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# **ISWC Agency Portal User Guide**

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# 1 Introduction

The International Standard Musical Work Code (ISWC) is an ISO standard (ISO 157071<sup>1</sup>), which defines unique identifiers for musical works on an international level, which eases the unambiguous identification of a work. For further information refer to the website <a href="https://www.iswc.org">www.iswc.org</a>.

A musical work is characterized by its metadata, which contains essentially the title, the Creators and some other attributes, e.g. the roles of the Creators in the work.

# 2 Accessing the ISWC Portal

The ISWC Agency portal is accessed via CIS-Net or directly at: <a href="https://iswcAgency.cisac.org/">https://iswcAgency.cisac.org/</a>. Access to the portal is granted to Society users by their CIS-Net Administrator. You will need to enter your CIS-Net login details to access the portal.

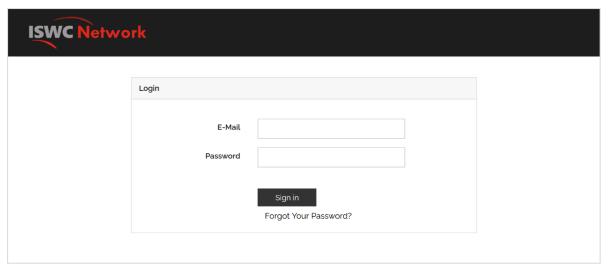


Figure 1 - Log In page

# 3 Global Navigation

Once you are inside the portal it will display the Global Navigation; the top menu bar present within all the pages on the site. It contains the following set of links:

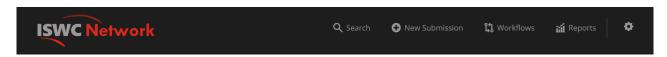


Figure 2 – Global Navigation

<sup>&</sup>lt;sup>1</sup> The standard may be obtained from ISO at <a href="http://www.iso.org/iso/catalogue\_detail?csnumber=28780">http://www.iso.org/iso/catalogue\_detail?csnumber=28780</a>

- **ISWC Network logo** Takes you to the landing page of the site, the "Search" page.
- **Search** Search for an existing ISWC or metadata.
- New Submission Create a new ISWC Submission.
- Workflows View and process the workflows generated by ISWC actions.
- **Reports** Review and extract reports relating to ISWC submissions. (Reports will be deployed at a future date)
- **Settings** Displays the "Log Out" button to abandon your session on the portal and "My Profile" button that displays users current and available permissions.

# 4 Search Page

This page will provide you with a set of search tools and options to initiate searches against the ISWC database. The "Search" page is divided into different sections, each of which is described below.

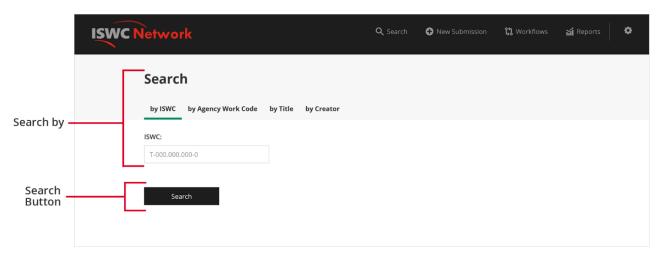


Figure 3 – Search page

# 4.1 "Search by" section

This section provides a set of tabs with 4 different options available to search and retrieve information from the ISWC database.

Each "Search by" option displays specific types of fields (search arguments) that can be used to initiate a search.

The options available in the "Search by" section are as follows:

#### 4.1.1 Search By ISWC

Searches for ISWC metadata using the ISWC assigned to the work. The ISWC field allows the letter "T", period, dash and numbers. The search engine will automatically add the formatting characters (periods and dashes) after you have input the full ISWC number into the field (if excluded).

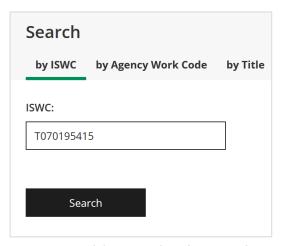


Figure 4 - Search by ISWC, where formatting has been excluded.

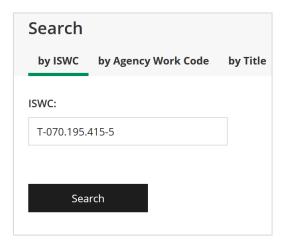


Figure 5 - Search by ISWC, after the engine formats the ISWC.

# 4.1.2 Search by Agency Work Code

Searches for ISWC metadata using the Agency Work Code<sup>2</sup>, the Agency name and Database (which can be the Agency itself or a hub such as WID).

# 4.1.3 Search by Title

Searches for ISWC metadata using the title of the work. In the Title field, the partial title of the work or words used within the title of the work can be entered.

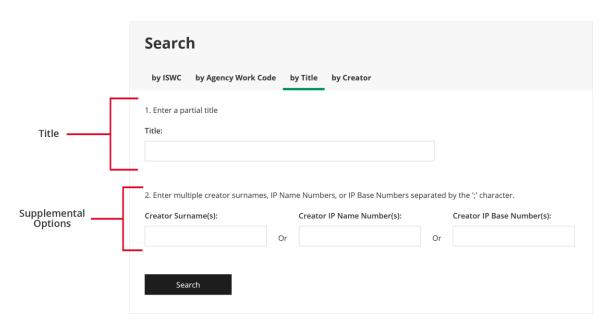


Figure 6 - Search by Title

<sup>&</sup>lt;sup>2</sup> Agency Work Code is an Agency's internal identifier for the work when it was submitted to the ISWC database.

### Example:

**Partial title.** If you don't know the complete title of the song, you can search for partial titles and you will be returned all titles that contain some or all of those words. For a faster search, or if the desired result is not returned, use as complete a title as possible. E.G. search for THE WATCHTOWER will also retrieve the title ALL ALONG THE WATCHTOWER

Supplementing with optional search criteria yields more specific results. These fields include:

- a) A list of Creators Surname(s) (each of them separated by the character ";")
- b) Or a list of Creator IP Name Number(s) (each of them separated by the character ";")
- c) Or a list of Creator IP Base Number(s) (each of them separated by the character ";")

#### 4.1.4 Search by Creator

Searches for ISWC metadata using the Creator IP Name Number<sup>3</sup> assigned to the Creators of the work or the Creator IP Base Number.

The fields and search criteria are as follows:

- a) A list of Creator IP Name Number(s) (each of them separated by the character ";"). The search criterion allows only numbers.
- b) Or a list of Creator IP Base Number(s) (each of them separated by the character ";")

# 4.2 Search Button

The "Search" button initiates the search.

Alternatively, the ENTER key of the keyboard can be used.

