WorldShare Acquisitions release notes, January 2019

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Release Date: January 29, 2019

Introduction

This release of WorldShare Acquisitions provides 4 new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Sending custom notification text to vendors for orders, claims, and cancellation messages
- Using WorldCat resources as e-products
- Claiming of plan items
- Including links and line breaks in Claim comments
- Enhanced searching options for Discover Items

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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<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.

**ACTION**

Review policies and procedures to see if your library wants to send custom notification text with any of the vendor messages supported by WMS.

New features and enhancements

Support for custom notification text

You can now configure and send custom text with your vendor notifications. Previously, you could only provide a freetext comment for claim notifications, but with custom notification text, you can pre-configure the text you want to send to the vendor and then simply select it when you send any vendor message. This saves you the time and effort of communicating common messages to vendors.

To configure and use custom notification text, you need to;

1. Click on Settings > Institution Settings in the left-hand menu.

2. Click on the Custom Notification Text accordion menu in the main panel.
3. Click Create Notification Text.

4. Enter the following fields for the Notification Text:
   - Name: Unique name to identify the specific notification text you are configuring.
   - Type: Type of message for which you want this text to be available for selection. Options include Orders, Order Item Claims, Serial Issue Claims, and Cancellations.
   - Text: Text that you want to appear on the vendor notification.
5. The text may include line breaks and links, such as [http://worldcat.org](http://worldcat.org). Links will appear as HTML links in the notification message.

6. You can view all custom notification texts in the table below the Create Notification Text button.

7. You can delete a custom notification text by clicking the delete icon in the far right of the table.

8. Once configured, you can select this custom text when sending a message to a vendor. To select this text when sending an order, claim, or cancellation message, you first need to select Notify Vendor when performing one of
these actions.

9. You then need to select the Custom Text you want to include on the message from the dropdown menu.

10. You can still provide an Additional Comment for claim messages.
Using WorldCat resources as e-products

You can now select the Processing Type of E-Product for order items that use WorldCat resources. Previously, you could only select Monograph or Serial for WorldCat order items. Now, you can select Processing Type E-Product for WorldCat resources such as e-books, e-journals, and databases. This will allow you to use WorldCat or the WorldCat knowledge base to record orders for electronic resources.

To select the E-Product Processing Type for WorldCat resources, you need to:

1. Search for the item under Discover Items.
2. Add the item to an Order or Purchase Request using the "Add to" button on the right-hand side of the page.
3. The Processing Type will automatically be set to Electronic Product for items like e-books and e-journals. If not selected, simply select it from the dropdown.
4. The Processing Type of Electronic Product will be applied to this item.

Claiming of Plan Items

You can now claim items that belong to one of the Plan order types. This includes orders with type Approval Plan, Blanket Order, DDA Plan, Gift/Donation List, Legal Deposit List, and Standing Order. Previously, you could only claim orders of type Purchase Order. However, now, you can claim orders of any type. This will allow you to claim items such as Approval Plan items for which you received notification slips but never received the item.

To claim a Plan item, simply use the same procedure as claiming Purchase Order items:

1. Go to Orders > Order Items
2. Search for the item(s) you want claim
3. Select the item(s) using the checkboxes on the left of the table.
4. Click Claim at the top of the page
5. Click Notify Vendor, if applicable.
6. Confirm claiming of the items.

Including line breaks and links in Claim comments

You can now include line breaks and properly formatted HTML links in Claim comments. Previously, comments for claims would be in a single block of text and links would be presented a plain text as well. Now, you can use the enter key to include line breaks in your claim comment, and any links you include in the comment (e.g. http://worldcat.org) will be presented in the vendor message as properly formatted HTML link.
Enhanced searching options for Discover Items

Two new enhancements related to searching WorldCat are now available in Acquisitions under Discover Items. In December 2018, Metadata added additional indexes when searching LHRs. These were added to Acquisitions Discover Items with this release. Additionally, Metadata had located user preferences into a single location earlier in the year. This enhancement is also now available in Discover Items.

Bug fixes

Copy Number now matches copy number in Analytics

The copy number that appears on the Receive and Invoice screen now always matches the copy number used in Analytics. Previously, sometimes the copy number in Acquisitions did not match the copy number in Analytics. This only occurred for order items where the quantity was greater than 1 and only when you received these copies in a different order than they are displayed in the interface. This no longer occurs. The copy numbers should always match now.

Withdraw button has confirmation dialog

Withdrawing a copy of an item now requires confirmation. Previously, you could withdraw an item without the system requiring you to confirm the action. Now, the system uses the standard procedure for any action that will delete information and requires a confirmation when withdrawing an item.

Important links

Support website(s)

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

- WorldShare Acquisitions
- Contact OCLC Support
- OCLC Community Center
- Browser compatibility chart