WorldShare Reports release notes, November 2017

Release Date: November 29, 2017

Introduction

Review these sections to see the new features, enhancements, and bug fixes for this release:

- New features and enhancements
- Reporting updates
- Other new features and enhancements
- Bug fixes

Important links are also available.

New features and enhancements

WMS Group Reporting

OCLC Analytics is releasing new functionality for WMS Groups to assist these groups in reporting activity and statistics about their group as a whole.

Some prerequisites to utilize this functionality:

- Your group must be set up as a WMS Group.
- All of your group member institutions must be Report Designer customers.
- Your group must designate administrators. Group report administrators will see all data for the group (e.g., Circulation Administrators will see all patron and circulation data across the group). Please confirm your WMS Group leadership is aware and accepting of this functionality.

If the above prerequisites are met and your group wishes to pursue WMS Group reporting, please contact analyticsfeedback@oclc.org. The OCLC Analytics team will be responsible for applying the necessary roles in order to allow the admin user to perform the group-level reporting required. OCLC Analytics will provide additional information about running these reports and understanding the output.

WMS Group Report Administrators — Roles

New WMS Group roles include:


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• **WMS_GROUP_ACQUISITIONS_ADMIN** - Allows users with this role to see all Circulation and Patron data for all members of your WMS Group. This includes group visibility into the following data universes:
  - Acquisitions
  - Serials Received

• **WMS_GROUP_CIRCULATION_ADMIN** - Allows users with this role to see all Cataloging data for all members of your WMS Group. This includes group visibility into the following data universes:
  - Circulation Events
  - Circulation Fiscal Transactions
  - Circulation Hold Request
  - Circulation Item Status
  - Circulation Patron Information
  - Circulation Scheduled Items

  Additionally, the user will be able to run three new Group Circulation reports:
  - **Group Circulation Events Detail Report**: List of circulation events for a WMS Group where the patron’s institution is different than the item’s owning institution.
  - **Group Open Hold Requests Report**: List of open hold requests for a WMS Group.
  - **Group Overdue Items Report**: List of overdue items for a WMS Group where the patron’s institution is different than the item’s owning institution.

• **WMS_GROUP_ERESOURCES_ADMIN** - Allows users with this role to see all E-Resources data for all members of your WMS Group. This includes group visibility into the following data universes:
  - E-Resources
  - Overlap

• **WMS_GROUP_CATALOGING_ADMIN** - Not yet available.

**WMS Group Report Administrators - Report Scope**

WMS Group Administrator users will see an additional option for selecting their report scope before running a report or initiating the Report Launch Pad. Their selected scope, for their individual institution or their group, will set the context for the report or report designer activities.
Acquisitions Subscription Data (Report Designer only)

Report Designer customers can now create reports that analyze Acquisitions subscriptions utilizing six new objects in the Acquisitions universe:

- **Original Order Item Number**: System-supplied Order Item Number of the original subscription order item, e.g., PO-2014-1004-1, OIN-2014-1667, etc.
- **Subscription End Date**: The date the order item's subscription ends, e.g., 2017-12-31.
- **Subscription Master ID**: Identifier assigned automatically by the system to all subscription order items that are renewals of the same original subscription item, e.g., 41846.
- **Subscription Renewal Count**: The number of times the subscription has been renewed. At the Order Item level, a numeric value of one (1) indicates a renewed subscription item.
- **Subscription Renewal Status**: The value that indicates if a subscription item has been renewed or not, i.e. Renewed or Not Renewed.
- **Subscription Start Date**: The date the order item's subscription starts, e.g., 2017-01-01.
Reporting updates

FTP Files

FTP - Circulation Patron Full

Starting on 10 December 2017, the FTP Patron Full files created on a weekly basis containing the full list of patrons will be replaced by a new Analytics process that will allow for better support and maintenance of the file generation. The new files will be named `<symbol>`.`Circulation_Patron_Report_Full.YYYYMMDD.txt` and `<symbol>`.`Circulation_Patron_Report_Full.YYYYMMDD.csv`. These files will be placed in the same location, the OCLC FTP (wms/reports directory), as the existing `<symbol>`.`Patron_Report_Full.YYYYMMDD.txt` and `<symbol>`.`Patron_Report_Full.YYYYMMDD.xls` files. These previous versions of `Patron_Report_Full` will be discontinued after 31 January 2018.

Users should migrate any post-processing of the FTP patron files to the new versions (named `Circulation_Patron_Report_Full`) by 31 January 2018.

