WorldShare License Manager Release Notes

Release Date: February 12, 2017

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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.

<table>
<thead>
<tr>
<th>Action</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>❏ None</td>
<td></td>
</tr>
</tbody>
</table>

Follow-up Actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

<table>
<thead>
<tr>
<th>Action</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>❏ A new “Vendor” accordion is available for assigning individual or multiple vendors to each license.</td>
<td>4</td>
</tr>
</tbody>
</table>
Browser Support

This release was tested with the following browsers:

- Chrome Version 56.0.2924.76
- Firefox 51.0.1
- Internet Explorer 11.0.9600.18537

Currently supported browsers can be found at:
http://www.oclc.org/support/documentation/browser.en.html
New Features

See Vendor Details within a License

By popular request, License Manager now allows vendor files from “My Library Partner” to be directly associated with relevant licenses of your choosing. The benefits of this new feature include:

- Ability to link directly to the vendor file within “Manage Vendors” for simpler management of relationships
- Inclusion of contact information and vendor links within a new “Vendor” accordion for enhanced decision support
- Linkage between vendor files, license terms, licensing periods, and WorldCat knowledge base collections within a single “License” context
- Future opportunities in this space include derived metrics, support tracking, and enhanced workflows

Example: Single-vendor License Association
Benefits for each vendor configuration style:

<table>
<thead>
<tr>
<th>Single Vendor</th>
<th>Multiple Vendor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Each license represents a contract</td>
<td>Each license represents the value of a single term of use (i.e. “All collections with Interlibrary Loan = Yes”) spread across as many vendors and collections as you like</td>
</tr>
<tr>
<td>May include many terms of use, depending on the complexity of the agreement with your vendor</td>
<td>Simple and quick setup</td>
</tr>
<tr>
<td>Setup time matches the level of detail desired</td>
<td></td>
</tr>
</tbody>
</table>
Search License Comments

By popular demand, you can now search for comments that have been added to any license. This new search displays a result page with text found within the license “comments” accordion, the license description field, and any license term-of-use comment field. The “Location” column links take you directly to the comment found.

![Search License Comments](image)

Improvements

License Results Updated with New Filters and Result Columns

License search results will now display the “Vendor” associations when they are made newly explicit for each license within the Vendors accordion. New filters have been added for “Collection” and “Contract Type” (i.e., single vs. multiple vendor licenses).
Improved Feedback for Manually Uploaded COUNTER Reports

License Manager is currently able to accept XML that conforms to COUNTER 3 and 4 standards. These standards require values in both the “Name” and “Title” sections of the “Report” XML element. For example, the below error is caused by this line in the XML with a missing “Name” value:

```
<Report Created="2016-06-21T05:29:39" ID="1533443" Version="4" Title="Book Report 2">
```

To fix this, either request an edit to the XML from the publishing vendor or manually edit the file using the values found on the COUNTER 4 standards page here: http://www.niso.org/workrooms/sushi/registry/#reports

An acceptable value would like this:

```
<Report Created="2016-06-21T05:29:39" ID="1533443" Version="4" Name="BR2" Title="Book Report 2">
```

License Data Entry Fields Now Accept Larger Entries

To assist in those licenses where the recording of an entire paragraph of information from a license is required, data entry field limits have been expanded to 5,000 characters.
New “Close All Tabs” Navigation Aid

By popular request, an improvement to the left-side navigation for Licenses and Templates will now allow all open tabs to be closed simultaneously.

Bug fixes

- Harvest history page will no longer freeze when certain third-party vendor responses are encountered.
- To ensure usage data integrity, manually uploaded COUNTER reports which cover both long periods of time (greater than one month) and which also do not include monthly sub-totals are no longer accepted. A workaround for these reports is to request one-month-long reports from any publishing vendor which does not subtotal by month.
- A bug was corrected that prevented certain COUNTER reports from being uploaded due to a syntax error in the report.
- The “Terminate Early” functionality associated with active licenses will now save even if a new value is not entered.
- A bug was corrected for the “Follow Template” functionality which was preventing notification of edits on the first template edit.
- A correction was made to the “License Expired” alert which was being sent for those licenses that had automatically renewed.
Known Issues

Please use the discussion forum for License Manager to discuss any issues you encounter, or contact support at support@oclc.org.

The License Manager discussion forum on the OCLC Community Center:
https://www.oclc.org/community/discussions/license_manager.en.html

There are currently no known issues

Looking Ahead

Future Releases

- New functionality to enable visual monitoring of automatic SUSHI harvesting
- New ability to add a collection to a license from within the Collection Manager user interface
- New ability to associate licenses with Acquisitions workflows
- New ability to edit license start dates
- Additional tuning of the Usage Harvester

Feature Roadmap

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

https://www.oclc.org/content/dam/community/LicenseManager/Roadmap/Roadmap_LMAN_12-21a.pdf

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