Search in License Manager

Learn how to search for licenses, templates, collections, and vendors in WorldShare License Manager.

**Search for a license (in Licenses)**

Note: If no search criteria are entered, all results will be listed. To browse licenses, leave the search box empty and click **Search**.

To search for a license:
1. On the left side of the screen, expand **Licenses**.

2. Perform a **Terms of Use Search**, or select a search Scope from the drop-down list:
   - **License Name**: The name you entered when creating the license in License Manager
   - **Comment Fields**: Text you entered into comments and descriptions when creating the license
   - **Documents**: The documents (file or URL) you added to the license
   - **Vendor**: The vendor from whom you are licensing the collection

3. Type your search term into the search box.

4. Click **Search** or press <Enter>.
   - If the search results extend to two or more screens, use the navigation links (top and bottom of list) to move between screens. Screen headers and footers show your position within the list. For example: Results 11-20 of 56
   - Previous searches appear below the **Search** button. Click a search to return to it

5. On the search results screen, click the license name to open it.

6. **(Optional)**. After you perform a Terms of Use search, a download button ( ) will appear on the screen over your search results. Click the **download button** ( ) to download a .csv file of your search results.

**Filter results**

1. Choose a filter and use the drop-down list to select the filter. Search results can be filtered by:
   - Collection
   - Contract Type
   - License Status
   - License Type
   - Shared (Only available to WorldShare Management Services Libraries with group aware)
   - Signed/ Unsigned

2. Click **Apply**.

To clear an applied filter, click **Reset**.

**Columns in search results**

Search results are sorted alphabetically by template name. To change the sort order, click any column heading.

- **License Name**: The name you typed when creating the license in License Manager. Click the license name to access the license.
- **Paper clip icon**: The paper clip icon indicates attachments.
- **Vendor**: Sort alphabetically by Vendor Name
- **License Type**: The type of license. You can filter by:
  - Free Temporarily: licenses that are not associated with a cost in any way
  - Standard: Renewable licenses intended to cover multiple contract periods
  - Trial Period: Licenses that are not associated with a cost and are intended for evaluation purposes
  - Perpetual: Licenses which include a Start Date but no End Date
• **Shared:** This column appears to WorldShare Management Services Libraries with group aware to indicate whether the license has been shared with another institution. For more information about Sharing licenses, see [Share Licenses (Group aware for consortia)].

• **License Status:** The status of the license. You can filter by:
  ◦ Current: License is in effect
  ◦ Expired: License is no longer in effect
  ◦ Pending: License has been created, but is not in effect

• **Start Date:** The date the license begins (on this date the license becomes valid).

• **End Date:** The date the license ends (on this date the license is no longer valid).

• **Renew-by Date:** The renew-by date is the deadline for renewal or cancelation.
  ◦ You can filter by licenses that have renew-by dates within the next time period you specify. To see only licenses that have renew-by dates within the next year (from today's date one year forward):
    1. Type 1 in the box under Renew.
    2. In the Choose Period list, click Year(s).
    3. Click Filter.

• **Signed:** Indicates whether the license has been signed. You can filter by:
  ◦ All
  ◦ Signed
  ◦ Unsigned

### Terms of Use Search

**Terms of Use Search**

1. Under the search box, click the Terms of Use Search link.
2. In the window that opens, use the drop-down list to Select a Term.
3. Leave the default selection or select one of the following radio buttons. "Encoded" means that it occurs in the license document and has been added to License Manager:
   ◦ Encoded
   ◦ Not Encoded (default)
4. Add term values to the search to further restrict the search. For example, to search for licenses where the values are enabled:
   a. Select Yes for Copy Supplied to Library.
   b. Add Portico (for perpetual access) in the Methods box.

See the [Terms of Use (list)]

### Search for a template (in Templates)

To search for a template:

1. On the left side of the screen, expand Templates.
2. From the list, select the index to search:
   - **Template Name**: The name you entered when creating the template in License Manager
   - **Licensor**: The vendor from whom you are licensing the collection
   - **Collection**: The collection associated with the template you want to find
   - **Documents**: The documents (files or URLs) you added to the template you want to find

3. Type the search term in the search box.
4. Click **Search** or press <Enter>.
   - If the search results extend to two or more screens, use the navigation links (top and bottom of list) to move between screens. Screen headers and footers show your position within the list. For example: Results 11-20 of 56
   - Previous searches appear below the **Search** button. Click a search to return to it
5. On the Search results screen, click the **Name** of the template to access it.