Users will notice slight differences between the old and new versions of the file, mainly an empty string that was noted as "---" in the previous `Patron_Report_Full` will now be noted as "N/A" in the new `Circulation_Patron_Report_Full`. Additionally, the column names have changed to match Analytics terminology.
FTP - Circulation Patron Week

Starting on 24 December 2017, the FTP Patron Week files created on a weekly basis containing new or modified patrons in the last week, will be replaced by a new Analytics process that will allow for better support and maintenance of the file generation. The new files will be named <symbol>.Circulation_Patron_Report_wk.YYYYYYMMDD.txt and <symbol>.Circulation_Patron_Report_wk.YYYYYYMMDD.csv. These files will be placed in the same location, the OCLC FTP (wms/reports directory), as the existing <symbol>.Patron_Report_wk.YYYYYYMMDD.txt and <symbol>.Patron_Report_wk.YYYYYYMMDD.xls files. These previous versions of Patron_Report_wk will be discontinued after 31 January 2018.

Users should migrate any post-processing of the FTP patron files to the new versions (named Circulation_Patron_Report_wk) by 31 January 2018.

Users will notice slight differences between the old and new versions of the file, mainly an empty string that was notated as "---" in the previous Patron_Report_wk will now be notated as "N/A" in the new Circulation_Patron_Report_wk. Additionally, the column names have changes to match Analytics terminology. These files will now contain the same columns as the Circulation Patron Full files.

<table>
<thead>
<tr>
<th>CURRENT VERSION (DISCONTINUED AFTER 31 JANUARY 2018)</th>
<th>NEW VERSION</th>
</tr>
</thead>
</table>

New Titles/Removed Titles — Publisher Names from 264 $b

Logic has been updated when loading Publisher Name data that appears in the New Titles and Removed Titles reports, as well for Report Designers using the Cataloging and LHR Item Detail universes. If the publisher data for a title from the MARC 260 $b is missing or null, then Analytics will now use the MARC 264 $b to populate Publisher Name. Previously, the MARC 264 $b was not pulled in.
## New Titles List

**OCLC University**

Report Criteria:  
- **Start Year Month (YYYY-MM):** 2017-04  
- **End Year Month (YYYY-MM):** 2017-04  
- **Call Number (Use % wildcard):** All  
- **Material Format:** All  
- **Material Subformat:** All  
- **Shelving Location:** All  
- **Source Application:** COLLECTION MANAGER - CATALOGING PARTNER COLLECTION MANAGER - DATA SYNCHRONIZATION, CONNEXION, CONTRACT SERVICES, DIGITAL COLLECTION GATEWAY, N/A, OCLC PROCESSING, RECORD MANAGER, WORLDSHARE MANAGEMENT SERVICES, METADATA API-CC:Web

<table>
<thead>
<tr>
<th>Call Number</th>
<th>Author</th>
<th>Title</th>
<th>Publisher</th>
<th>Publication Date</th>
<th>Edition</th>
<th>Language</th>
<th>Material</th>
</tr>
</thead>
<tbody>
<tr>
<td>E207 .077 2013</td>
<td>O'Shaughnessy, Andrew Jackson.</td>
<td>The men who lost America: British leadership, the American Revolution, and the fate of the empire</td>
<td>Yale University Press</td>
<td>2013</td>
<td>N/A</td>
<td>English</td>
<td>BOOKS</td>
</tr>
<tr>
<td>F-VIE</td>
<td>Viel, Tanguy,</td>
<td>La disparition de Jim Sullivan</td>
<td>Les Éditions de Minuit</td>
<td>2017</td>
<td>N/A</td>
<td>French</td>
<td>BOOKS</td>
</tr>
</tbody>
</table>
Other new features and enhancements

Report Designer: Circulation — Item Long Overdue dates

Report Designer customers can now employ an additional long overdue date in the Circulation Item Status universe:

- **Item Long Overdue Policy Date**: The date and time that an item will be considered long overdue if it is retained by the patron past its due date. This date and time is set according to library policy when the item is checked out to the patron and is updated whenever the item is renewed or otherwise has its loan period extended.

Related, the following field has had its definition updated:

- **Item Long Overdue Date**: The actual date and time that an item went to a long overdue state, per library policy.