#### 4.3 Search Results

The "Search Results" section will be displayed below the "Search" button after this has been clicked and the search is initiated. It will show a list of all entries that matched the search criteria. A more detailed view for each work returned in the search results can be accessed by clicking the "View More" button.

The following information will be displayed in the Search Results section:

<sup>&</sup>lt;sup>3</sup> IP Name Number is the internationally standardized number which unambiguously identifies the name of the Interested party

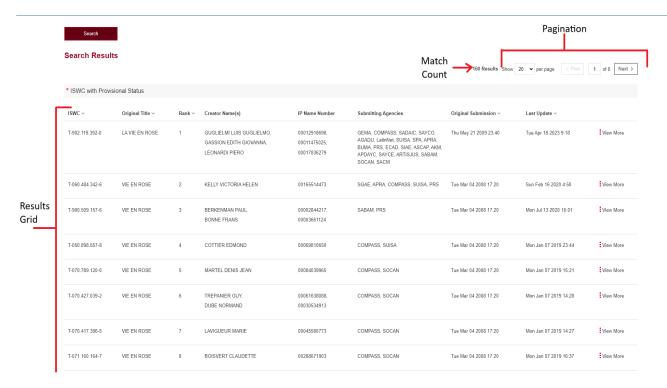


Figure 7 - Search Results

#### 4.3.1 Match Count

When the requested search results are returned, this field indicates the total number of entries that matched for the search criteria entered by you.

#### 4.3.2 Pagination

The Pagination section provides you with a set of options for the display of works and navigation between the pages available in the Search Results. The Pagination options available in the Search Results are as follows:

- **Works per page.** Select the number of works that should be displayed per page in the Search Results. The works per page options are available in increments of 10 works per page, from 20 to 100, with a default value of 20 works per page.
- Navigation. Navigate the pages available in the search results by using the following options:
  - Next. Clicking the "Next" button with the right-directional arrow symbol will take you to the next available page in the Search Results.
  - Previous. Clicking the "Prev" button with the left-directional arrow symbol will take you to the previous page in the Search Results.
  - Current Page. Entering the desired page number into this field will automatically load and display the Search Results from that page.

The Match Count and Pagination sections are available at the top and the bottom of the Results Grid.

#### 4.3.3 Results Grid

The Results Grid displays the list of all the matches found. For each work line the following information is displayed:

- **ISWC.** The ISWC assigned to the work. The 'M' symbol beside a work indicates that the work submission has been merged into another work. The 'D' symbol beside a work indicates that it is a disambiguated work. A '\*' symbol beside a work indicates that the ISWC has provisional status.
- **Original Title.** Original title for the ISWC.
- **Rank.** The search ranking of the ISWC i.e. 1 is the most similar match to your search query and 2 is the 2nd best match to the query, etc.
- **Creator Name(s).** Surname and first name of all Creators.
- **IP Name Number.** The Creator(s) IP Name Number.
- **Submitting Agencies.** List of agencies who have made submissions associated with the ISWC.
- **Original Submission.** Date and time of the original submission.
- Last Update. Date and time of the last "approved" submission for the I
- SWC.
- View More Button. When clicked, expands a more Detailed View of the work selected.

The title and IPs returned in the search results are from the consolidated view of the work, i.e. the title and IP information most recently submitted by ISWC-eligible Agencies. These may differ from the metadata submitted by various Agencies. The metadata submitted by Agencies can be viewed in the 'View Submission History' section of the work.

By default the grid is sorted by descending Rank but can instead be sorted by ascending ISWC or by descending or ascending Original Title, Rank, Original Submission and Last Update. The sorting of these columns can be done by clicking on the sorting arrow  $\stackrel{\checkmark}{}$  at the heading of each column.

#### 4.3.4 Detailed View

The Detailed View is an expandable section which provides you with a complete set of ISWC metadata and action tools available for the selected work. To expand this section, click on the View More button placed in the last column of the ISWC.

The metadata and tools available in the Detailed View section are listed as follows:

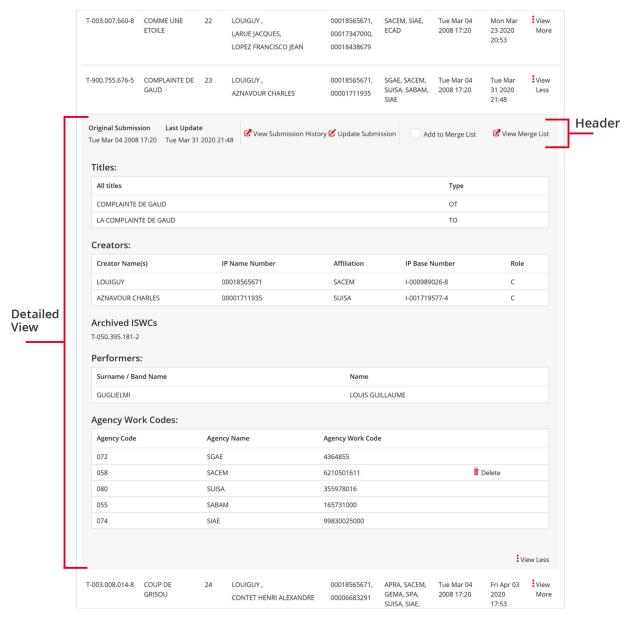


Figure 8 - Results Grid, Detailed View

- **Header.** Provides you with information and a set of links and tools available for the work selected:
  - o **Original Submission.** Date and time of the original submission.
  - Last Update. Date and time of the last "approved" submission for the ISWC.
  - View Submission History. Link that opens a new tab on the browser with the Submission History for the ISWC.
  - Update Submission. Link that takes you to a new page to update the submission of the ISWC (See section 6 for details).
  - o Add to Merged List. Checkbox to add or remove the ISWC from the "Merge List".
  - View Merged List. Link that takes you to the "Merge List" page. This page holds the list of the ISWC's selected by you to merge (See section 7 for details).
- **Titles.** Shows the list of all the titles associated with selected the work. For each Title listed on the work, the Title Name and the Title Type are displayed.

- Creators. Shows the list of all the Creators associated with the selected work. For each
  Creator listed on the work, the Creator Name(s), the Creator(s) IP Name Number, the
  Affiliation (List of agencies that the Creator has a current agreement with), the IP Base
  Number and Roles are displayed. The roles displayed are rolled-up roles and therefore may
  differ from the role submitted to the system:
  - C = C, A or CA.
  - MA = AR, SR.
  - TA = AD, SA, TR.
- Archived ISWCs. If another ISWC(s) has been linked to this ISWC, it will be listed in the Archived ISWC section.
- **Performers.** Shows the list of the Performers of the work. For each performer listed on the work, the Surname and Name of the Performer, or the Name of the Band is displayed.
- Agency Work Codes. Shows the list of all the Agency Work Codes associated with the selected work. For each Work Code listed, the Agency Code, the Agency Name and the Agency Work Code is displayed.

