WorldShare Reports release notes, September 2022

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Release Date: September 29, 2022

Introduction

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

- Utilize new reporting for COUNTER 5 journal article usage (IR_A1)
- Analyze circulation hold approval and item preparation activity
- Analyze hold forwarding activity for your circulation group
- Utilize new measures in circulation standard reports and custom reports
- Support for taxes and service charges entered by the amount on acquisitions invoices

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

Recommended actions

We encourage you to review all of the items in the release notes to determine whether other items 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 want to consider these items.

<table>
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<tr>
<th>ACTION</th>
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<tbody>
<tr>
<td>COUNTER 5 IR_A1 data files that have been previously harvested in WorldShare License Manager will now be available and represented in WorldShare Reports. If you have not yet harvested the IR_A1 file type, you may want to consider adding this task to your workflows.</td>
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https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2022_release...
New features and enhancements

New reporting for COUNTER 5 journal article usage (IR_A1)

WorldShare Reports will now ingest COUNTER 5 journal article usage from the IR_A1 file type, as harvested in WorldShare License Manager.

Updated COUNTER 5 item reporting

The existing COUNTER 5 Multimedia Usage Summary has been renamed to COUNTER 5 Multimedia/Journal Article Usage Summary and updated to include IR_A1 data. Previously the report only included data from the IR_M1 multimedia usage data source. This report now includes the C5IR_A1 as a COUNTER Source input control, as well as the inclusion of the new IR_A1 measures in the report table. The stacked bar chart visualization includes the Article Total Item Requests (IR_A1).

Additionally, the drill-through detail report COUNTER 5 Multimedia Usage Detail has been renamed to COUNTER 5 Multimedia/Journal Article Usage Detail and updated to include IR_A1 data. Previously the report only included data from the IR_M1 multimedia usage data source. This report now includes the new IR_A1 measures as columns in the report table.
The E-Resources COUNTER 5 universe has been updated to include data from the IR_A1 journal article source. This includes new fields in the COUNTER Item Usage folder:

- **Article Total Item Requests (IR_A1):** The total number of times the full-text of an item (i.e. Journal Article) was requested. Sourced from the IR_A1 report.
- **Article Unique Item Requests (IR_A1):** The number of unique full-text items requested in a user-session. Sourced from the IR_A1 report.
- **COUNTER Article Version:** The version of the article being accessed.
- **COUNTER Authors:** The person/people who created the publication of the article being accessed.
- **COUNTER Item DOI:** Digital Object Identifier that persistently identifies and facilitates access to a piece of intellectual property on a digital network, irrespective of its current location.
- **COUNTER Online ISSN:** The International Standard Serial Number (ISSN) is a unique eight-digit number used to identify an online periodical publication at a specific media type.
- **COUNTER Parent Article Version:** The version of the publication of the article being accessed
- **COUNTER Parent Authors:** The person/people who created the publication of the article being accessed.
- **COUNTER Parent DOI:** The digital object identifier given to the publication of the article being accessed.
- **COUNTER Parent Online ISSN:** The online ISSN of the publication of the article being accessed.
- **COUNTER Parent Print ISSN:** The print ISSN of the publication of the article being accessed.
- **COUNTER Parent Proprietary ID:** The unique identifier given by publishers to the publication of the article being accessed.
- **COUNTER Parent Title:** The title of the publication of the article being accessed.
- **COUNTER Parent URI:** The Universal Resource Identifier e.g., a URL or URN, for the publication of the article being accessed.
- **COUNTER Print ISSN:** The International Standard Serial Number (ISSN) is a unique eight-digit number used to identify a print periodical publication at a specific media type.
• **COUNTER Publication Date**: The date of release by the publisher to the customers of an item.

• **COUNTER Publisher ID**: The COUNTER publisher's unique identifier.

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**Circulation holds enhancements**

**Circulation hold approval and item preparation activity analysis**

Following on the release of circulation hold features for [holds approval and item preparation](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2022_release…), which allow you to manage materials that require special review or processing before patrons are notified that their requested materials are ready...
for use, WorldShare Reports now allows you to utilize new data fields in the Circulation Events universe for monitoring and analyzing this activity:

- **Holds Approved**: The number of hold approvals.
- **Holds Prepared**: The number of holds prepared.
- **Event Hold Approval Status**: Value that indicates if the item selected to fulfill the hold request needs to be approved by library staff before the patron is notified that the item is ready for pickup. E.g., NOT_REQUIRED, REQUIRED, PROVIDED.
- **Event Hold Preparation Status**: Value that indicates if the item selected to fulfill the hold request needs to be prepared by library staff before the patron should be notified that the item is ready for pickup. E.g., NOT_REQUIRED, REQUIRED, PROVIDED.

WorldShare Reporting also now allows you to utilize new data fields in the Circulation Hold Request universe for monitoring and analyzing holds approval and preparation activity:
• **Hold Approval Status**: Value that indicates if the item selected to fulfill the hold request needs to be approved by library staff before the patron is notified that the item is ready for pickup. E.g., NOT_REQUIRED, REQUIRED, PROVIDED.

• **Hold Preparation Status**: Value that indicates if the item selected to fulfill the hold request needs to be prepared by library staff before the patron should be notified that the item is ready for pickup. E.g., NOT_REQUIRED, REQUIRED, PROVIDED.

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**Analyze hold forwarding activity for your circulation group**

Following on the release of circulation hold features to allow you to forward holds for fulfillment by other branches of your institutions before requesting fulfillment from your circulation group, WorldShare Reports now allows you to utilize new data fields in the Circulation Events universe for monitoring and analyzing hold forwarding activity:

• **Event Hold Forwarding Level**: Value that indicates whether the pickup institution or the entire circulation group is eligible to fulfill a title-level hold. E.g., INSTITUTION, GROUP, or N/A.
New circulation measures and updated standard reports

New and updated circulation measures

Additional new measures have been added to the Circulation Events universe for easier analytics use:

- **Holds Completed**: The number of holds marked complete by library staff.
- **Memberships Started**: The number of library memberships that were activated in WorldShare Management Services (WMS).

Measures have been updated in the Circulation Events universe for more valuable analytics use, to include Item Consultations as a key circulation activity metric:

- **Circulation Activity Count**: The sum of Items Checked Out + Items Renewed + Holds Fulfilled + Items Soft Checked Out + Item Consultations.
  - This measure is utilized in the High Use Circulation Titles Report
- **Circulation Count**: The sum of Items Checked Out + Items Renewed + Items Soft Checked Out + Item
Consultations

- This measure is utilized in the Circulation Dashboard
Updated standard circulation reports

The Circulation Dashboard has been updated to include Hold Item Consultations as a key metric in the Monthly Circulation Activity and Circulation at Top 5 Shelving Locations quadrants of the report:

The High Use Circulation Titles Report has been updated to include Hold Item Consultations as a key metric of the report:
Support for taxes and service charges entered by the amount on invoices

Calculating per unit taxes and service charges on invoices when entered by amount

Associated with new features in WorldShare Acquisitions to allow users to enter taxes and service charges by amount on invoices, WorldShare Reports will continue to calculate and display Invoice Item Tax 1 Amount (Per Unit), Invoice Item Tax 2 Amount (Per Unit), and Invoice Item Service Charges (Per Unit) as per unit, regardless whether these values were entered on the acquisitions invoice as a percentage, per unit, or a total amount.
Support website(s)

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

- [WorldShare Reports](https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2022_release...)
- [Contact OCLC Support](#)
- [OCLC Community Center](#)
- [Browser compatibility chart](#)