Note: If no search criteria is entered, all results will be listed. To browse templates, leave the search box empty and click **Search**.

**Filter results**

Template results can be filtered by Licensor or by Type. Expand **Filter by Licensor** or **Filter by Type** and begin typing.

**Columns in search results**

Search results are sorted alphabetically by template name. To change the sort order, click any column heading.

- **Name**: The name you typed when creating the template in License Manager. Click the template **Name** to access the template
- **Paper clip icon**: The paper clip icon indicates attachments
- **Licensor**: The vendor from whom you are licensing the collection. Licensor is the only filter available for templates
- **Type**: Public or private
- **Action**: Create License. Click **Create License** to create a license from the template

**Search for collections (in Collection Manager)**

See [Search for collections in Collection Manager](https://help.oclc.org/Library_Management/WorldShare_License_Manager/Get_started/Search_in_License_Manager). When you search in Collection Manager, knowledge base collections will show if there are licenses available or will let you add a license.

For information on managing your electronic resource titles as knowledge base collections in Collection Manager, see documentation about [Knowledge base collections](https://help.oclc.org/Library_Management/WorldShare_License_Manager/Get_started/Search_in_License_Manager).

**Search for a vendor (in Usage Data)**

To search for a vendor to configure the vendor for harvesting usage data for your e-resources:
1. On the left side of the screen, expand **Usage Data**.
2. Enter your search terms in the **Available SUSHI Vendors** box.
3. Click **Search**.
4. The search results will appear with three tabs at the top:
   - **Available SUSHI Vendors**: Displays all vendors currently available in License Manager.
   - **My Request Vendors**: Displays vendors previously requested by your library for addition to License Manager.
   - **My Aggregators**: Displays available aggregator platforms that can be used with WorldShare License Manager to enable SUSHI harvesting.
5. Find your desired vendor in the search results.
   - Select **Configure Vendor** to configure a vendor for harvesting usage data.
   - If you have previously configured a vendor, select the **Actions** tab to **Edit** or **Delete** the configuration.

**Search for a vendor (in Vendors)**

1. On the left navigation, click **Vendors**.
2. From the list, select the index to search. You can search by:
   - **Keyword**: Words in any of the indexes
   - **Vendor Name**: Words in the vendor name
   - **Location**: Words in the vendor's address
   - **Contact Name**: Words in the contact name
3. Type the search term in the text box. Tips:
   - Start or end searches with an asterisk (*) to increase your results. For example:
     - *rown* retrieves both *brown* and *crown*
     - *cop* retrieves both *copy* and *copies*
     - (*) Searching with only an asterisk (*) retrieves all possible results
4. Click **Search** or press <Enter>.
   - Previous searches appear below the **Search** button. Click a search to return to it
   - If the search results extend to two or more screens, use the navigation links (top and bottom of list) to move between screens. Screen headers and footers show your position within the list. For example: Results 11-20 of 56
5. On the Search results screen, click the name of the vendor to open the vendor record.

**Filter results by In Use or Not in Use**

Use the drop-down list in the upper right corner of the screen to filter results by In Use or Not in Use. These statuses have the following meanings:

- **In Use** (✔): You can initiate transactions with vendor
- **Not in Use** (🚫): You cannot initiate transactions with vendor. The vendor will not appear as an option anywhere in the system

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https://help.oclc.org/Library_Management/WorldShare_License_Manager/Get_started/Search_in_License_Manager
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Columns in search results

Search results are sorted alphabetically by vendor name. To change the sort order, click on **Vendor Name**.

Some columns need explanation:

- **My Library Partner**:
  - Checked box: the vendor is in use
  - Unchecked box: the vendor is not in use
- **Private/Public**: Icons indicate whether vendor information is shared or not
  - Public/Published (🌐): A globe indicates that vendor information that is available to any library (as a result of it being published by a library). Note: In the General and Identifiers categories, if a library overwrites a field, the field is no longer shared, but the Globe icon remains unchanged
  - Private/Not published (🏠): A house indicates that vendor information that is private and available only to your library (not published)
  - Some public and private (🌐🏠): Both a globe and a house indicate that within Addresses and Contacts, some information is public and some is private