

WorldShare Admin release notes

The next release for the WorldShare Admin interface is scheduled for 17 July 2020. This release contains new features including:

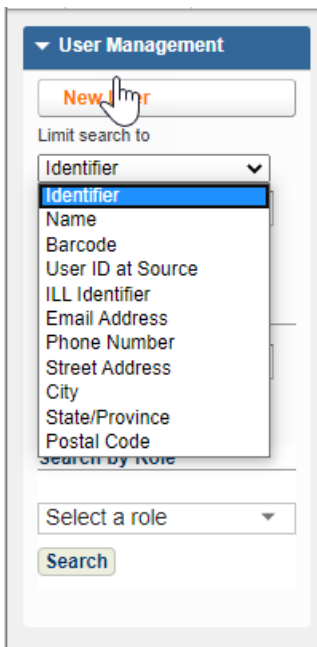
- New options in the search panel
- Revised grouping of role names in the read-only and edit views
- Help text Icons added to each role, providing a brief summary of role definitions

The Administration Panel Search Functionality has been improved, providing additional options to further narrow your search results.

New options have been added to the Search panel:

- Identifier
- Email Address
- Phone Number
- User ID at Source

We appreciate the feedback received regarding the upcoming changes and will continue working on improvements for the search function. The following are the first phase of improvements; additional modifications will be completed for release later this year.



A noticeable change is the elimination of the Everything search parameter. Although this option was removed, terms you may have previously included within an Everything search are now available as additional parameters - User ID at Source, Email Address and Phone Number have been included as options and overall indexing has been improved. A new index, 'Identifier' has been added for selection - this option allows searching via the use of one index which includes all of the identifier options - Barcode, User ID at Source, ILL Identifier and PPID.

Wildcard operator searches (ex. "**") are no longer available in the new search engine. Again, indexing has been improved, therefore search results will include all matching responses based upon the term entered in the search field.

These changes collectively provide multiple methods to refine search results.

When initiating a search for user records you will find:

- Data is sorted and search results presented in the order of last(family)name, first(given)name, middle name, preferred name. Prefix and suffix search is not included.
- Improvement of generated results when searching terms that include diacritics
- The Search by Role and Search by PPID options remain available, no change has been made at this time. In an upcoming release, you will notice that formatting of role names presented in the Search by Role selection box will be improved, similar to the update completed in the Roles display

Tips:

- With any search entries, enter specific terms to generate relevant responses; this is especially useful when entering Correlation Data (Barcode, User ID at Source and ILL Identifier)
- Want to generate a count of user records available for an institution? Consider using the Search by Role function to complete a search for records assigned the Everyone role, which is a core authority assigned to all user records.

