL Pickup Location
  - Patron Institution ID
  - Patron Institution Name
  - Patron Institution Symbol
  - Patron Last Activity Date
  - Patron Last Modified Date
  - Patron Last Modified User
  - Patron Membership Expiration Date
  - Patron Membership Policy Name
  - Patron Membership Start Date
  - Patron Membership Status
- Patron Public Notes
- Patron Registration Date
- Patron Source System
- Patron Staff Notes
- Patron Suspended Until Date
- Patron User ID At Source
- Patron Verified Flag
- Patron Is Deleted

Result Objects

To include data in report
Run Query to return the

Query Filters

To filter the query, select
arrow. Select Filter to
users can select values

Data Preview
Utilize additional data in the Circulation Events universe

Use the new Event Pending Payment ID and Event Charging Institution objects.

You can now use the Event Pending Payment ID, Event Charging Institution Name, and Event Charging Institution Symbol objects when running reports in the Circulation Events universe. The Event Charging Institution Name, and Event Charging Institution Symbol objects have been added to WorldShare Report Designer to help your consortium report on paid library fees and which institution in your group charged the fees against a patron’s account. The Event Pending Payment ID object has been added to WorldShare Report Designer to help your library report on pending payments processed through an online payment processor.

The Event Charging Institution Name and Event Charging Institution Symbol objects replace Event Billing Institution Name and Event Billing Institution Symbol.

**Event Charging Institution Name:** The institution whose policies or staff created a bill against a patron’s account.

**Event Charging Institution Symbol:** The institution symbol for the institution whose policies or staff created a bill against a patron’s account.

**Event Pending Payment ID:** The identifier of the pending payment that was provided to the online payment processor.
Utilize additional data in the Circulation Fiscal Transactions universe

Use new Fiscal Charging Institution objects

You can now use the Fiscal Charging Institution Name and Fiscal Charging Institution Symbol objects when running reports in the Circulation Fiscal Transactions universe. These two objects have been added to WorldShare Report Designer to help your consortium report on paid library fees and which institution in your group charged the fees against a patron’s account.

**Fiscal Charging Institution Name:** The institution whose policies or staff created a bill against a patron’s account.

**Fiscal Charging Institution Symbol:** The institution symbol for the institution whose policies or staff created a bill against a patron’s account.
Utilize additional data in the Acquisitions universe

Use the new Return Reason and Copy Previous Returned Indicator objects

You can now use the Return Reason and Copy Previously Returned Indicator objects when running reports in the Acquisitions universe. The Return Reason is associated with copies of an order item and used to describe to library staff
the reason for an item being returned. The Copy Previously Returned Indicator displays whether or not a received item was previously returned to the vendor before being received. The feature utilizing both of these objects was made available in the April 2020 release of WorldShare Acquisitions.

Please note that only the base reason name will be displayed in WorldShare Report Designer.
Use the new Acquisitions order/invoice objects

You can now use the Payment Reference ID, External Order ID and External Invoice ID objects when running reports in the Acquisitions universe. The addition of these objects will help your library with reporting on information from external financial systems. The feature utilizing these objects was made available in the April 2020 release of WorldShare Acquisitions.

Payment Reference ID: Alphanumeric string representing the payment transaction ID (e.g. check number or bank transfer number) for an invoice. This value is often entered based on information from the institution's financial system.

External Invoice ID: Alphanumeric string representing an external financial system’s ID for a specific invoice in Acquisitions.

External Order ID: Alphanumeric string representing an external financial system’s ID for a specific order in Acquisitions.
In addition, objects previously in the Invoice Last Paid Dates folder have been renamed to Invoice Last Paid System Dates and a new set of date objects called Invoice Last Paid Staff Dates has been added. This change has been made to help your library better differentiate between when an invoice was marked by a staff member and when it was marked paid by the system.

**Old Invoice Last Paid Dates**
New Invoice Last Paid Staff Dates and Invoice Last Paid System Dates
Query Panel

Universe outline

Acquisitions

Type here to filter on the tree

![Image of Query Panel with highlighted nodes](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2020_Releas...)

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Bug fixes

• There was a long refresh time for the list of values for the Conspectus Division, Conspectus Category or Conspectus Subject objects in the Cataloging universe and LHR Item Detail universe. The list of values for these objects now will refresh quickly.

• The list of values for the Material Subformat object in the Cataloging universe was incorrectly displaying the list of Material Formats. Starting with this release you will see the correct Material Subformats when you refresh the list of values for this object.

Please use the Analytics' discussion forum to discuss any issues you encounter or contact support at support@oclc.org.

Known issues

There are no new known issues at this time.

A list of all other current known issues is available here.

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