WorldShare Acquisitions release notes, September 2018

Release Date: September 27, 2018

Introduction

This release of WorldShare Acquisitions provides 7 new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Ordering of resources not in WorldCat or the WorldCat knowledge base
- Receiving and invoicing items in an improved way
- Managing resources for non-bibliographic invoice items
- Adjusting invoice item totals manually
- Withdrawing an item
- Viewing total tax amount on invoices
- Searching all invoice items together
- Add a privacy notice for staff and patrons

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.
Train staff in new method for creating non-bibliographic invoice items. This now involves creating a local resource as part of creating the non-bibliographic invoice item. See the section on Manage resources for non-bibliographic invoice items.

Train staff in new method for accessing Receiving and Invoicing screen. This can now be done by first selecting a Processing Type from the dropdown and clicking on the View Items button (rather than Outstanding Items button) in the Receive and Invoice section. See the section on Improvements to receiving and invoicing process.

Follow-up actions

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

See administrative actions above.

New features and enhancements

Order resources not in WorldCat or the WorldCat knowledge base

You can now order resources not in WorldCat or the WorldCat knowledge base. This allows you to acquire items that are not informational materials without first putting them in WorldCat or the knowledge base. This includes:

- Memberships and association fees
- Furniture (e.g. table, chairs, etc.)
- Office supplies
- etc.

Previously, in order to acquire an item that was not in WorldCat or the WorldCat knowledge base, you had to add these items to WorldCat or the knowledge base and then you could order the item. Now, you can create, manage, and order "local resources" that are not in WorldCat or the knowledge base. These can include any type of item that might not belong in one of these databases.

To acquire a resource not in WorldCat or the knowledge base, you need to:

1. Open the "Local Resources" menu on the left of the screen under "Discover Collections."
2. Click Create Local Resource button at the top of screen.

3. Fill out Local Resource details, including:
   - Name (Maximum: 100 characters)
- **Description**
- **Default Acquisitions Type:** This will determine the default Acquisitions Type of the item when ordered.
- **Status (active or inactive):** Only active resources can be ordered.

<table>
<thead>
<tr>
<th>New Local Resource</th>
</tr>
</thead>
<tbody>
<tr>
<td>Save</td>
</tr>
</tbody>
</table>

* Required field

- **Local Resource Name**<sup>*</sup> OCLC Membership
- **Description**
  Membership to OCLC and accompanying fees.
- **Default Acquisition Type**<sup>*</sup> One-Time
- **Status**<sup>*</sup> Active

4. Click save when finished.

5. Now, you can immediately add the item to an Order or Purchase Request using the buttons at the top of the page.

6. Or, you can search for Local Resources previously added and add them to an Order or Purchase Request.
   - You can search by Name or Description of the Local Resource.
   - You can also filter Local Resources by Default Acquisitions Type and Status.
When you are done searching or a Local Resource, you can add it to an Order or Purchase Request using the button on the right-hand side of the screen.

7. You can also update Local Resources by clicking the Local Resource name link and then updating the Name or Description. (Warning: This will update all items ordered using this Local Resource as well.) Also note: The Date Create and Date Last Updated appears at the bottom of the Local Resource page.

8. You can even delete Local Resources using the button at the top of the Local Resource page but only if they have never been used for ordering or invoicing.
9. To search for order items and purchase requests that use Local Resources, use the Processing Type "Local."

10. To receive order items that use Local Resources, you must select one of the following options from the Processing Type dropdown under Receive and Invoice:
   - Local - One-Time: This shows all Local Resource items that have the Acquisitions Type of One-Time.
   - Local - Subscription: This shows all Local Resource items that have the Acquisitions Type of Subscription.
11. To view more details about an order item using a Local Resource, hover over the info icon.

