



## WorldShare License Manager Release Notes

Release Date: May 14, 2016

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## 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 actions or decisions.

Action	Page Number
<input type="checkbox"/> Users who have subscribed to the alert “About to Expire” will need to re-subscribe to take advantage of a bug fix	Page 7

### 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	Page Number
<input type="checkbox"/> Licenses for media content can now be encoded with the new “Public Performance Rights” term of use	Page 4
<input type="checkbox"/> Vendor harvest configurations can now be tested with the vendor prior to scheduling harvests	Page 5
<input type="checkbox"/> All relevant vendors have been updated with new report types. Users should verify appropriate reports are configured within the Harvest Usage Data menu	Page 5
<input type="checkbox"/> Several new workflow alerts are available to subscribe to	Page 5

# Browser Support

This release was tested with the following browsers:

- Chrome Version 50.0.2661.94 m
- Firefox 46.0.1
- Internet Explorer 11.0.9600.18282

Currently supported browsers can be found at:

<http://www.oclc.org/support/documentation/browser.en.html>

# May 14 WorldShare License Manager Release

## New Features

### New Term of Use: Public Performance Rights

Users can now encode licenses with Public Performance Rights designations. This term of use will also appear in your library's WorldShare License Manager API.

**Public Performance** ☒ Yes ☐ No ☐ Silent

*Can Admission be Charged?*

☐ Yes  
☒ No

*Details*

151/1000

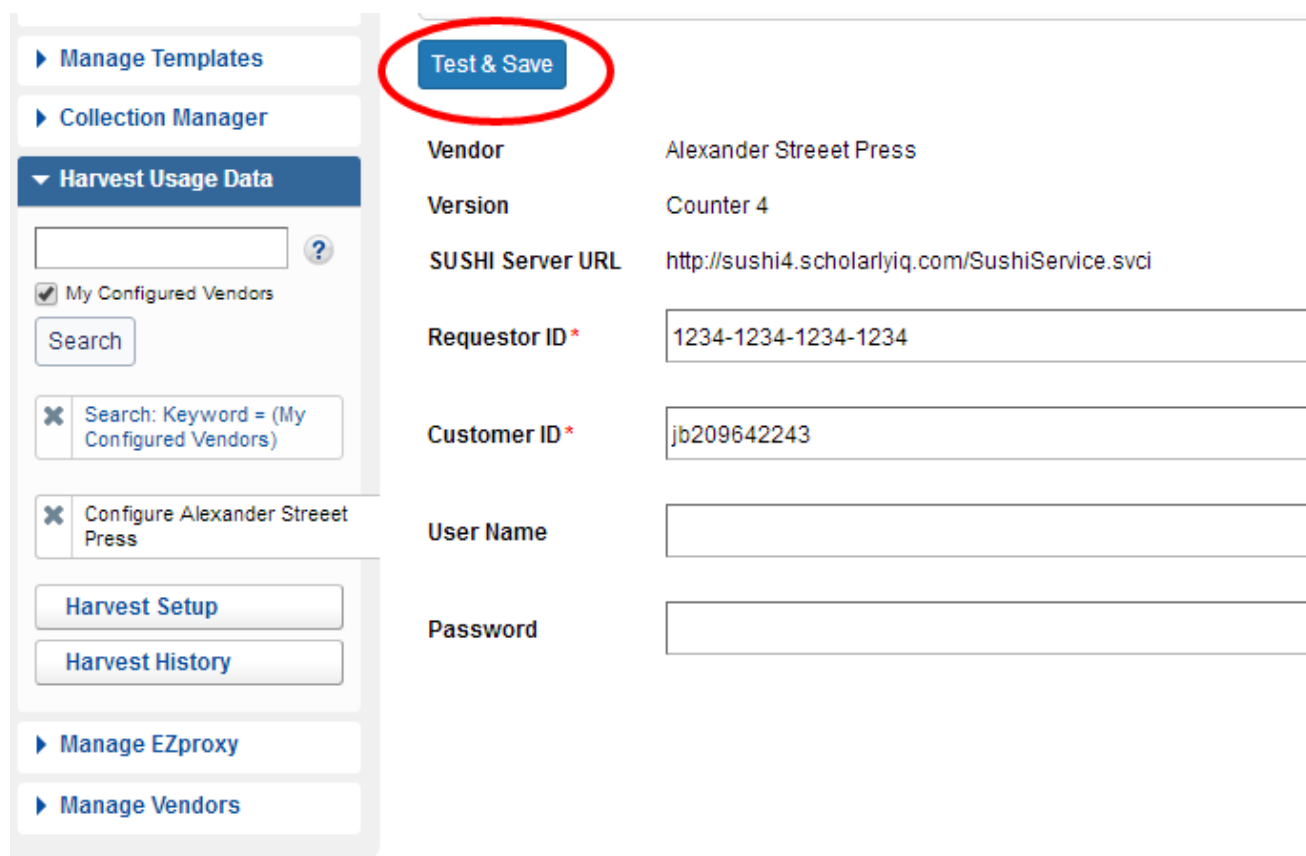
1. The use must be part of mediated instructional activities.  
2. The use must be limited to a specific number of students enrolled in a specific class.