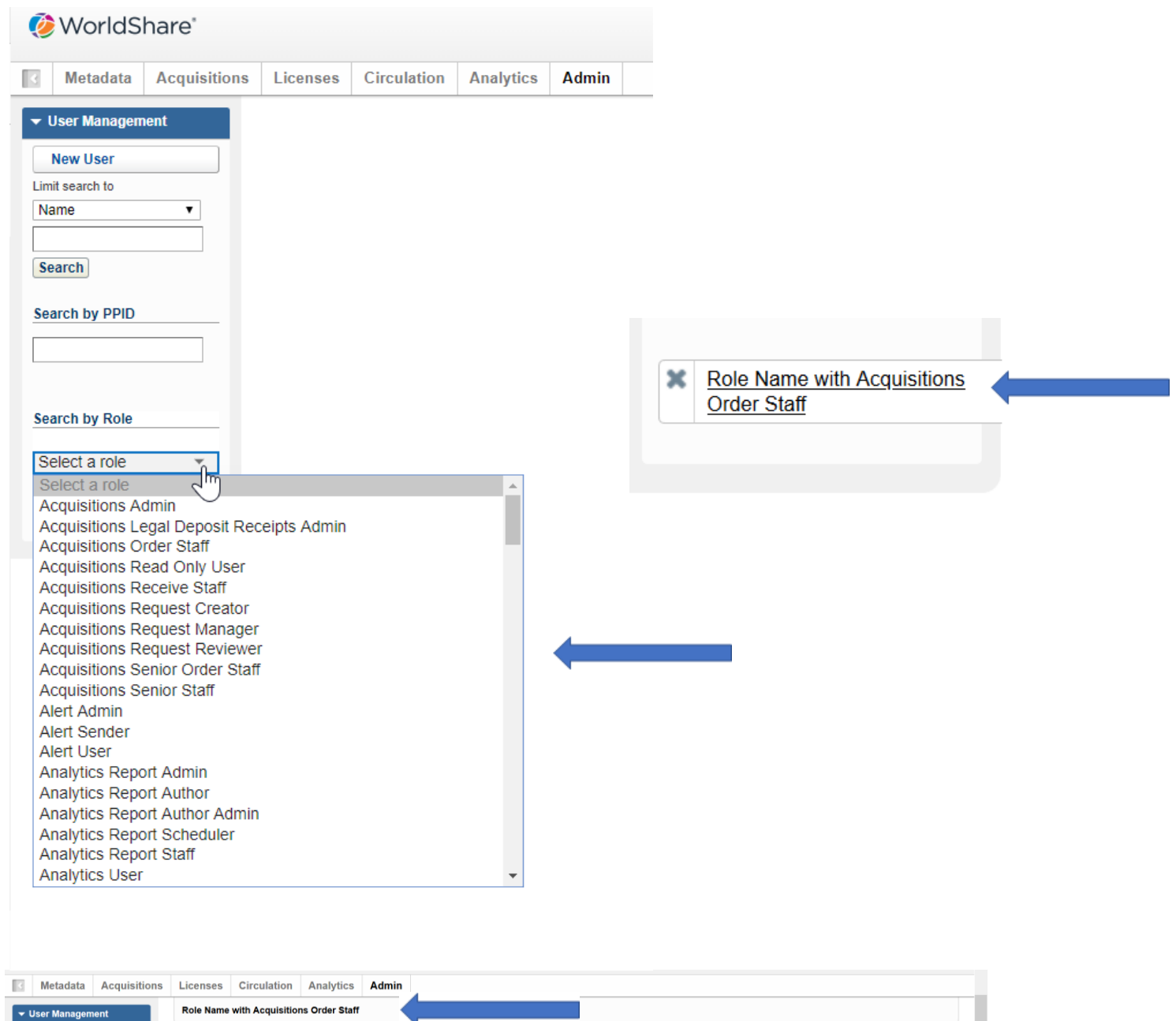
Roles Panel and Search by Role Improvements

Identity Management will release additional improvements for the Roles panel, as well as a revision of formatting for role names presented in the Search by Role option.

Changes include the following:

- Revised grouping of role names in the read-only and edit views
- Help text icons added to each role, providing brief summary of role definitions
- Formatting of role names presented in the Search by Role option has been improved

Example of Format Changes for Search by Role



The screenshot displays the WorldShare Admin interface. At the top, there is a navigation bar with tabs for Metadata, Acquisitions, Licenses, Circulation, Analytics, and Admin. Below this, the 'User Management' section is expanded, showing options for 'New User', 'Limit search to' (set to Name), and 'Search by PPID'. The 'Search by Role' section is active, displaying a dropdown menu with a list of roles. A blue arrow points to the dropdown menu, and another blue arrow points to a specific role name, 'Role Name with Acquisitions Order Staff', which is highlighted in a callout box. At the bottom of the interface, the 'Admin' tab is selected, and the role name 'Role Name with Acquisitions Order Staff' is displayed in the search results area, with a blue arrow pointing to it.