To close the Detailed View of the work, click on View Less located at the bottom of the Detailed View section or in the last column of the opened ISWC.

# 5 New Submission

This page allows you to create a new ISWC submission:

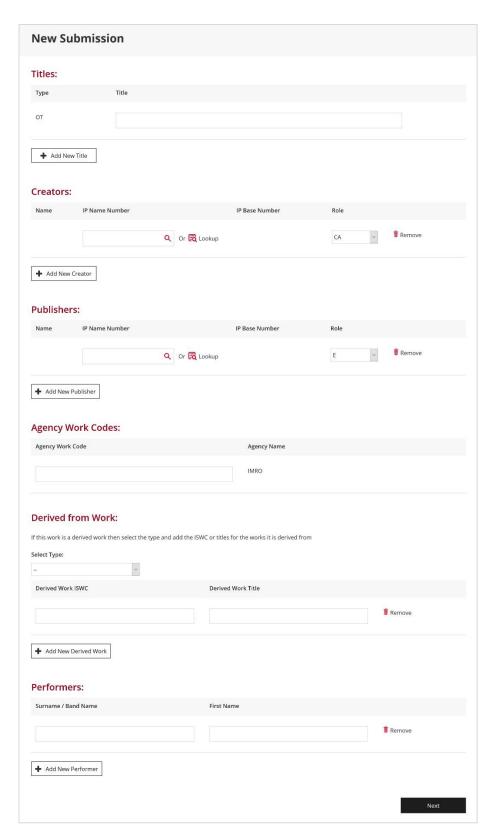


Figure 9 – New Submission

• **Titles.** Add the Original Title (OT) of the work. Add further titles (Alternate Titles etc.) by clicking the "Add New Title" button.

- **Creators.** Enter the IP Name Number of the Creator you wish to add. Alternatively, perform a Lookup using their Name or IP Base number and select the Creator from the results. Add further Creators by clicking the "Add New Creator" button.
- **Publishers.** Enter the IP Name Number of the Publisher you wish to add. Alternatively, perform a Lookup using their Name or IP Base number and select the Publisher from the results. Add further Publishers by clicking the "Add New Publisher" button. Note that Publishers do not display in the search results of the work, only Creators.
- Agency Work Codes. Add your Agency Work Code for this work.
- Derived from Work. If the work is derived from another work, you should select the Type of
  derived work and add the Derived Work ISWC or Derived Work Title for the works it is
  derived from. You can add a new row by clicking the "Add New Derived Work" button at the
  end of the list.
- **Performers.** Add the name of the Performers you wish to add. It can be a band name or the surname of the performer followed but it's first name. Add further Performers by clicking the "Add New Performer" button.

When you finish populating the details on this page, press the "Next" button at the end of the page to continue with the new submission. The application will process the submission and, depending on the information you have submitted, the system will tell you a new Preferred ISWC number has been assigned (see 5.1 below) or a match has been found to an existing ISWC(s) (see 5.2 below).

# 5.1 Preferred ISWC Assigned

If successful, a new ISWC will be assigned to this metadata submission.

You can create another submission with the same metadata by clicking on the button "Copy as a New Submission". This will pre-populate the 'New Submission' page with the same metadata, allowing users to change the required information e.g. Title. Alternatively, click "Make another New Submission" which will take you to a blank "New Submission" page.

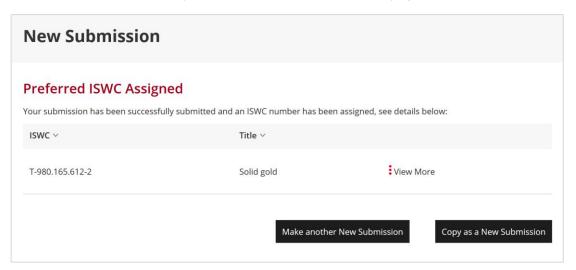


Figure 10 - New Submission, Preferred ISWC Assigned

#### 5.2 Matches Found

In some cases, the newly submitted metadata will match to an existing ISWC. Users can review the metadata of this ISWC by selecting 'View more'. If it is the same work, users can submit their metadata submission to this existing Preferred ISWC (see 5.2.1) or, in the case where it is a unique work, choose 'Disambiguate all ISWCs' to assign a new ISWC (see 5.2.2).

#### 5.2.1 Select Preferred ISWC

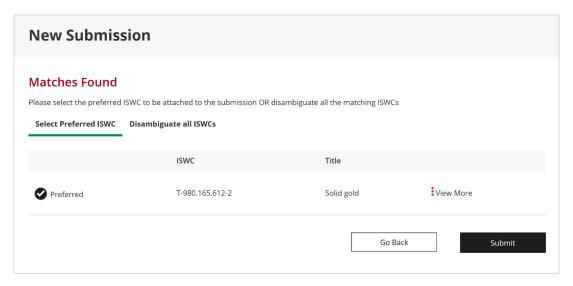


Figure 11 - New Submission, Select Preferred ISWC

### 5.2.2 Disambiguate all ISWCs

If the submitted work has the same Title and Creator metadata as an existing work and ISWC, but it a different work, you can choose to 'Disambiguate all ISWCs' and create a new ISWC for your submission. You must enter disambiguation data, such as the reason why it is a different work, and performer or instrument information:

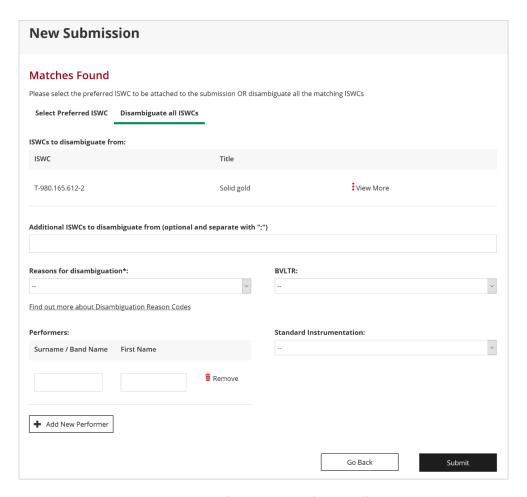


Figure 12 - New Submission, Disambiguate all ISWCs

# 6 Update a Submission

To update a submission of a preferred ISWC, first you need to find the work on the search page and open the "Detailed View" of the preferred ISWC. Within the "Detailed View", click the link

**Update Submission** which will take you to the "Update Submission" page of the preferred ISWC.

\*Note that you will only be able to update submissions from previous submissions done by your society.

