WorldShare Reports release notes, August 2020

Last updated: Tue, 25 Aug 2020 15:37:07 GMT

Release Date: August 27, 2020

Introduction

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

- The addition of local data (LHR/LBD) Bulk Edit reporting to Metadata Reports
- Enhanced High Use Titles Report performance

Many of these enhancements are the direct result of your feedback.

Recommended actions

For this release, we recommend that you review the following checklist and complete the relevant task 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.

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>With this release of WorldShare Reports, the High Use Circulation Titles Summary report has been updated. If your library has scheduled this report, you may want to update your run of the report to take advantage of the new prompt.</td>
</tr>
</tbody>
</table>

New features and enhancements
Enhanced Metadata Reporting

This release of WorldShare Reports now enables libraries to run reports and retrieve statistics regarding their LHR and LBD data bulk edit activities conducted in WorldShare Record Manager. These bulk edit features were made available in previous releases of WorldShare Record Manager. Historical bulk edit activity will be loaded back to July 1, 2020.

Addition of the new Daily LHR Maintenance Summary report

A new metadata report called the Daily LHR Maintenance Summary Report has been added to the Metadata Reports accordion. This report enables your library to report on up to a 7 day timespan of local holdings records (LHR) added, deleted, moved, updated, and removed shared print commitments.

In addition, the names of the previously named Monthly Local Holdings Records Maintenance Summary Report and Local Holdings Records Maintenance Detail Report have been shortened to match the format of the new Daily LHR Maintenance Summary report.

Addition of the new Move LHR and Move LBD actions

The new Move LHR action and Move LBD action is now available to your library in the Metadata reports accordion. The Move LHR action can be found in the Daily LHR Maintenance Summary report and the Monthly LHR Maintenance Summary report. Users of these reports will also notice the phrase Local Holdings Records has been shortened to LHR in places.
The new Move LBD action can be found in the LBD Records drill-down of the Daily Record Manager Actions report and the Monthly Record Manager Actions report. Users of these reports will also notice the phrase Local Bibliographic Data has been shortened to LBD in places.
Addition of a new Update Bulk LHRs (Record Work Lists) report

A new Update Bulk LHRs (Record Work Lists) drill-down report is now available to libraries under the Metadata reports accordion. This report is designed to give your library's users the ability to see statistics for LHRs that were edited in bulk over a period of time. This report can be found as a drill-down report in the Daily LHR Maintenance Summary report and Monthly LHR Maintenance Summary Report.

This drill-down report gives your library a list of bulk LHR record work lists for the days or months that you selected. The report displays the Transaction ID, Record Work List Name, Edit Action, Status, Institution Symbol and the date. For each Transaction ID, you may see up to three (3) rows of statistics for the statuses tracked, i.e., Submitted, Updated, and Not Updated. Edit Actions will have a prefix of Base Script, Customized Script or Script Package. This report can be
exported to PDF or Excel.

Addition of a new Update Bulk LBDs (Record Work Lists) report

A new Update Bulk LBDs (Record Work Lists) drill-down report is now available to libraries under the Metadata reports accordion. This report is designed to give your library's users the ability to see statistics for LBDs that were edited in bulk over a period of time. This report can be found as a drill-down report in the Daily Record Manager Actions report and the Monthly Record Manager Actions report.
This drill-down report gives your library a list of bulk LBD record work lists for the days or months that you selected. The report displays the Transaction ID, Record Work List Name, Edit Action, Status, Institution Symbol and the date. For each Transaction ID, you may see up to three (3) rows of statistics for the statuses tracked, i.e., Submitted, Updated, and Not Updated. Edit Actions will have a prefix of Base Script, Customized Script or Script Package. This report can be exported to PDF or Excel.

Enhanced High Use Title Report performance

This release of WorldShare Reports makes an updated version of the High Use Circulation Titles Summary Report available to your library. This updated report returns complete results more consistently and gives your library’s users the option to modify the report query even further.
The addition of the 'Circulation Activity Count Greater than' prompt gives you more flexibility when searching for your library's high use titles. High volume institutions will want to utilize this prompt to avoid possibly hitting the 50,000 row limit. Also, this report is now configured to only return titles that have an OCLC number. Your non-bibliographic/temporary items will no longer be included in the results.

Circulation Activity Count is an aggregate measure of Items Checked Out + Items Renewed + Holds Fulfilled + Items Soft Checked Out. WorldShare Report Designer customers can take advantage of this new measure in the Circulation Events universe.
Bug fixes

There were no bug fixes in this release.

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 websites

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

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