View and edit an order item

Last updated: Mon, 19 Dec 2022 16:01:40 GMT

Discover how to locate and edit open and placed order items in WorldShare Acquisitions. You can search for and edit your open and placed order items.

Search for order items

1. On the left navigation, click Orders > Order Items.
2. Click Search. All order items appear. Or
   From the drop-down list, select an index and enter the search term(s). Click Search.
   ◦ Results are sorted alphabetically by title.
   ◦ To change the sort order, click any column heading.
   ◦ Filter order items by using the filters at the top of the page.
3. Click the Title to view or edit the order item.

View the WorldCat record for an order item

You can view the WorldCat bibliographic record for an order item in WorldShare Record Manager or your WorldCat Discovery instance. This allows you to verify that the record for a received item is correct by:

• Viewing the metadata and, if needed, editing a record before receiving (Record Manager)
• Viewing the patron-facing record (WorldCat Discovery)

Note: This functionality does not apply to items with either of the following processing types

• Electronic Product
• Local

1. Click the Title of an order item to open the Order Item Details screen.
2. From the Order Item Details screen, hover over the information icon (i) next to the order item title.
3. The information pop-up window provides the following links:
   ◦ View/Edit Metadata - Click to open the full MARC 21 bibliographic record in Record Manager. This link only appears if you have permission to view Metadata.
   ◦ View in WorldCat Discovery - Click to open the bibliographic record in your WorldCat Discovery instance.

Edit order items

There are two places to edit information for open and placed order items:
• Order screen
• Order Item Details screen

Edit order items from the Order screen

1. On the left navigation, click Orders > Orders.
2. Click Search to view all orders.
3. Click the Order Name or Order # of the order you want to edit.

Split an order item among multiple funds

Note: Toggling between Amount and Percentage may change the percentage assigned to each fund due to rounding issues when switching between those two modes of assigning costs.

Split an invoice among multiple funds by amount

1. From the Budget/Fund column, click Assign multiple budgets/funds. The Budget and Fund Assignment dialog opens.
   Note: You can also split an order among multiple funds from the Invoices page.
2. For Allocate by, select Amount.
3. Add additional funds by clicking the Add button (➕) and selecting a fund from the Fund drop-down list.
4. Enter the amount for each fund added in the Amount field. The amounts for each fund must add up to the total price of the item. The total price of the item (Amount) and Amount Unassigned can be found near the top of the Budget and Fund Assignment dialog.
5. (Optional) Click Distribute evenly among unallocated funds to distribute any remaining unassigned amount evenly among all funds with zero amount.
6. Click Save.

Split an invoice among multiple funds by percentage

1. From the Budget/Fund column, click Assign multiple budgets/funds. The Budget and Fund Assignment dialog opens.
   Note: You can also split an order among multiple funds from the Invoices page.
2. For Allocate by, select Percentage.
3. Add additional funds by clicking the Add button (➕) and selecting a fund from the Fund drop-down list.
4. Enter the percentage for each fund added in the Percentage field. The percentages must add up to 100.
5. (Optional) Click Distribute evenly among unallocated funds to distribute any remaining unassigned amount evenly among all funds with zero amount.
6. Click Save.
Select funds from different budget periods for an order item

Note:

- Toggling between Amount and Percentage may change the percentage assigned to each fund due to rounding issues when switching between these modes of assigning costs.
- You can always select the current budget period, but the next budget period is only available if you have enabled it for use. To do this, go to the next budget selected and select Enable for Use.

1. From the Budget/Fund column, click Assign multiple budgets/funds. The Budget and Fund Assignment dialog opens.
   Note: You can also split an order among multiple funds from the Order Items page.
2. For Allocate by, select Percentage.
3. Add additional budget periods by clicking the Add button ( ).
4. Select a budget period for each row added from each drop-down list in the Budget column.
5. Click Save.

Edit tax, discount, and service/shipping charges for multiple order items at the same time

1. Click the check box to select the items to which you want to apply discounts, service and shipping charges, and taxes.
2. Select an action from the Update Item(s) drop-down menu.
   - Discount - Enter the discount percentage.
   - Service Charge - Enter the service charge and select one of the following:
     - Apply amount to each selected Item(s). (default)
     - Divide amount among all copies of selected Item(s).
   - Shipping - Enter the shipping charge and select one of the following:
     - Apply amount to each selected Item(s). (default)
     - Divide amount among all copies of selected Item(s).
   - Tax - Enter the tax percentage for Tax 1 and, if applicable, Tax 2.
3. Click Recalculate.
4. Repeat steps 2 and 3 for each additional action you want to take.