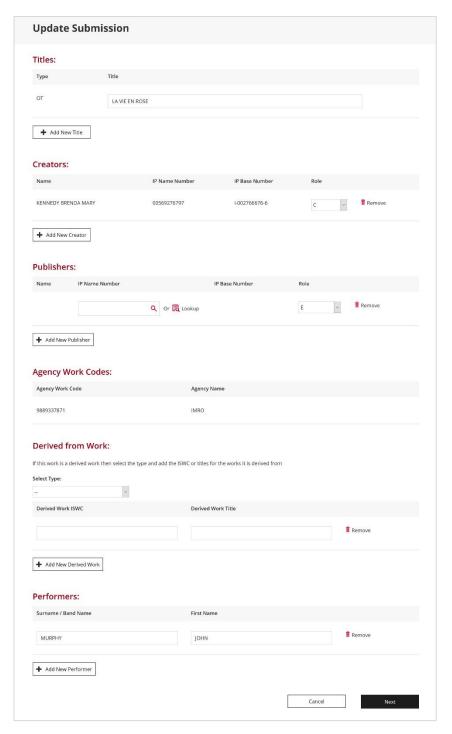


Figure 13 - Update Submission page

The Update Submission page will be pre-populated with the information from the previous submission by your society. You can edit the following information:

• **Titles.** Update current titles and/or Title Type, or add a new title by clicking the "Add New Title" button at the end of the list, which will create a new row on the list for you to populate with details of the new title.

• **Creators.** Update the role of current Creators or remove Creators from the list. The system will display the rolled-up role once updated. Note: you can only remove IPs affiliated with your Agency. You can also add a new Creator by clicking the "Add New Creator" button at the end of the list, which will create a new row on the list for you to populate. To add the new Creator, enter their IP Name Number, or perform a Lookup using the Name or the IP Base number of the Creator and select the Creator from the results.

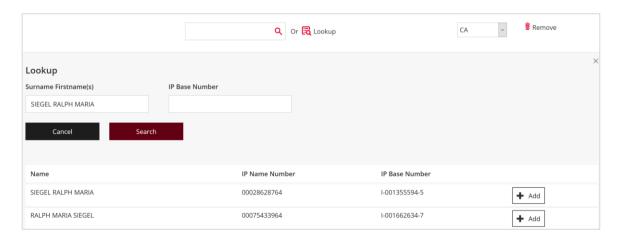


Figure 14 - Update Submission, Creator Lookup

- Publishers. To add a new publisher, enter their IP Name Number, or perform a Lookup using their Publisher IP Name or their IP Base Number You can add a new row by clicking the "Add New Publisher" button at the end of the list. Note: Publishers are not currently displayed in the search results.
- **Derived from Work.** If the work is a derived work, you should select the Type of derived work and add the Derived Work ISWC or Derived Work Title for the work(s) it is derived from. You can add a new row by clicking the "Add New Derived Work" button at the end of the list.
- **Performers.** Update current Performers or add a new Performer by clicking the "Add New Performer" button at the end of the list, which will create a new row on the list for you to populate with details of the new performer.

When you finish updating the details on that page, press the "Next" button at the end of the page to continue with the update of the submission, or cancel the update by clicking the "Cancel" button, which will take you back to the Search page. A description of error messages can be found in the REST Based API specification.

#### 6.1 Matches Found

After you press the "Next" button the system will process the metadata and make a match with one or more preferred ISWCs. The preferred ISWC you are updating will be marked as the default ISWC and will be updated. For information, other ISWCs with similar metadata will also be shown. Your Agency can review these afterwards and merge works if necessary.

Click on the "Submit" button to submit the update.

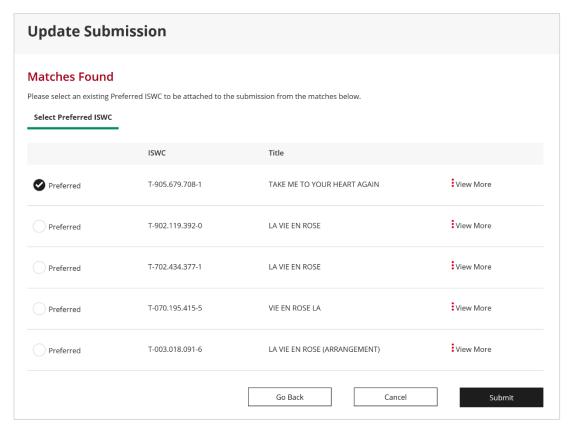


Figure 15 - Update Submission, Matches found

# 6.2 Preferred ISWC Assigned

After submitting the update to the ISWC, the screen will display a successful message and details of the ISWC updated. You can see a summary view of the metadata by clicking on the button.



Figure 16 – Update Submission, Preferred ISWC Assigned

From here, you can create another submission based on the metadata of the current ISWC by clicking on the button "Copy as a New Submission" which will send you to a page with pre-populated

details. Or you can make a new submission by clicking on "Make another New Submission" which will take you the "New Submission" page.

# 7 Merge Multiple ISWCs

You can merge multiple Preferred ISWCs by ticking the "Add to Merge List" checkbox on the "Detailed View" of the ISWC's that you wish to merge.

Once selected, click the link "View Merge List" on any of the ISWC's selected. This will open the "Merge List" page containing the list of the Preferred ISWC's you selected to be merged.

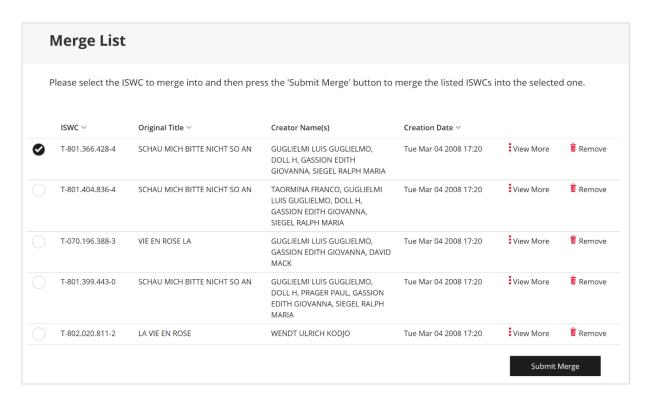


Figure 17 – Merge List page

On the "Merge List" page you can review the list of ISWC's to be merged and you can perform the following actions:

- View the "Detailed View" of any of the ISWC's by clicking on the
- Remove any of the ISWC's from the list by clicking on the Remove button. (Note: All ISWCs on this page will be merged. Take care to only include correct ones).
- Change the default Preferred ISWC to be merge into.
- Submit the merge of the listed ISWC's by clicking on the "Submit Merge" button.

# 8 Delete Submission

As part of the corrections process, users may wish to remove a submission they incorrectly attached to an ISWC. This will then allow them to either create a unique ISWC using the disambiguation feature or attach their metadata to the correct existing ISWC.