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Report Designer: Circulation — Item Record Type

Report Designer customers can now utilize the Item Record Type in the Circulation Item Status universe:

- **Item Record Type**: The type of item described in the holdings statement, e.g., SINGLE_PART, MULTI_PART, SERIAL, etc. Derived from the coded value in position 6 of the LHR leader.
Report Designer: Cataloging — Dewey Classification fields

To simplify filtering and sorting, the following Dewey classification fields are now offered in the Title Holding Information folder of the Cataloging universe:

- **Dewey Main Class Name**: The name of one of the ten major classes of the DDC, e.g., Science.
- **Dewey Main Class Number**: One of the ten major subdivisions of the DDC, represented by the first digit in the notation, e.g., 3 in 300 Social Sciences.
- **Dewey Division Name**: The name of the second level of subdivision in the DDC. E.g., Biology.
- **Dewey Division Number**: The second level of subdivision in the DDC, represented by the first two digits in the notation, e.g., 62 in 620 Engineering and allied operations.
<table>
<thead>
<tr>
<th>Dewey Main Class Name</th>
<th>Dewey Main Class Number</th>
<th>Dewey Division Name</th>
<th>Dewey Division Number</th>
<th>Title Holdings Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Philosophy &amp; Psychology</td>
<td>100</td>
<td>Philosophy</td>
<td>100</td>
<td>433</td>
</tr>
<tr>
<td>Philosophy &amp; Psychology</td>
<td>100</td>
<td>Metaphysics</td>
<td>110</td>
<td>259</td>
</tr>
<tr>
<td>Philosophy &amp; Psychology</td>
<td>100</td>
<td>Epistemology</td>
<td>120</td>
<td>425</td>
</tr>
<tr>
<td>Philosophy &amp; Psychology</td>
<td>100</td>
<td>Parapsychology &amp; Occultism</td>
<td>130</td>
<td>316</td>
</tr>
<tr>
<td>Philosophy &amp; Psychology</td>
<td>100</td>
<td>Philosophical schools of thought</td>
<td>140</td>
<td>267</td>
</tr>
<tr>
<td>Philosophy &amp; Psychology</td>
<td>100</td>
<td>Psychology</td>
<td>150</td>
<td>3,628</td>
</tr>
<tr>
<td>Philosophy &amp; Psychology</td>
<td>100</td>
<td>Philosophical Logic</td>
<td>160</td>
<td>75</td>
</tr>
</tbody>
</table>
Report Designer: Institution Symbol added to four universes

Report Designer customers can now add OCLC institution symbol to reports. OCLC symbols can be used in place of an institution's full name, allowing you to make better use of space, or for filtering.

Circulation Hold Request:
- Item Owner Institution Symbol
- Item Primary Institution Symbol

Circulation Item Status:
- Item Last Issued Institution Symbol

LHR Item Detail:
- Institution Symbol

Overlap:
- Collection Owning Institution Symbol
- Collection Source Institution Symbol

Bug fixes

Title ISBN field fully populated

The Title ISBN value was incorrectly set to N/A or was incomplete for some WorldCat titles. This issue impacted Report Designer customers who have created reports with the Title ISBN object in the following universes: Cataloging (Volatility Information folder), LHR Item Detail, Overlap. After this release, the Title ISBN value will be populated with the correct value(s).

LHR Index Enumeration and Chronology is no longer blank

The LHR Index Enumeration and Chronology field was blank/empty in the LHR Item Detail universe in the U.S. Data Center. After this release, LHR Index Enumeration and Chronology field will be populated with the correct value, or “N/A” if there is no value present.

Circulation Dashboard - full results

The Circulation Dashboard report was returning partial results (indicated by a small yellow triangle in the bottom right of the window) for some institutions with large collections, resulting in a report that contained inaccurate data. After this release, the Circulation Dashboard should no longer return partial results.
Patron Last Activity Date - population

In some scenarios, the Patron Last Activity Date was displaying the null equivalent (01-01-0001) in the Circulation universes for some patron records that actually had circulation activity. After this release, the Patron Last Activity Date should contain the correct last activity date for the patron.

High Use Circulation Titles Summary Report - performance

In some cases, the High Use Circulation Titles Summary Report was not returning results after many minutes of processing. After this release, the High Use Circulation Titles Summary Report should return results in a timely fashion. (Note: if long time frames are used for the start and end date prompts, partial results may still be encountered. Shorter time frames should be used in this case.)

Item Issued Count and Item Issued Count YTD - updated definitions

The Item Issued Count and Item Issued Count YTD field definitions in the Circulation Item Status universe were updated. After this release, the definitions will be:

**Item Issued Count**: The number of times an item has been checked out or renewed. May also include statistics from a previous ILS.

**Item Issued Count YTD**: The number of times an item has been checked out or renewed since 1 January of the current calendar year.

Important links

Post release Product Insights session

- 13 December 2017 at 11:00 am, US Eastern (Standard) Time (GMT -05:00)
- Note that this month's release overview will be combined with the Product Insights session.

Support website(s)

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

- OCLC Community Center
- Browser compatibility chart

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