12. To change a local resource for an order item to another local resource, use the "Change Resource" button in the top of the info icon popup.
Note! You cannot change a resource for a local resource order item to a WorldCat or WorldCat knowledge base resource. You can only change a local resource order item to another local resource. To order items not in WorldCat or the knowledge base yet - but should be - please create a WorldCat or knowledge base record.
Improvements to receiving and invoicing processes

You can now receive and invoice items in an improved way in Acquisitions. These changes both aim to help new users learn the system for the first time as well as streamline workflows for existing users.

Processing Type dropdown instead of tabs

One of the most significant changes is the replacement of the Mono., Serial, and E-Prod. tabs in the Receive and Invoice section with the Processing Type dropdown menu.

Old way

New way

This change not only uses a more familiar dropdown menu (rather than tabs) to aid both new and existing users, but it also allows us to list the new the 2 new Local Resource processing type options in the Receive and Invoice screen.
View items button instead of Outstanding Items

Another significant change is that you will now click on View Items button (below the Invoice Number field) instead of Outstanding Items to view the list of items to receive and invoice.

### Old way

```
Receive and Invoice

ProcessingType
- Monograph
- E-Product
- Local - One Time
- Local - Subscription
- Monograph
- Serial

Invoice Number

New Invoice

Outstanding Items

Mono. Serial E-Prod.

Action
- Receive & Invoice

Vendor

Invoice Number

Print Labels
```

### New way

```
Receive and Invoice

ProcessingType
- Monograph

Action
- Receive & Invoice

Vendor

Invoice Number

View Items

Print Labels
```
New Invoice button below invoice number

Additionally, the New Invoice button is now below Invoice Number in the Receive and Invoice section.

Old way

New way

This places the New Invoice nearer the Invoice Number selection box and more in-line with the top-to-bottom flow of the page.

Search defaults to Title search

In order to improve the performance of the Receive and Invoice page, the search now defaults to a search by Title instead of Keyword. The Keyword search is still available, but you will need to select Keyword from the new search dropdown menu on the Receive and Invoice page.
Additionally, you can choose to search by other fields such as:

- Copy Number (more on this below)
- Barcode
- Invoice Number
- ISBN
- ISSN
- Order Item Number
- Order Number

Note! Results will return faster when searching by one of these fields rather than the Keyword search.

**One row per copy for Monographs**

If you order multiple copies of a Monograph order item (e.g. quantity = 3), you will now see each copy as a single row in the Receive and Invoice screen. This was the case previously for Serials and E-Products but is now the case for items of all processing types. This allows you to view the Copy Number for each monograph copy as well as see at a glance how many copies you have to receive.

**Easily put items with different processing types on one invoice**

You can now easily put items with different processing types on the same invoice. Previously, you had to select the invoice each time you selected a different Processing Type when receiving and invoicing (e.g. Mono., Serial, or E-Prod.) Now, you can select an invoice when using one Processing Type and have that selection remain after selecting another Processing Type.

Simply select an invoice during receiving or invoicing. (Or create a new invoice.) And then change the Processing Type. The screen will NOT refresh and your invoice selection will stay the same.
Search by and view copy number

You can now search by the Copy Number (as mentioned above) as well as view the Copy Number in the results on the Receive and Invoice screen. To view the Copy Number, simply click on the gear icon and enable the Copy Number column.

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Copy Number</th>
<th>Order Number</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>es</td>
<td></td>
<td>PO-2015-46971-1-1</td>
<td>PO-2015-46971</td>
<td>OCLC</td>
</tr>
<tr>
<td>dirk</td>
<td></td>
<td>PO-2015-68368-1-880</td>
<td>PO-2015-68368</td>
<td>OCLC</td>
</tr>
</tbody>
</table>

Manage resources for non-bibliographic invoice items

You can now manage a controlled list of resources for non-bibliographic invoice items as well as for order items. This allows for better control over what you are invoicing and how invoiced resources are described. This functionality is an extension of the Local Resources feature described above and entails changes to how you create non-bibliographic invoice items.