Edit order items from the Order Item Details screen

1. On the left navigation, click Orders > Order Items.
2. Click Search to view all orders items.
3. Click the Title/Name of the order item you want to edit.
4. From the Order Item Details screen, edit the order item field(s) you want to update. See a description of the fields below.
5. (Optional) From the Location tab, enter a new quantity for the item.
   Note: The quantity cannot be changed for items that are received, cancelled, or invoiced. If you need to change
the quantity for one of these items, un-receive, un-cancel, or delete the invoice item.

6. (Optional) From the Pricing tab, enter a new value for the pricing field(s). Any encumbrance for this item will be adjusted based on the new price.

7. (Optional) From the Budget/Fund tab, select a new budget period and/or fund. Any encumbrance for the item will be moved to the new Budget/Fund.

8. Click Save.

Editable order item fields - Table

<table>
<thead>
<tr>
<th>ORDER ITEM FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource requires review</td>
<td>Select or deselect the Resource requires review check box.</td>
</tr>
<tr>
<td></td>
<td>Note: • The box will automatically be checked on low-confidence matches when you import MARC order data and select the option to Include low-confidence matches. • For more information on using the Change Resource functionality to select a better record to match the order item, see Change the resource for an order item.</td>
</tr>
<tr>
<td>ISBN/ISSN</td>
<td>Select an ISBN/ISSN from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>Enter the number of volumes that you plan to receive for the item (1-99).</td>
</tr>
<tr>
<td></td>
<td>Note: • The default value for this field is one, and zero is not an allowed value. • To enable this field, contact your Implementation Manager or OCLC Support.</td>
</tr>
<tr>
<td>Statistics Value</td>
<td>Select an acquisition type from the drop-down list.</td>
</tr>
<tr>
<td></td>
<td>Note: • You cannot change an item that has been renewed from a Subscription to a One-Time item. • You cannot change the Acquisition Type to One-Time if the current Processing Type is Monographic Series. In order to change the Acquisition Type, you must first change the Acquisition Type.</td>
</tr>
<tr>
<td>Acquisition Type</td>
<td>Select a processing type from the drop-down list.</td>
</tr>
<tr>
<td>Processing Type</td>
<td></td>
</tr>
</tbody>
</table>
Note:

- If there is shelf-ready data for a Monograph item and the processing type is changed, the shelf-ready data will be deleted.

- Some restrictions apply when changing the Processing Type.
  - Receipt Status must be Not Received or Not Tracked. You can un-receive an item to edit the processing type.
  - If the item has the Acquisition Type of Subscription, the Processing Type can be changed to Monographic Series.
  - If the item has the Processing Type of Monographic Series, it can only be changed if you have not added any volumes to the series.
  - If the item has the Receipt Status of Not Tracked, it can be changed from Serial to E-Product or vice versa, but not to Monograph or Local Resource. You can un-receive the item to change the processing type to Monograph.
  - Local Resource must have the processing type Local Resource.
  - Item selected from the WorldCat knowledge base must have the processing type E-Product. You can use the Change Resource functionality to change the resource of the item to a WorldCat resource and then change the processing type.

### Renewal Setting

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renew</td>
<td>Subscription has been renewed</td>
</tr>
<tr>
<td>Do Not Renew (Canceled)</td>
<td>Subscription has been canceled</td>
</tr>
<tr>
<td>Do Not Renew (Waiting For Review)</td>
<td>Subscription must be reviewed before being</td>
</tr>
<tr>
<td>ORDER ITEM FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| **Requestor**    | Select the person who requested the item from the drop-down list.  

Note: This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field. Auto-suggestions include an email address for the user which is pulled from Delivery Notification of the WorldShare Admin module. If no email exists in the Delivery Notification section, the Library Record email address will be used. |
| **Reviewer**     | Select the person who will review the order item from the drop-down list.  

Note: This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field. Auto-suggestions include an email address for the user which is pulled from Delivery Notification of the WorldShare Admin module. If no email exists in the Delivery Notification section, the Library Record email address will be used. |
| **Vendor Response** | Select a Vendor Response value from the drop-down list.  

