WorldShare Acquisitions release notes, June 2018

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Release Date: June 28, 2018

Introduction

This release of WorldShare Acquisitions provides three new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Supporting cost that include taxes
- Searching for items more quickly by
  - Not loading search results automatically
  - Defaulting order item search to title instead of keyword

Many of these enhancements are the direct result of your feedback.

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 action or decisions.

<table>
<thead>
<tr>
<th>ACTION</th>
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<tr>
<td>None at this time.</td>
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Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.
Consider whether you want to use the Tax Calculation setting of "Include tax in costs" on your orders or invoices. This feature applies to any library that uses vendors that provide costs that include taxes.

Instruct your staff that they need to click on the search button when finding an order or invoice. Alternatively, you can create saved searches for searches that you visit frequently.

**New features and enhancements**

**Costs include taxes**

You can now include taxes in your costs on both the order and invoice and have the tax amount calculated correctly. If your vendor provides costs that include taxes, this will save you time and effort by allowing you to simply enter these costs (as provided by the vendor) directly into the system instead of having to first calculate the pre-tax amount.

Note: Vendors in many countries supply costs that already include taxes. If your vendors do not provide costs that include tax, you can choose to not use this feature by simply leaving the Tax Calculation setting on the order and invoice to your existing setting.

**New tax handling field**

It should be noted that this feature changes one of the existing settings on the order and invoice by moving the "Include tax on service charges and shipping" field to the Tax Handling field on both the order and invoice. To enter costs that include taxes, you simply need to select the new "Include taxes in costs" option for this Tax Handling field.

Previously, you could change the way the tax amount was calculated by checking or un-checking the box marked "Include tax on service charges and shipping."
This would determine if the system calculated the tax amount for each item by multiplying your tax percentage by the price (un-checked) or by multiplying the tax percentage by the sum of the price, service charges, and shipping.

These two tax calculation settings are still available in the system but are now contained under the "Tax Handling" field. The three options for this field are:

1. **Tax item cost** (same as un-checking Include tax on service charge and shipping box) - Calculates tax amount by multiplying tax percentage by the price
2. **Tax item, service charge, and shipping cost** (same as checking Include tax on service charge and shipping box) - Calculates tax amount by multiplying tax percentage by the price, service charges and shipping
3. **Include taxes in costs** (new option) - Calculates tax amount by considering it as included in price, service charges, and shipping

This new Tax Handling field appears in six places in the system:

1. New Order dialog
2. Order details page
3. New Invoice dialog
4. Invoice details page
5. Import EDIFACT invoice dialog
6. Import EDIFACT invoice job

To set the Tax Handling field on the order during creation, use the New Order dialog:
To set the Tax Handling field on the order after creation, use the Order details page:
To set the Tax Handling field on the invoice during creation, use the New Invoice dialog:
To set the Tax Handling field on the invoice after creation, use the Invoice details page:

In the Tax Handling section, select the option to include taxes in costs.

Invoice details:
- Invoice Number: 0283842394
- Invoice Date: 15/01/2015
- Vendor: Collins Publishing
- Tax Handling: Tax item, shipping and service costs

Currency: AMD Armenian dram
To set the Tax Handling for EDIFACT invoices when importing, use the Import EDIFACT invoice dialog:

**Import Data**

- **Type:** Import invoice data (EDIFACT)
- **File Location:** Choose File (No file chosen)

**Note:** Invoice file needs to be in EDIFACT format

**Tax Handling:**
- Include taxes in costs
- Tax item cost
- Tax item, shipping and service costs
- Include taxes in costs

To set the Tax Handling for EDIFACT invoice import jobs, use the jobs editing/creation page:

**Vendor ID (Optional)**

**Source Folder**

- **File Type**
  - All Files
  - File extension

**Post Processing**

- Leave files in source folder
- Move files to folder

**Tax Handling**

- Include taxes in costs

**Schedule**

- Daily - Time (hh:mm)
- Manual
- Inactive

**Notify**

- Paul Wolfinger
Note: The default selection for all these fields is still determined by the Acquisitions settings of the institution. (This setting also determines the Tax Handling for orders that are imported into the system.) If you want to change your institution's default setting for this field, please contact Customer Support, and they can change this setting for you.

Include taxes in costs

To include your taxes in the costs entered into the system, you need to simply select this option for the Tax Handling field. To do this, you need to:

1. Click New Order on the Orders page or New Invoice on the Invoices page.
2. Select the Tax Handling setting Include taxes in costs.
3. Go to the Order or Invoice page.
4. Enter the costs as provided by the vendor (including taxes).
5. Pay invoice or place order as normal.

Searches do not load automatically

In order to improve performance and to stop unnecessarily loading searches you do not need, we will no longer load search results automatically upon loading most search pages. Instead, you click the search button to load the search results.

Note: You simply enter your search terms on the Receive and Invoice page instead of clicking search button.

Previously, it might take several seconds to load a search results page containing all search results for your institution (e.g. all orders, all order items, or all invoice items) before you could enter a search term. Now, the system will not automatically load search results unless you enter a search or click the search button. This saves you the time of waiting for a page to load that does not typically contain the object for which you are looking.

This change applies to the following pages:

1. Orders search: Orders > Orders
2. Order items search:
   ◦ Orders > Order Items
   ◦ Orders > One-Time Items
   ◦ Orders > Subscription Items
   ◦ Orders > Missing Order Items
4. Receiving page: Receive and Invoice > Outstanding Items
5. Invoices search: Invoices > Invoices
6. Invoice items search:
   ◦ Invoices > Bibliographic Invoice Items
   ◦ Invoice > Non-Bibliographic Invoice Items
Note: Saved searches as well as search results listing saved searches still open automatically, since you would not typically want to enter search terms for these searches.

**Order item search defaults to title search**

The order item search now defaults to the title search, which results in order item searches returning much faster than the previous Keyword search. You can still select the Keyword search or one of the other searches, but the default search for order items is the much faster title search.

**Bug fixes**

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2018_rele...
Branch for order items set to log-in branch

The default branch of order items is now set to the log-in branch. Previously, the branch was being set to the first branch in alphabetical order, rather than the branch you were logged into. Now, it works correctly and sets the branch of order items to the log-in branch order or branch of the order item template used.

Invoice number link in Items Processed section links to invoice

The invoice number link in the Items Processed table on the Outstanding Items screen now properly links you to the invoice details page. Previously, the link in the table in the Items Processed section would give an error message rather than linking to the invoice. Now, it links directly to the invoice.

Important links

Support website(s)

Support information for this product and related products can be found at:

- [WorldShare Acquisitions](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2018_rele...)
- [OCLC Community Center](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2018_rele...)
- [Browser compatibility chart](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2018_rele...)

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