To create a non-bibliographic invoice item, you will need to:

1. Start by clicking the Add button on the invoice page, just as you did before.
2. You will now be presented with a dialog where you can select an existing local resource or create a new local resource for the invoice item. (This is a change from previously when the invoice item would be immediately be added to the invoice with an empty description.)
3. If you are creating a non-bibliographic invoice item for a new resource, click Create Local Resource at the top of the page.

4. In the subsequent dialog, enter the resource information for the new non-bibliographic invoice item and click Create.
5. Your newly created item will appear in the Local Resource table. Click on the title link to add the item to the invoice.

6. This will add the item to the invoice item with the resource description you have entered.
7. You can change a resource for a non-bibliographic invoice item by hovering over the info icon and clicking Change Resource.

A few final notes about this functionality:

- You cannot delete a local resource that has been used as the resource for a non-bibliographic invoice item.
- When importing EDIFACT invoices, we will create a Local Resource called Taxes, Service Charges, or Shipping for these charges if these do not already exist in the Local Resource list.
- If an invoice item lacks a description entirely (as could be the case for Open invoices in progress), we will create a Local Resource with the name of the Invoice Item type: Debit, Credit, or Refund. If you have any open Invoices, it is recommended to review them for these types of items and change the resource if they exist prior to payment of the invoice.
**Adjust total of an invoice item**

You can now manually adjust the total for an invoice item from the invoice page. This saves you the time and effort of adjusting other pricing fields if the calculated total does not match the total on the invoice. Previously, if the calculated total of an invoice item did not match the total on a paper invoice, you had to adjust one of the pricing fields (e.g. Unit Price, Service Charges, Shipping, etc.) in order to calculate a new total. Now, you can simply adjust the final total of an invoice item manually to match the item total on the paper invoice.

The first thing to note about this feature is that there will now be two "total" fields on the invoice page:

1. **Calculated Total**: The total calculated by the system based on the pricing fields on the invoice item.
2. **Total (or Adjust Total)**: The actual amount expended when the invoice is paid. This may be equal to the Calculated Total or could be a new total you have entered manually.

Hovering over the calculate total shows you how the total can be broken down into its various elements (e.g. Discount, Tax 1, Tax 2, Shipping, Service Charges, and Total Price).
On the other hand, the Total (or Adjusted Total) is a link, which you can click to adjust the total of the invoice item manually. (This process is explained in more detail below.)

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Unit Price</th>
<th>Discount (%)</th>
<th>Service Charges</th>
<th>Shipping</th>
<th>Tax 1 (%)</th>
<th>Calculated Total</th>
<th>Total</th>
<th>Custom Fields</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>34.00</td>
<td>10.00</td>
<td>1.00</td>
<td>1.00</td>
<td>5.00</td>
<td>34.23</td>
<td>34.23</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To adjust the total of an invoice item, you need to:

1. Click on the amount link in the Total column. (See above.)
2. In the subsequent dialog, select “Use New Amount”, manually enter the new amount you want to use for the invoice item total, and click Update.

![Update Total dialog]

3. The new total for the invoice item will be reflected on the invoice screen.
4. Additionally, if you want to view how much you have adjusted the Calculated Total, you can use the gear icon to reveal the amount of the Adjustment. (This can be a positive or negative amount and is automatically calculated based on the difference between the Calculated Total and your entered amount.)

![Image of the adjustment feature]

5. If you decide you want to go back to using the Calculated Total, click on the Total amount link again and select Use Calculated Total in the dialog.

![Image of the update total dialog]

Note! If you later change one of the pricing fields for an item where the total has been adjusted, the change will not be reflected in the total of the invoice item. Instead, the user-entered amount will be used as the Total. For this reason, you should only use this feature when all changes to the invoice have been made and you simply want to adjust the total of an item to reflect what is on the invoice.
Withdraw an item

You can now withdraw copies of monograph order items. This allows you to simultaneously set the Receipt Status of the copy to Withdrawn and delete the associated Local Holding Record. This also provides a record that the item was withdrawn. This action cannot be undone so be sure you want to remove the item in question from your collection before using this feature.