Note:  
- You can select one of these values anytime after the order is placed. You can do this based on a vendor e-mail, phone conversation, order response file, etc.  
- The Vendor Response can be set automatically when importing EDIFACT order response files. For more information, see Import EDIFACT order response data. |
| **Requires Attention** | Select or deselect the Requires Attention check box.  

Note: |
<table>
<thead>
<tr>
<th>ORDER ITEM FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>The box can be automatically checked when importing EDIFACT order response files. For more information, see Import EDIFACT order response data.</td>
<td></td>
</tr>
<tr>
<td>It is important to remember to uncheck the Requires Attention box when it is no longer needed. There is no automated process that causes this to happen.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expected Fulfillment Date</th>
<th>Select the options for the expected fulfillment date.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set By - Select the source of the Expected Fulfillment Date. This can be set to:</td>
<td></td>
</tr>
<tr>
<td>◦ Vendor</td>
<td></td>
</tr>
<tr>
<td>◦ System</td>
<td></td>
</tr>
<tr>
<td>◦ Staff</td>
<td></td>
</tr>
<tr>
<td>Expected Fulfillment Date - Enter or choose a date.</td>
<td></td>
</tr>
</tbody>
</table>

Note:

- There is no validation to ensure that the Expected Fulfillment Date is after the date ordered, so be careful when setting this value. It can also be set as far in the future as you wish, so be careful in that respect as well.

Split an order item among multiple funds

Note: Toggling between Amount and Percentage may change the percentage assigned to each fund due to rounding issues when switching between those two modes of assigning costs.

Split an invoice among multiple funds by amount

1. From the Budget/Fund tab, select Amount for Allocate by.
2. Add additional funds by clicking the Add button ( verde) and selecting a fund from the Fund drop-down list.
3. Enter the amount for each fund added in the Amount field. The amounts for each fund must add up to the total price of the item. The total price of the item (Amount) and Amount Unassigned can be found near the top of the Budget and Fund Assignment dialog.
4. (Optional) Click Distribute evenly among unallocated funds to distribute any remaining unassigned amount evenly among all funds with zero amount.
5. Click Save.
Split an invoice among multiple funds by percentage

1. From the Budget/Fund tab, select **Percentage** for Allocate by.
2. Add additional funds by clicking the **Add button ( )** and selecting a **fund** from the Fund drop-down list.
3. Enter the **percentage** for each fund added in the Percentage field. The percentages must add up to 100.
4. **(Optional)** Click **Distribute evenly among unallocated funds** to distribute any remaining unassigned amount evenly among all funds with zero amount.
5. Click **Save**.

Select funds from different budget periods for an order item

**Note:**
- Toggling between Amount and Percentage may change the percentage assigned to each fund due to rounding issues when switching between these two modes of assigning costs.
- You can always select the current budget period, but the next budget period is only available if you have enabled it for use. To do this, go to the next budget selected and select **Enable for Use**.

1. From the Budget/Fund tab, select **Percentage** for Allocate by.
2. Add additional budget periods by clicking the **Add button ( )**.
3. Select a **budget period** for each row added from the Budget column drop-down list.
4. Click **Save**.

Edit tax, discount, and service/shipping charges for a single order item

You can edit the following fields from the Pricing tab:
- **Discount** - Enter the **discount percentage**.
- **Service Charges** - Enter the **service charge**.
- **Shipping** - Enter the **shipping charge**.
- **Tax 1** - Enter the **tax percentage**.
- **Tax 2** - Enter the **tax percentage**.

Click **Save** to save your updates.

Add an order item to a placed order

1. Choose the search Scope to limit your search. See **Basic search**.
2. Select a search Index. See **Basic search**.
3. From the search results, find the item you want to add to the placed order and click **Add to > Order** in the Action column.
4. On the Add Item to Order window, change the settings as needed - Table