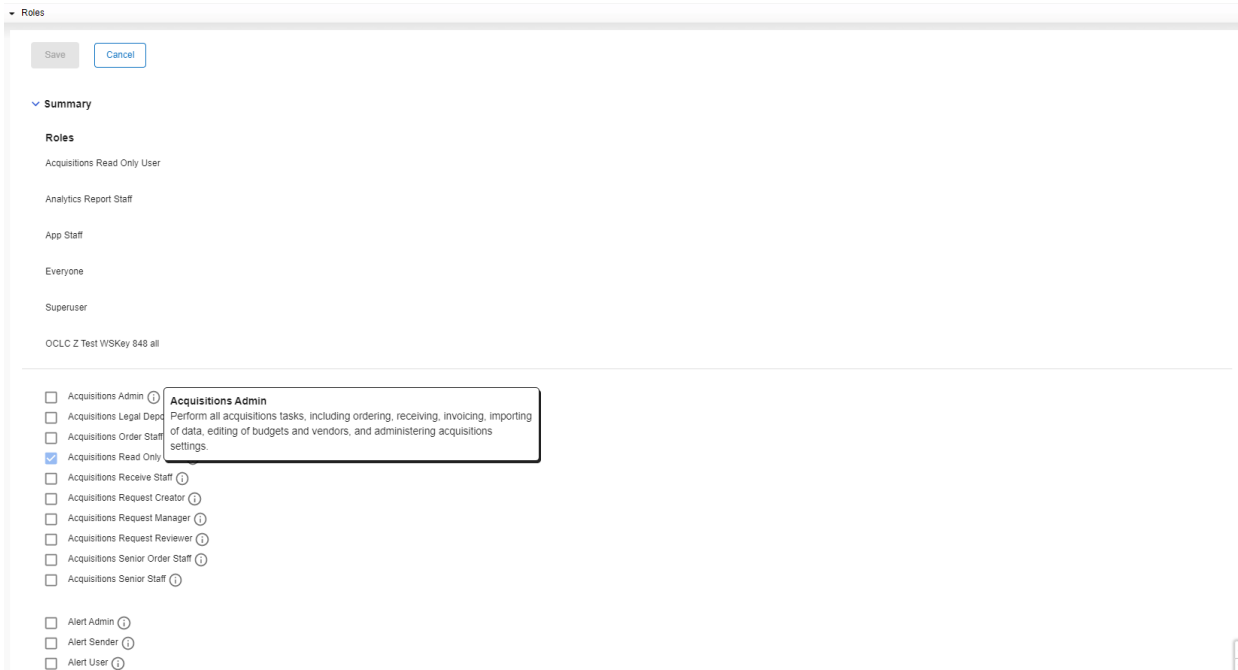
Format Changes for Roles Panel

Roles available for assignment are now formatted with similar product offerings displayed together.

- Cataloging Admin ⓘ
- Cataloging Agent ⓘ
- Cataloging Bulk Edit ⓘ
- Cataloging CONSER ⓘ
- Cataloging Evaluation ⓘ
- Cataloging Export ⓘ
- Cataloging Full ⓘ
- Cataloging Limited ⓘ
- Cataloging National ⓘ

- Circulation Admin ⓘ
- Circulation Desk ⓘ
- Circulation Desk Privacy ⓘ
- Student Worker ⓘ
- Student Worker Circulation ⓘ
- Student Worker Restricted ⓘ

Icons have been added next to each role providing "help text" summary data for users to reference.



▼ Roles

Save Cancel

▼ Summary

Roles

Acquisitions Read Only User

Analytics Report Staff

App Staff

Everyone

Superuser

OCLC Z Test WSKey 848 all

Acquisitions Admin ⓘ **Acquisitions Admin**
Perform all acquisitions tasks, including ordering, receiving, invoicing, importing of data, editing of budgets and vendors, and administering acquisitions settings.

Acquisitions Legal Dept ⓘ

Acquisitions Order Staff ⓘ

Acquisitions Read Only ⓘ

Acquisitions Receive Staff ⓘ

Acquisitions Request Creator ⓘ

Acquisitions Request Manager ⓘ

Acquisitions Request Reviewer ⓘ

Acquisitions Senior Order Staff ⓘ

Acquisitions Senior Staff ⓘ

Alert Admin ⓘ

Alert Sender ⓘ

Alert User ⓘ