[Add a Term Comment](#)

### Usage Report Harvesting: New Credential Testing

License Manager will now test your credentials prior to your saving those within a vendor's configuration. When saving credentials for the first time, a new button has been added called "Test & Save," which will pass the credentials to the vendor and wait for a response. If credentials are being edited, the button label is "Retest & Credentials." Possible outcomes for this new feature include:

1. Vendor configuration has been tested and saved successfully.
2. Vendor did not accept credentials provided. Contact the vendor or try again later.
3. Vendor connection timed out. Your credentials are saved, but you should retest them later.



The screenshot shows the WorldShare Admin interface. On the left is a sidebar menu with options: Manage Templates, Collection Manager, Harvest Usage Data (selected), Manage EZproxy, and Manage Vendors. The 'Harvest Usage Data' section is active, showing a search box, a checkbox for 'My Configured Vendors', a search button, and a list of configured vendors including 'Alexander Street Press'. Below this are buttons for 'Harvest Setup' and 'Harvest History'. The main content area displays a form for configuring a vendor. At the top of this form is a blue button labeled 'Test & Save', which is circled in red. The form fields include: Vendor (Alexander Street Press), Version (Counter 4), SUSHI Server URL (http://sushi4.scholarlyiq.com/SushiService.svc), Requestor ID\* (1234-1234-1234-1234), Customer ID\* (jb209642243), User Name, and Password.

## Usage Report Harvesting: New Report Types Added

Several new report types have been added to both manual and recurring (i.e., SUSHI) harvesting. The Harvest Usage Data functionality is now fully compatible with the following report types, depending only on the reports which a given vendor supports:

COUNTER 3: JR1, JR1a, JR2, DB1, DB2

COUNTER 4: JR1, JR1 GOA, JR1a, JR2, JR3, JR3 mobile, JR4, JR5, DB1, DB2, PR1, BR1, BR2, BR3, BR4, BR5, CR1, CR2, MR1, MR2, TR1, TR1 mobile, TR2, TR3, TR3 mobile

More information on reports can be found on the COUNTER Project website:

<http://www.projectcounter.org/>

## New Workflow Alerts

New alerts can be found within the Admin menu of WorldShare:

Licenses – Harvest Usage Data:

1. Harvest Status – this alert will notify subscribers every time a report harvest is requested from a vendor. The subsequent alert's "Open Item" button will then take the user to the vendor's harvest history page.



## Improvements

### New Instruction for “Authorized User” Term of Use

By request, the Authorized User term of use now includes an “Overseas User” instruction. This instruction is also visible via the license on the WorldShare License Manager API.

## Bug fixes

- Notes added to some terms of use can now be deleted if necessary
- Templates now show titles within the user interface while being edited
- Usage harvests can no longer be scheduled for prior to January 2000 to prevent vendors from being overloaded with requests for reports they can't supply
- Usage report harvests which trigger timed-out retries will no longer result in duplicate report harvest requests
- “About to expire” alert is now notifying subscribers correctly. Users will need to re-subscribe to this alert

## Known Issues

Please use the discussion forum for License Manager to discuss any issues you encounter, or contact support at [support@oclc.org](mailto:support@oclc.org).

The License Manager discussion forum on the OCLC Community Center:

[https://www.oclc.org/community/discussions/license\\_manager.en.html](https://www.oclc.org/community/discussions/license_manager.en.html)

### Licensors field may be empty

The “Licensor” field in License Manager maps directly to the collection field labeled “Provider” found in a WorldCat knowledge base collection. A WorldCat knowledge base collection’s provider field can be updated with entries from the global knowledge base list of providers. For providers of collections not represented in that list, we’re working on enhanced functionality to label licensor/providers.

OCCL WorldShare®

Need Help? LMANTeam

User support info

102 Metadata Acquisitions Licenses Circulation Analytics Admin

Collection: ABI/INFORM Archive Complete Cooperative Management Deselect Collection Save

Properties

Local Global

Collection Name \* ABI/INFORM Archive Complete

Collection ID \* ProQuest.AbiInformArchive

Provider Proquest

Data Version ProQuest (PQUEST)

Last Updated ProQuest K12 (bigchalk)

ProQuest Micromedia (micromedia)

ProQuest (Legacy Platform) (ProQuest)

Description

Notes Show Details

Collection Type

- ☐ Customizable
- ☐ Demand Driven Acquisitions
- ☐ Discontinued
- ☐ Document Delivery
- ☐ Open Access

The Provider field can be edited via "type down" provider search.

Linking

# Looking Ahead

## Future Releases

- Term-of-use interface upgrade
- New “Preferred” term of use designation for tracking “must have” terms
- New “Perpetual” license types
- Private License Templates
- New workflow alert for “Post-cancellation Access”

## Feature Roadmap

The roadmap for WorldShare License Manager can be found incorporated within the WMS roadmap:

<https://www.oclc.org/content/dam/support/wms/WMS%20Roadmap-2015-October.pdf>

OCLC project staff regularly review this list and update the features and timing information.

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