In the 'Detailed View' of an ISWC, a trashcan symbol with the word 'Delete' appears beside all submissions made by the logged in Agency (Agencies cannot delete other agencies submissions).

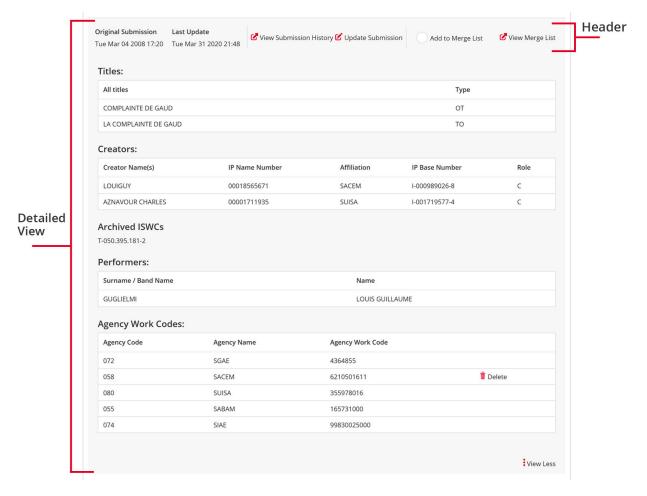


Figure 18 - Delete Submission

The User then selects the submission they wish to remove and clicks 'Delete'. They must confirm this action before the submission is deleted.

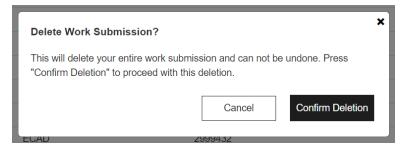


Figure 19 – Delete Submission, Confirmation

### 9 Workflows

Workflow tasks for your Society are triggered when your Agency has ISWC metadata attached to an ISWC for a split-copyright work (where it is an eligible Agency with a submission to the ISWC) and another ISWC-eligible Agency submits a successful update, merge or demerge transaction for that ISWC. You can view your Workflow tasks in the 'Workflows' tab.

#### 9.1 Workflow Results

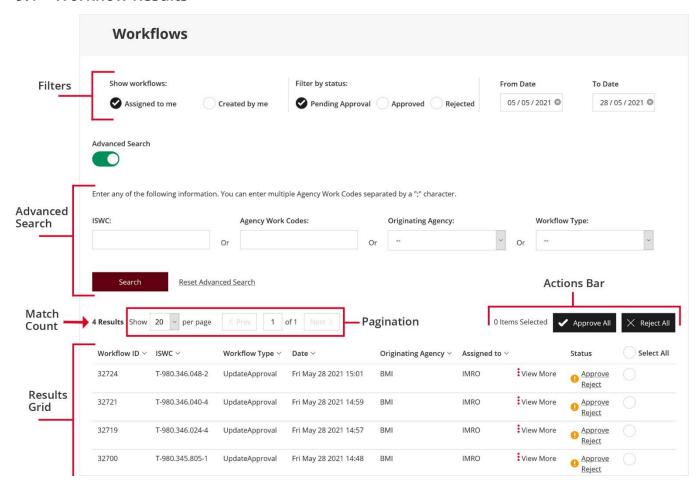


Figure 20 – Workflows

#### 9.1.1 Filters

Here you can filter on workflow tasks which are assigned to your Agency, or workflow tasks created by your Agency (as a result of an update to ISWC metadata). You can also filter on tasks which are pending approval, have been approved, or have been rejected. You can refine the results using the date filters.

#### 9.1.2 Advanced Search

You can search for a particular workflow task by inserting the ISWC or Agency work code in the advanced search. You can also refine the list of workflow tasks by originating Agency or by Workflow Type.

#### 9.1.3 Match Count

This field indicates the total number of entries that matched the search criteria entered by you.

### 9.1.4 Pagination

The Pagination section provides you with a set of options for the display of workflow tasks and navigation between the pages.

When there is a large amount of workflow items to be loaded, instead of showing the number of pages available in the 'Pagination' section, it will display the word 'multiple' and whenever the last page of the results has been reached, the word 'multiple' will change to show the total number of pages.

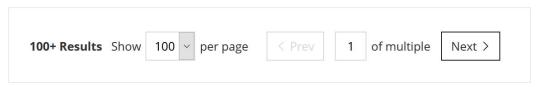


Figure 21 - Workflows, Pagination

The Match Count and Pagination sections are available at the top and the bottom of the Results Grid.

#### 9.1.5 Actions Bar

The actions bar allows you to approve or reject all selected workflow tasks. This defaults to '0 items selected'.

#### 9.1.6 Results Grid

The Results Grid displays the list of all workflow tasks found. For each task the following information is displayed:

- Workflow ID. The identifier assigned to the workflow task.
- **ISWC**. The ISWC assigned to the work.
- Workflow Type. Whether the task relates to a merge, demerge or update submission.
- **Date.** The date the workflow task was assigned to your Agency.
- Originating Agency. The Agency whose submission triggered the workflow task for your Agency.
- **Assigned to.** The Agency the workflow task is assigned to, i.e. your Agency.
- **View More Button.** When clicked, expands a more Detailed View of the work selected.
- **Status.** Indicates if the workflow task is approved, rejected or pending. If pending, your Agency can click on 'Approve' or 'Reject' to complete the task.
- **Select All.** Enables the user to select all tasks on the page and either approve or reject all at once.

# 10 Reports

Reporting capabilities are available to CISAC administrators and ISWC Agencies. These reports can be accessed via the Global Navigation.

The reports and extracts available to be retrieved are the following:

- Submission Audit
- Agency Interest Extract
- ISWC Full Extract
- Agency Statistics
- File Submission Audit
- Publisher ISWC Tracking
- Potential Duplicates

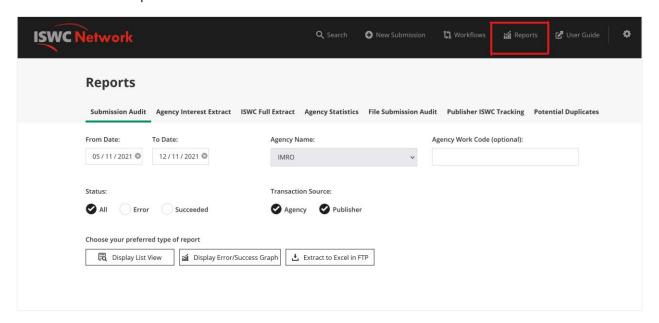


Figure 22 - Reports

#### 10.1 Submission Audit

This enables a society to review all submissions made to the ISWC database. You can refine the report to show submissions made on a specific range of time using the date filters and select the submitting agency.

