WorldShare Reports release notes, March 2019

Last updated: Wed, 27 Feb 2019 20:56:59 GMT

Release Date: March 5 & 6, 2019

Introduction

This release of WorldShare Reports provides several new features and enhancements in addition to bug fixes. These features include:

- The new Institution Title Holdings universe
- The addition of Canadian Subject Heading authority actions to Metadata Reports
- New objects in the Acquisitions and Circulation Item Status universes

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 may require action or decisions.

ACTION

Report Designer customers who have developed their own reports using the Source Transaction date objects may want to confirm their reports reflect the new naming convention for Item Last Seen Date. If the reports don't reflect Item Last Seen Date automatically, remove the Source Transaction date objects and replace with Item Last Seen objects.

Report Designer customers who have developed their own reports that utilize the Invoice Comment or Order Comment objects may want to confirm their reports reflect the new naming convention for Invoice Notes and Order Notes. If the reports don't reflect these fields automatically, remove the Invoice Comment and Order Comment objects and replace them with the Invoice Notes and Order Notes objects.
New features and enhancements

New Institution Title Holdings Universe

The Institution Title Holdings Universe contains bibliographic data describing a library's current title holdings as well as Title Holdings Added date objects. The "grain" of the data is one row per Title (OCLC Number) owned. Report Designer customers might use this universe in conjunction with Title Holdings by Material Format to drill down into specific titles owned. It may also be valuable for multi-universe queries.
Additions to Metadata Reports

Metadata Reports now include Canadian Subject Heading authority actions

Reporting of Canadiana authority file activity has been added with respect to Canadian subject headings in English (subjects as well as geographic names). The Daily and Monthly Record Manager Action reports now include Canadian Subject heading actions. For more information regarding the Canadiana authority file and Record Manager functionality, see the Record Manager Release Notes.

[Table and diagram related to report generation and filtering]
Delete WorldCat Record action added to Daily and Monthly Record Manager reports

Record Manager has implemented functionality that allows users to delete their own bibliographic records if no other holdings are attached to it. These statistics are now tracked in the Daily and Monthly Record Manager Action reports. More information regarding this functionality can be found here.

New objects and replaced objects in the Acquisitions Universe

Legal Deposit Receipt objects

The following Legal Deposit Receipt objects have been added to the Copy folder in the Acquisitions universe. More information about legal deposit receipts can be found here.

- **Legal Deposit Receipted Flag** - A flag ("Y" or "N") indicating whether or not a Legal Deposit Receipt has been sent for a specific copy of an item.
- **Legal Deposit Receipt Number** - The unique number assigned to each Legal Deposit Receipt. This number is based on configuration by the institution on the Legal Deposit Receipts administration screen.
- **Legal Deposit Receipt Sent Date** - The date the Legal Deposit Receipt was last sent to the vendor.
Renamed Invoice Comment and Order Comment fields to Invoice Notes and Order Notes

- **Invoice Notes** - Text entered by the user commenting on an invoice. This replaces the Invoice Comment object.
• **Order Notes** - Note for an order that describes the purpose or status of the order, changes to an order over time, etc. This replaces the Order Comment object.
New and renamed objects in the Circulation Item Status Universe

New Item Last Seen objects

- **Item Last Seen Branch Name** - The library branch where the item was last checked in or checked out.
- **Item Last Seen Institution Name** - The institution where the item was last checked in or checked out.
- **Item Last Seen Institution Symbol** - The three or five-character code assigned by OCLC to identify the institution where the item was last checked in or checked out. This is often referred to as the OCLC symbol.
Renamed Source Transaction date objects to Item Last Seen

- **Item Last Seen Date** - The date the item was last checked in or checked out. This replaces the Source Transaction Date object.

- **Item Last Seen Day** - The enumerated day (1-31) of the month the item was last checked in or checked out. This replaces the Source Transaction Day object.

- **Item Last Seen Day Name** - The day of the week (e.g., Wednesday) the item was last checked in or checked out. This replaces the Source Transaction Day Name object.

- **Item Last Seen Month** - The enumerated month of the year (e.g., 11) the item was last checked in or checked out. This replaces the Source Transaction Month object.

- **Item Last Seen Month Name** - The month name (e.g., November) the item was last checked in or checked out. This replaces the Source Transaction Month Name object.

- **Item Last Seen Year** - The year the item was last checked in or checked out. This replaces the Source Transaction Year object.
### Bug fixes

#### Material Format/Subformat updates

Prior to 21 February 2019, certain Material Formats and Subformats were appearing as N/A in Cataloging/Collection reports. Below is the previous mapping from the X0 and X4 format index values to Material Format and Subformat objects in all Cataloging/Collection reports and universes.

<table>
<thead>
<tr>
<th>X0</th>
<th>X4</th>
<th>Material Format</th>
<th>Material Subformat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web</td>
<td>Digital</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>CompFile</td>
<td>Digital</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>IntMM</td>
<td>Digital</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Image</td>
<td>2D</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Music</td>
<td>Cassette</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Going forward, the mapping will be updated to reduce the number of N/As in the result set when Material Format and Subformat objects are used. This update will not alter historical data.
Five additional formats and two additional subformats will now populate, where previously they read N/A. These updates are outlined below.

<table>
<thead>
<tr>
<th>X0</th>
<th>X4</th>
<th>Material Format</th>
<th>Material Subformat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web</td>
<td>Digital</td>
<td>INTERNETRESOURCES</td>
<td>WEBSITE</td>
</tr>
<tr>
<td>CompFile</td>
<td>Digital</td>
<td>COMPUTERFILES</td>
<td>N/A</td>
</tr>
<tr>
<td>IntMM</td>
<td>Digital</td>
<td>INTERACTIVEMULTIMEDIA</td>
<td>N/A</td>
</tr>
<tr>
<td>Image</td>
<td>2D</td>
<td>IMAGES</td>
<td>N/A</td>
</tr>
<tr>
<td>Music</td>
<td>Cassette</td>
<td>MUSIC</td>
<td>CASSETTE</td>
</tr>
</tbody>
</table>

Please note that the remaining N/A Material Subformats occur because there are no subformats used with those specific material formats.

**Item Call Number updates**

Previously, if the institution cataloged an item with two $i fields in the LHR's 852 field, the LHR Item Call Number field in the LHR Item Detail universe and the FTP Item Inventories file separated these two fields with a comma. Now the values in this field will be separated by a space character in the LHR Item Detail universe and the FTP Item Inventories file.

**Known issues**

Current and fixed known issues can be found here.

**Important links**

**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

https://help.oclc.org/Library_Management/WorldShare_Reports/Release_notes_and_known_issues/2019_Releas...