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:
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.
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>
</table>
| ISBN/ISSN        | Select an ISBN/ISSN from the drop-down list. Enter the number of volumes that you plan to receive for the item (1-99). 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. |
| Statistics Value | Select an **acquisition type** from the drop-down list. 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. |
| Acquisition Type | Select a **processing type** from the drop-down list. 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.

<table>
<thead>
<tr>
<th>ORDER ITEM FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renewal Setting</td>
<td></td>
</tr>
<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 renewed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Renew</td>
<td></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 renewed</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.
<table>
<thead>
<tr>
<th>ORDER ITEM FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewer</td>
<td>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.</td>
</tr>
</tbody>
</table>

**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** (➕) 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.

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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**.
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>One-Time: A one-time order. Subscription: An order for an item that is published in an ongoing manner (no end date), but typically purchased by period. Usually requires renewal by the purchaser at the end of the period.</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: Electronic Product - A nonphysical, electronic title. May be a single item or multi-part item. May be issued in parts indefinitely.</td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monographic Series</td>
<td>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>
</tr>
<tr>
<td>Serial</td>
<td>Print serials and multi-part monographs where multiple barcodes are applied.</td>
</tr>
<tr>
<td>Monograph</td>
<td>Monographs where only one barcode is applied.</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**.

6. 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.

7. 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
- Order Status = Ordered, On Order, Cancelled, or CancellationRequested
- 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 CancellationRequested 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.

### Order item columns

**Order item columns - Table**

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

#### Budget/Fund

**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

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<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>custom fields for the invoice item.</td>
</tr>
</tbody>
</table>
| 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 Processing Type of Serial. |
| Location              | The top list is for branches (if applicable).  
The bottom list is for shelving locations at the branch.                                                                                                                                                  |
| Material Type         | 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.                                                                      |
| (between Title and Fund) |                                                                                                                                                                                                           |
| Notes                 | Any notes about the order item.  
• Click the Add Note button (.addProperty) to add a new note  
• Click the Add/Edit Note button (editNoteProperties) to add or edit notes.                                                                                                                                |
| Quantity              | The number of items ordered.                                                                                                                                                                               |
| Service Charges       | Any service charges applied to the item. Calculated by multiplying the service change amount by the number in the Qty column.  
• 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.                                                   |
<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>charges for multiple items at the same time, above.</td>
<td></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>• Can be edited for multiple items at once.</td>
<td></td>
</tr>
<tr>
<td>• See Edit tax, discount, and service and shipping charges for multiple items at the same time, above.</td>
<td></td>
</tr>
<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>Note:</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>Note:</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>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</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>Total</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 total. In the Update Total dialog:</td>
</tr>
<tr>
<td></td>
<td>◦ Select <strong>Use New Amount</strong> and enter a new total amount.</td>
</tr>
<tr>
<td></td>
<td>◦ Click <strong>Update</strong>.</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>