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Acquisition Type</strong></td>
<td><strong>One-Time</strong>: A one-time order.</td>
</tr>
<tr>
<td><strong>ISBN/ISSN</strong></td>
<td>The ISBN/ISSN WMS sends to the vendor.</td>
</tr>
<tr>
<td><strong>Processing Type</strong></td>
<td>Select a processing type:</td>
</tr>
<tr>
<td>◦ <strong>Electronic Product</strong> - A nonphysical, electronic title. May be a single item or multi-part item. May be issued in parts indefinitely.</td>
<td></td>
</tr>
<tr>
<td>◦ <strong>Monographic Series</strong> - Monographs released in successive volumes by a single publisher. Each volume in the series has a unique title and ISBN, but all volumes share a common series title.</td>
<td></td>
</tr>
<tr>
<td>◦ <strong>Serial</strong> - Print serials and multi-part monographs where multiple barcodes are applied.</td>
<td></td>
</tr>
<tr>
<td>◦ <strong>Monograph</strong> - Monographs where only one barcode is applied.</td>
<td></td>
</tr>
</tbody>
</table>

5. (Optional) From the Apply Order Template list, click the template you want to apply to the item.  
   Note: If you are not using a template, you will need to assign a fund to the item in order to encumber money on the budget. After adding the item to the placed order:
   1. On the left navigation, click Orders > Orders.  
   2. Click Search to view all orders.  
   3. Click the Order Name or Order # to edit the order.  
   4. Click Assign multiple budgets/funds for the item you added to the order.  
   5. Select a fund from the Fund drop-down list.  
   6. Click Save.  
   7. From the Existing Orders accordion, locate the placed order you want to add the item to and click Add in the Action column. The number in the Items column increases.  
   8. Click Close.

Delete an order item from a placed order

Caution: Deleting an order item from a placed order cannot be undone.

You can delete an order item from a placed order as long as all copies of the item meet the following criteria:

- Receipt Status = Not Received or Not Tracked

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Orders/View_and_edit_an_order_item
Printed: Sat, 31 Dec 2022 19:52:37 GMT
Order Status = Ordered, On Order, Cancelled, or Cancellation Requested
Purchase Status = Not Invoiced
Renewal Status = Not Renewed

Note: If the on-order flag has been set to Yes, then the on-order LHR will also be deleted for these items.

To delete an order item from a placed order:

1. On the left navigation, click Orders > Orders.
2. Click Search to view all orders.
3. (Optional) Select Ordered, On Order, Cancelled, and/or Cancellation Requested from the Order Status filter and then click Apply.
4. Click the Order Name or Order # of the placed order from which you want to delete an order item.
5. Click the check box for the order item that you want to remove and then click Delete Item(s).
6. From the Delete Order Item(s) dialog, click Delete.
   - If the item meets the criteria outlined above, a confirmation message appears and the order item is deleted from the placed order.
   - If the item does not meet the criteria outlined above, one of the following error messages appears:
     - Item has been received, returned, or withdrawn.
     - Item has been invoiced.
     - Item has been renewed.
   - Deleting the order item will cause the item status to be set to withdrawn. For more information, see Withdrawn status.

Order item columns

Order item columns - Table

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget/Fund</td>
<td>The top list is for budgets (if more than one budget is enabled).</td>
</tr>
</tbody>
</table>
The bottom list is for the fund against which the cost of the item will be charged:

**Fund window**

<table>
<thead>
<tr>
<th>LEFT COLUMN</th>
<th>MIDDLE COLUMN</th>
<th>RIGHT COLUMN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund name</td>
<td>Fund code</td>
<td>Parent fund</td>
</tr>
</tbody>
</table>

**Assign multiple funds to an item**

1. In the Fund list, click **Assign multiple funds** (at the bottom of the list window).
2. On the Assign Multiple Funds to Item, select the **Fund**.
3. Enter the **Percentage** of the item's cost the fund will pay. (Make sure the percentages total 100%).
4. Use the **Add** and **Remove** buttons to add and remove funds.
5. Click **Save**.

**Custom Fields**

Click the **Custom Fields button** (📝) to edit the custom fields for the invoice item.

**Discount (%)**

Any discount applied to the item (enter as a percentage).

- Can be edited for multiple items at once.
- See Edit tax, discount, and service and shipping charges for multiple items at the same time, above.

**Display in WorldCat**

Check the box to make items ordered but not received display in WorldCat Local/Discovery, so patrons can place holds on them. Items will only display in WorldCat Local/Discovery after you place an order.