Submission can also be filtered by status and transaction source. Users can limit the transaction source to 'Publisher' if intending to view submissions made via the ISWC Allocation or Resolution service.

Once all the parameters needed for your report have been set up (Date, agency name, status, transaction source), you can choose between 3 different types of reports:

### 10.1.1 Display List View

Press "Display List View" button to view the report in an onscreen grid (limited to a max of 1000 rows).

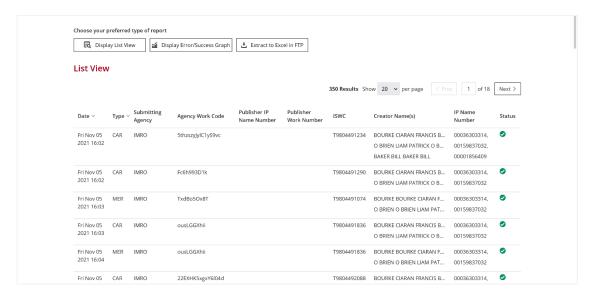


Figure 23 - Submission Audit, List View

The fields included on the grid are the following: Date, Type, Submitting Agency, Submitting Agency Work No., Submitting Publisher IP Name Number, Submitting Publisher Work Number, ISWC, Creator Names, Status (Succeeded or Error). (Error Code and Error Description appear in the status column once a user hovers on the red X)

### 10.1.2 Display Error/Success Graph

Press "Display Error/Success Graph" to view the error/success graph for the 1-month period within the time period selected.

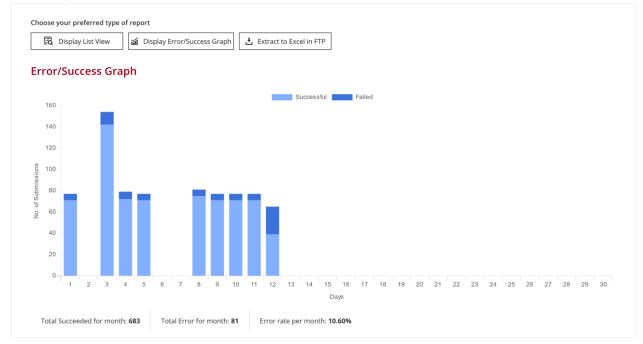


Figure 24 - Submission Audit, Error/Success Graph

The graph will show a stacked bar chart. The Y axis represents the number of transactions that meet the criteria specified in the parameters above for each day in the month shown. The X axis represents each day within the month being shown (month is determined by "From" date). The

series is the number of transactions with status "Succeeded" or "Error". The following totals for the month are shown at the bottom:

- Total Succeeded for month
- Total Error for month
- Error rate per month %

#### 10.1.3 Extract to Excel in FTP

Press "Extract to Excel in FTP" button to generate an excel document with the full results set in the \reports folder of the society ftp location.



Figure 25 - Submission Audit, Extract to Excel in FTP

Once the file is ready all data requested will be extracted in Excel format and transferred to the /Reports folder in your society ftp location on the ISWC Database ftp server. An email will be sent once the file is ready.

The fields included on the extract are the following: Date, Type, Submitting Agency, Submitting Agency Work No., Submitting Publisher IP Name Number, Submitting Publisher Work Number, Creator Names, Status (Succeeded or Error), Error Code, Error Description.

# 10.2 Agency Interest Extract

The enables a society to trigger the generation of an extract of submissions made in a given time period, that link to ISWCs with a creator or publisher who is a current member of that Agency.

You can set up the parameters needed for your report extract which are: "From/to" date, Agency Name (Which defaults to the current agency, but any other agency can be selected), Transaction Source (Agency and Publisher) and IP Agreements "From/To" date.

#### IP Agreements "From / To" date:

Used to determine if the creators on a submission have a current relevant IPI agreement with the Agency selected.

"Current" is determined by checking if the agreement from or agreement to dates lie within the IP Agreement From / To date range selected.

"Relevant" is determined by only considering IPI Agreements associated with the Agency selected with the "MW" creation class. The following economic right types will be considered relevant: MP, OB, OD, PC, PR, PT, RB, RT, TB, TO, TP, TV, MA, MB, MD, MR, MT, MV, SY, DB, RL, BT, RP, ER, RG, RR.

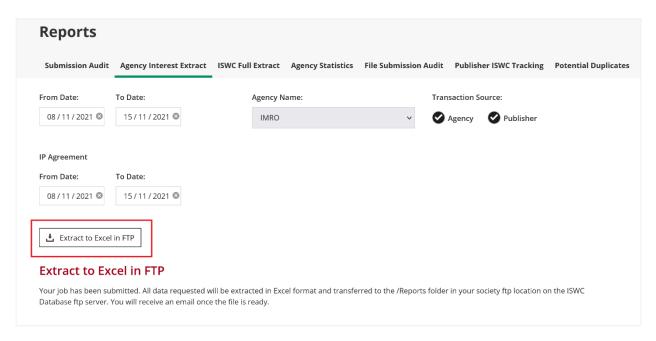


Figure 26 - Agency Interest Extract

Pressing the "Extract to Excel in FTP" button will submit the data requested to be extracted in Excel format and transferred to the/Reports folder in your society location on the ISWC Database ftp server. An email will be sent once the file is ready.

The following information will be provided in the extract: Date, Type, Submitting Agency, Submitting Agency Work No., Submitting Publisher IP Name Number, Submitting Publisher Work Number, Preferred ISWC, Original Title, Creator Name Numbers.

#### 10.3 ISWC Full Extract

This enables a society to trigger the generation of full extract of ISWC information (as per the current quarterly refresh file).

There are 2 options for the extract file that can be retrieved:

#### 10.3.1 Extract Cached Version

This option is set up by default and will extract the most recent full extract file available in cache. The date of the latest version is shown on the screen.



Figure 27 - ISWC Full Extract

#### 10.3.2 Extract Non-Cached Version

This generates a new up-to-date extract of ISWC data. This option can be selected by deactivating the toggle in "Use most recent available cache version?"



Figure 28 - ISWC Full Extract, Non-Cached Version

\*Note that generating this version of the extract will take longer than using the most recent cached version.

When pressing the "Extract to Excel in FTP" button, it will submit the data requested to be extracted in Excel format and transferred to the/Reports folder in your society location on the ISWC Database ftp server. An email will be sent once the file is ready.

# **10.4 Agency Statistics**

This enables the generation of society statistics on a per month and per year basis.

You can set up the parameters needed for your report which are: Agency Name and Time Period.

Once the parameters needed for this report are set up, press the "Show Graphs" button. This will display the information as two doughnut charts. The firs one shows the Total Submissions and the second one the Total of Workflows Assigned.

If the time period selected is "Per Month", the selection of the preferred year and month is available.