To withdraw an item from your collection, you will need to:

1. Open the Receive and Invoice section in the left-hand menu.
2. Select Monographs for the Processing Type and Receive (or Receive and Invoice) for the Action.
3. Set the Receipt Status in the top of the page to “Received.”
4. Search for the item using the search box in the upper left.
5. A withdraw button will appear in the Receipt Status column. Click the Withdraw button.
6. Item is withdrawn and the corresponding Local Holding Record deleted.

View tax amount on order and invoice

You can now view the Tax Amount for an item on the order and invoice. This amount is the actual currency amount for both Tax 1 and Tax 2 summed together. (The Tax 1 and Tax 2 fields themselves show percentage rates, rather than currency amounts.)
To enable this field, simply click on the gear icon above the items table on either the order or invoice and click the checkbox next to the Tax Amount field.

Search invoice item types together in one search

You can now search bibliographic and non-bibliographic invoice items together in one search. Previously, you had to search for bibliographic and non-bibliographic invoice items in separate search screens. Now, you can search both from a single search and view results together as well.
Add a Privacy Notice for Staff and Patrons

Institution administrators can now request OCLC to add an institution-defined privacy notice to the staff and patron login step for many OCLC services including WorldShare Acquisitions.

If you add a privacy notice, it will be displayed after the staff or patron is presented with their login screen. The number of times the privacy notice is displayed is based on the timeframe configured for the institution.

To request the addition of a privacy notice for your institution, please contact OCLC support in your region.

To illustrate an example, below are three screenshots that show the sequence for displaying the privacy notice. Once you login (first screenshot) you are presented with the privacy notice (second screenshot). Once you click on ‘Continue’ or if ‘Continue’ is not selected after 40 seconds have passed, then you progress to your application (third screenshot)
Bug fixes

All automated job notifications go to user specified in job

All automated job notifications - for both the overall job and for any imports that are part of the job - now go to the user specified in the Notify section of the Automated Job. Previously, the import e-mail notifications were going to the person who created the job and not the person specified as the notification contact. Now, all notifications related to a job go to the user specified in the job.

Requestor editable even after receiving

The requestor field is now editable even after an item has been received. Previously, this field was not editable after an order item was received. Now, it is editable at all times.

Order item saved search now display search dropdown to left of search box

The search index dropdown now appears to the left of the search box for all order item searches, including saved order item searches. Previously, the search index dropdown moved to the right of the search box when used in saved order item searches. Now it appears to the left of the search box at all times.

Known issues
Missing Product Type filters for invoice items

The new invoice item search combines the previous bibliographic and non-bibliographic invoice item searches. However, the Product Type filter is missing from this new invoice item search, so that you cannot filter invoice items to only bibliographic or non-bibliographic invoice items. This will be fixed in an upcoming release, but for now, you cannot filter your invoice items by this type. Note! Existing saved searches (using the previous bibliographic and non-bibliographic searches) should continue to filter by the Product Type. Additionally, this distinction is still maintained in Analytics.

Important links

Post release sessions

To help you become familiar with the new features, enhancements and improvements included in this release, there are [number of update sessions] update sessions scheduled. Please note the session time zones when registering. The sessions will be recorded and archived for future viewing on the OCLC Community Center. Please register, even if you are unable to attend, to receive a link to the recorded session.

WorldShare Management Services release update session

Date: Thursday, October 4, 2018, 12:00pm, Eastern Daylight Time (New York, GMT-05:00)

Registration: https://oclc.webex.com/oclc/k2/j.php?MTID=td987f8768ba4779f2b8411e0e83ccad1

Support website(s)

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

- OCLC Community Center
- Browser compatibility chart