**Note:**

- This option is only available for Purchase Orders.
- This option is not available for items with the
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processing Type</td>
<td>Processing Type of Serial.</td>
</tr>
<tr>
<td>Location</td>
<td>The top list is for branches (if applicable). The bottom list is for shelving locations at the branch.</td>
</tr>
<tr>
<td>Note: On-order LHRs will be updated when the branch and/or shelving location of an unreceived order item is changed if you have enabled the Display in WorldCat checkbox.</td>
<td></td>
</tr>
<tr>
<td>Material Type</td>
<td>The material type of the item represented by an icon. Place the cursor over the icon to see the text definition of the material type.</td>
</tr>
<tr>
<td>Notes</td>
<td>Any notes about the order item.</td>
</tr>
<tr>
<td>Notes (Add Note button)</td>
<td>• Click the Add Note button (add a new note</td>
</tr>
<tr>
<td>Notes (Add/Edit Note button)</td>
<td>• Click the Add/Edit Note button (add or edit notes.</td>
</tr>
<tr>
<td>Quantity</td>
<td>The number of items ordered.</td>
</tr>
<tr>
<td>Service Charges</td>
<td>Any service charges applied to the item. Calculated by multiplying the service change amount by the number in the Qty column.</td>
</tr>
<tr>
<td>Service Charges (Edit tax, discount, and service and shipping charges for multiple items at the same time)</td>
<td>• Can be edited for multiple items at once.</td>
</tr>
<tr>
<td>Shipping</td>
<td>Any shipping charges applied to the item. Calculated by multiplying the shipping amount by the number in the Qty column.</td>
</tr>
<tr>
<td>Shipping (Edit tax, discount, and service and shipping charges for multiple items at the same time)</td>
<td>• Can be edited for multiple items at once.</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Orders/View_and_edit_an_order_item
Printed: Sat, 31 Dec 2022 19:52:37 GMT
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax 1 (%)</td>
<td>A percentage value entered by the user and indicating the tax 1 of the item. This value is multiplied by the price to calculate the tax amount.</td>
</tr>
<tr>
<td></td>
<td>Note:</td>
</tr>
<tr>
<td></td>
<td>• You can assign a percentage value up to three decimal places (e.g., 7.745%).</td>
</tr>
<tr>
<td></td>
<td>• Percentage values with four decimal places will be rounded off to three decimal places (e.g., 7.7454% will be rounded to 7.745%).</td>
</tr>
<tr>
<td></td>
<td>• By default, the percentage value has two decimal places unless a third decimal place is entered.</td>
</tr>
<tr>
<td>Tax 2 (%)</td>
<td>A percentage value entered by the user and indicating the tax 2 of the item. This value is multiplied by the price to calculate the tax amount.</td>
</tr>
<tr>
<td></td>
<td>Note:</td>
</tr>
<tr>
<td></td>
<td>• You can assign a percentage value up to three decimal places (e.g., 7.745%).</td>
</tr>
<tr>
<td></td>
<td>• Percentage values with four decimal places will be rounded off to three decimal places (e.g., 7.7454% will be rounded to 7.745%).</td>
</tr>
<tr>
<td></td>
<td>• By default, the percentage value has two decimal places unless a third decimal place is entered.</td>
</tr>
<tr>
<td>Tax Amount</td>
<td>Sum of Tax 1 (%) and Tax 2 (%).</td>
</tr>
<tr>
<td>Title (ISBN/ISSN)</td>
<td>The title of the item. To see all of an abbreviated title, place the cursor over the brackets and ellipses [...].</td>
</tr>
<tr>
<td></td>
<td>The total of all prices, service and shipping charges, and taxes less any discounts. The total is updated as you make changes.</td>
</tr>
<tr>
<td></td>
<td>• Can be edited by clicking on the <strong>total</strong>. In the Update Total dialog:</td>
</tr>
<tr>
<td></td>
<td>◦ Select <strong>Use New Amount</strong> and enter a new <strong>total amount</strong>.</td>
</tr>
<tr>
<td></td>
<td>◦ Click <strong>Update</strong>.</td>
</tr>
<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>Note: If you changed the vendor's currency, the Grand Total will differ from your library's currency. The difference depends on the exchange rate between the two currencies, which you set when you changed the vendor's currency.</td>
</tr>
<tr>
<td>Unit Price</td>
<td>The price of the item.</td>
</tr>
<tr>
<td>Vendor Item #</td>
<td>A vendor's unique identifier for each line item in an order. Not in use by all vendors.</td>
</tr>
</tbody>
</table>