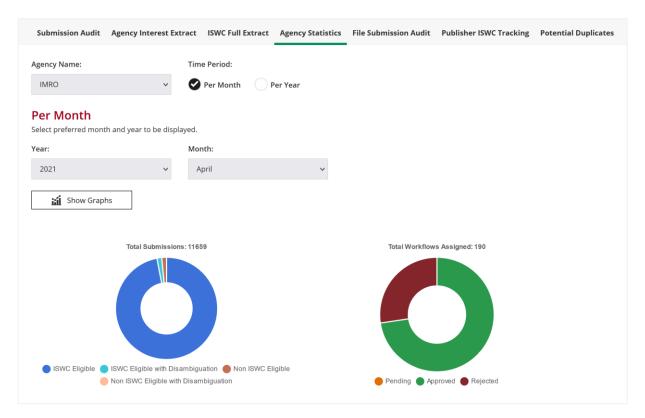


Figure 29 - Agency Statistics, Per Month

If the time period selected is "Per Year". The selection on the preferred year is available.

Users can further refine results in the doughnut graphs by clicking on the relevant coloured references below e.g. in the above, clicking on 'ISWC eligible' by the blue circle, will remove those results from the graph. Clicking again will re-add them.

\***Note** that anytime any of the parameters needed for the report changes, the "Show Graphs" button needs to be pressed again in order to generate the graph with the new parameters selected.

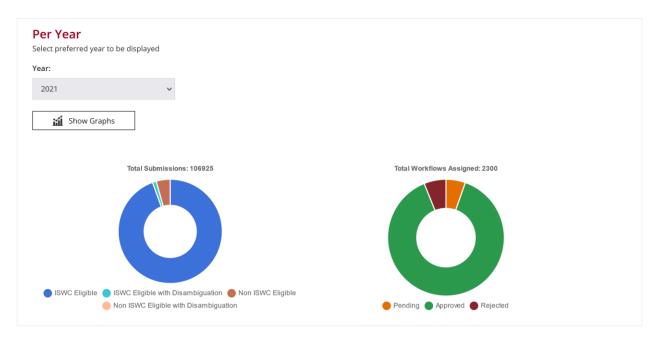


Figure 30 - Agency Statistics, Per Year

#### 10.5 File Submission Audit

This report enables a society to review all file-based submissions made to the ISWC database within a specific set of selectable parameters.

The selectable parameters available are the following: "From" and "To" date range, Agency Name (Which is default to the current agency, but any other agency can be selected), and Transaction Source (Agency and Publisher).

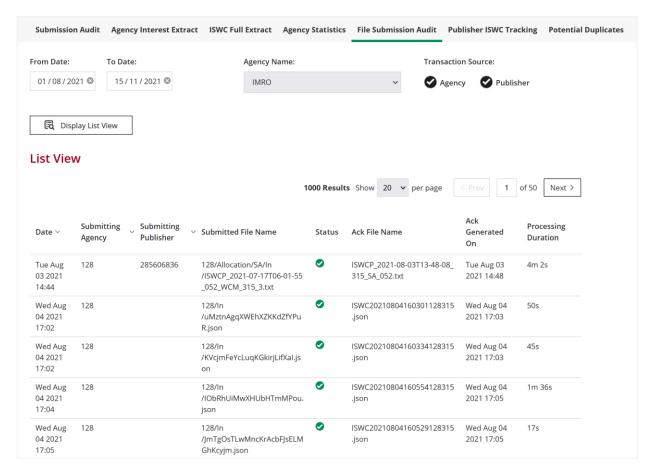


Figure 30 - File Submission Audit

Once the desirable parameters are selected, press the "Display List View" button to view the report in an onscreen grid (limited to a max of 1000 rows).

The fields included on the grid are the following: Date, Type, Submitting Agency, Submitting Publisher, Submitted File Name, Status, Ack File Name (Acknowledgement File Name), Ack Generated On (Date in which Acknowledgement file was generated) and Processing duration.

# 10.6 Publisher ISWC Tracking

This report enables a society to trigger the generation of an extract of ISWC allocation submissions made in the selected time period by publishers. For each ISWC allocated to a publisher, the extract will include the list of societies who made subsequent submissions and show whether or not their submission contained that ISWC number, indicated by either a 'Yes' or 'No' in the 'Related Submission included ISWC' field.

This report was set up to validate that the ISWC returned to a Publisher makes its way to the societies through their CWR ingestion process. For more simple analysis of ISWC Allocation Service submissions by publishers, the normal 'Submission Audit' report is recommended.

NOTE: When selecting an agency, the agency that is currently offering the IAS to the publisher in question must be selected. This may not necessarily be the agency running the report.

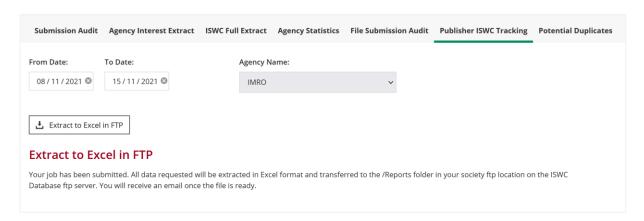


Figure 31 - Publisher ISWC Tracking

Pressing the "Extract to Excel in FTP" button will submit the data requested to be extracted in Excel format and transferred to the/Reports folder in your society location on the ISWC Database ftp server. An email will be sent once the file is ready.

# 10.7 Potential Duplicates

This report enables the generation of an extract with the list of potential duplicate submissions made to the ISWC database within a specific set of selectable parameters.

The selectable parameter available are the following: Agency Name (Which is default to the current agency, but any other agency can be selected), the option to consider only duplicated Original Titles and the date range at which the ISWCs were created.

\*Note that if you want to include all the ISWCs that have been created by the selected agency, just keep the date range fields blank.

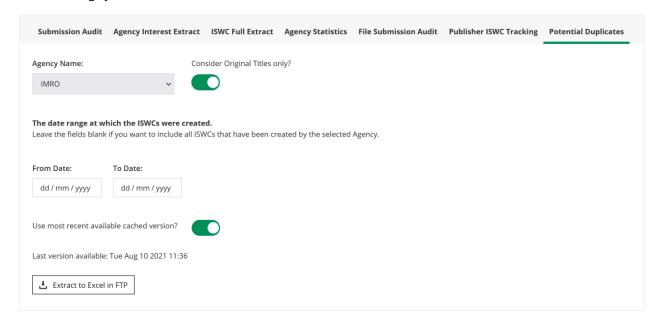


Figure 32 - Potential Duplicates

There are 2 options for the extract file that can be retrieved:

#### 10.7.1 Extract Cached Version

This option is set up by default and will extract the most recent full extract file available in cached. The date of the latest version is shown on the screen.

