WorldShare License Manager

Get started

- See an overview of the License Manager interface, get account information, and browse training options.
  - About License Manager
  - License Manager account roles
  - Add a privacy notice
  - Search in License Manager
  - Set or reset your password
  - Sign in to License Manager

Represent your e-resources

- Once you have represented e-resource collections and databases as knowledge base collections in Collection Manager, create licenses and assign the collections to licenses.
  - Add e-resource collections in Collection Manager
  - Automatically select and deselect collections
  - Display public notes in WorldCat Discovery about a resource's terms of use
  - Transition to License Manager (with previously configured knowledge base collections)
  - Trial license survey with response goal tracking

Create a license or template

- Create a new license in License Manager, clone a license, or use a license template contributed by other libraries.
  - Clone a license
  - Create a license from a template
  - Create a new license
  - Create a new license template
  - Terms of use (list)
• **Deflect lending requests**

  See how to configure terms of use in License Manager and create a deflection policy to deflect lending requests from knowledge base collections in Collection Manager. Instructions are included for both WorldShare Interlibrary Loan and Tipasa libraries.

  ◦ Deflection scenarios
  ◦ How to deflect lending requests (License Manager)

• **Configure SUSHI harvesting of COUNTER usage reports**

  Configure SUSHI harvesting of COUNTER usage reports. Use WorldShare License Manager with or without WorldShare Analytics.

  ◦ Configure COUNTER 4 vendors for reporting
  ◦ Configure COUNTER 5 vendors for reporting
  ◦ Setup one-time and recurring harvests

• **Maintain licenses and templates**

  Once you have established your licenses and templates, you can edit, clone, renew, share (for institutions with Group aware), or configure alerts to continue to maintain and alter your information as needed.

  ◦ Calculate a license’s usage cost
  ◦ Configure alerts in the Admin tab
  ◦ Edit, follow, or clone a license template
  ◦ Edit, renew, or terminate a license
  ◦ Share licenses (group aware for consortia)

• **Vendors**

  Search for your vendor. If the vendor isn’t available, create a new vendor and publish the vendor’s information so other libraries can use it. Use vendor information with your Acquisitions workflows.

  ◦ Create a new vendor for use with Acquisitions
  ◦ Edit a vendor
  ◦ Publish a vendor

• **WorldShare License Manager release notes and known issues**

  Find WorldShare License Manager release notes and known issues. Release notes are documents that contain
information about new product features and enhancements as installed in scheduled releases.

- 2020 WorldShare License Manager release notes
- 2019 WorldShare License Manager release notes
- 2018 WorldShare License Manager release notes

**Known issues**

- **WorldShare License Manager training**

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  Find training on WorldShare License Manager.

- **Troubleshooting**

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  Find frequently asked questions (FAQ) and troubleshooting steps (Troubleshooting).

  - How can I get to my SUSHI harvest results in License Manager?
  - How do I publish license terms and retain collection-level notes?
  - How long can COUNTER data be kept in the WMS License Manager module?
  - Is it possible to add additional users for notifications from WorldShare License Manager?
  - Is there a report I can run for license data in License Manager?
  - Is there a way to generate reports for the usage costs per individual journal?
  - Where do I find the Requestor ID and CustomerID for SUSHI Harvesting?
  - I am trying to set up a manual one-time harvest in License Manager but my vendor isn't appearing in the list.
  - I see a globe icon next to a field I want to edit. Will my edits affect other institutions?
  - Where can I keep usage statistics if they aren't counter compliant, can I put them in documents under license?
  - Why am I getting an 'Invalid date format' error when manually uploading COUNTER reports?
  - What is the difference between the vendors found in Usage Data and those found in Vendors?
  - When creating a new license, should the vendor be the publisher or the subscription agent?
  - Where is the option to Renew Licenses in License Manager
  - Why am I receiving a "Vendor Authentication Took Longer than Expected" when testing our credentials?
  - Why am I seeing the error "Error encountered while harvesting" in License Manager?
  - Why am I seeing the error message "The server response could not be understood" in WorldShare License Manager?