# 10.7.2 Extract Non-Cached Version

This generates a new up-to-date extract of ISWC data. This option can be selected by deactivating the toggle in "Use most recent available cache version?"

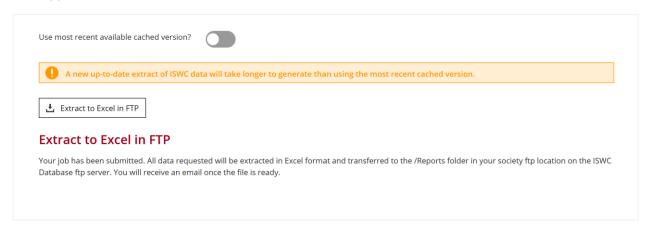


Figure 33 - Potential Duplicates, Non-Cached Version

\***Note** that generating this version of the extract will take longer than using the most recent cached version.

When pressing the "Extract to Excel in FTP" button, it will submit the data requested to be extracted in Excel format and transferred to the/Reports folder in your society location on the ISWC Database ftp server. An email will be sent once the file is ready.

# 11 Portal Permissions

#### 11.1 My Profile

Should a user be permitted access to further functionality, they can request permissions via the **My Profile** dropdown under the **Settings cog.** 

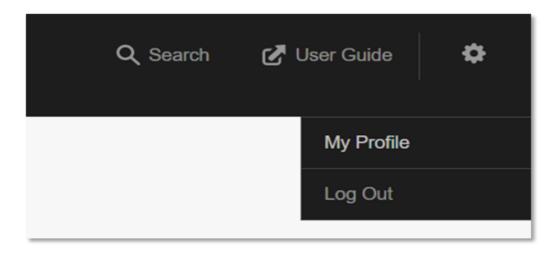


Figure 3 4- My Profile dropdown tab

Within **My Profile**, users can view their Username, Society Code/Name and all 'Assigned and Available Roles'. These include:

#### 11.1.1 User Roles

- **SEARCH (Default Role):** Search menu is available with all sub options. Users who just have this role will have the New Submission, Workflows and Reports options hidden in the menu. "Update submission", "Add to merge list", "View Merge list", "Demerge here" and the "Agency Work Code" delete options will be hidden also.
- **UPDATE:** Makes the "New Submission" and "Workflows" options available in the menu. Also makes the "Update submission", "Add to merge list", "View Merge list", "Merge" / "Demerge" buttons and the "Agency Work Code" delete options available where applicable.
- **REPORT BASICS:** Makes the Reports option available in the menu. Users with just this role will have access to the following report options:
  - Submission Audit
  - Display List View
  - Display Error / Success
  - Agency Statistics
  - o File Submission Audit
  - o Other report options will be hidden.
  - \* Report Basics access must be granted to a user before they can apply for the advanced Report options.
  - REPORT EXTRACTS: This role will enable the following additional report options:
    - o Submission Audit
    - Extract to Excel
    - ISWC Full Extract
    - Use most recent available (cached version cannot be switched)

- o Extract to Excel
- o Publisher ISWC Tracking
- REPORT AGENCY INTEREST: This role will enable the following additional report options:
  - Agency Interest Extract
- REPORT ISWC FULL EXTRACT NOT CACHED: This role will enable the user to switch off the "Use most recent available cached version" in the ISWC Full Extract report.
- MANAGE ROLES: This role will enable the user (CISAC or CISAC approved) to approve or reject new role requests or add/remove roles from users.

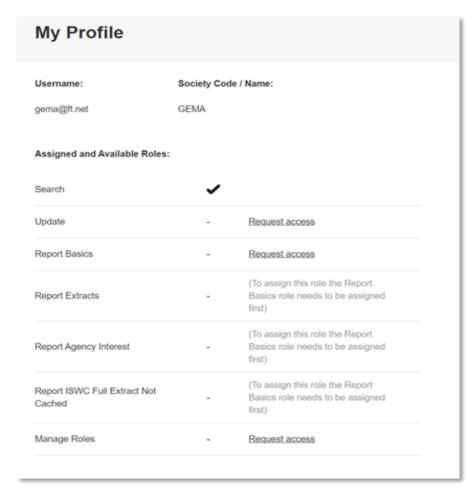


Figure 35 - My Profile Assigned and Available roles

# 11.1.2 Request Permissions

Users request access for the desired role by selecting the relevant **Request Access** option. A text box will allow the user to include their **Reason for requesting access.** 

Users should also email <a href="mailto:iswc.support@cisac.org">iswc.support@cisac.org</a> to advise of the request.

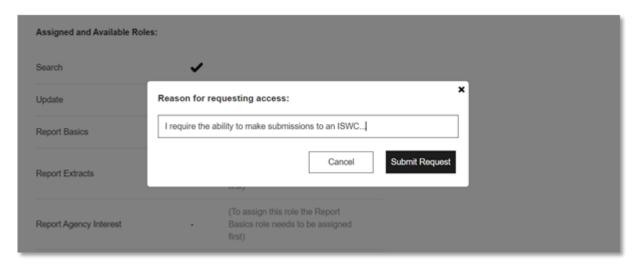


Figure 36 - Example of Request Reason text

Once submitted, the desired request will display as **Pending Request.** 

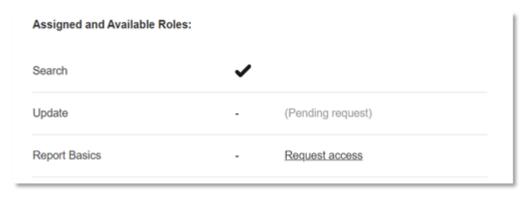


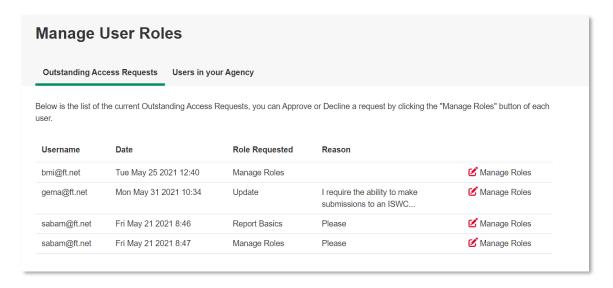
Figure 37 – Pending Request view - User

# 11.2 Manage User Roles

The CISAC administrator can view all **Outstanding Access Requests** via the **Manage User Roles** dropdown under settings. Only CISAC, and society users granted the **Manage Roles** permission by CISAC, can access this option.

Within, they can view the following information relating to the user submitting the request: Username, Date, Role Requested, Reason.

The **Manage Roles** option allows them to **approve** or **decline** the request.



By clicking **Users in your Agency**, CISAC / Society Administrator can view the roles currently granted to all users affiliated with their agency (or in the case of CISAC, all users).

# Example of IMRO UAT account:

