WorldShare Acquisitions release notes, April 2019

Last updated: Tue, 16 Apr 2019 14:01:50 GMT

Release Date: April 18, 2019

Introduction

This release of WorldShare Acquisitions provides 6 new features or enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Editing of placed orders
- Auto-filling exchange rate on orders and invoices
- Changing the Acquisitions Type and Processing Type when changing the resource for an item
- Including other ISBNs when ordering an e-resource item
- Displaying barcode when showing a list of users
- Showing inactive local resources only if no other results display
- Setting analytics field ID when creating custom fields

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>
</tr>
</thead>
<tbody>
<tr>
<td>Decide which staff should have the ability to edit placed orders. Currently, these users need to have the Acquisitions Senior Staff role or higher in order to edit placed orders. In early May, we plan to introduce a new role called Acquisitions Senior Order Staff role that will have the ability to edit placed orders but will not be able to do receiving or invoicing. You may consider switching users to this new role when it is introduced.</td>
</tr>
</tbody>
</table>
Follow-up actions

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

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review current ordering procedures to see how editing of placed orders may impact your workflows.</td>
</tr>
</tbody>
</table>

New features and enhancements

Editing of placed orders

You now can edit placed orders. Among other things, this will allow you to:

- Fix mistakes made when creating the order
- Adjust the Processing Type for items that are discovered to be a different type upon receipt
- Move an order to a new vendor
- Delete canceled items that you no longer want be stored in Acquisitions

Previously, you could edit certain fields on a placed order (e.g. branch and shelving location) but some fields were not editable. It was also not possible delete a placed order or to add or delete items from a placed order. Now, it is possible to complete all these actions.

Editing fields on the order

You now have the ability to edit all fields on the order. This includes the following newly editable fields:

- Vendor
- Tax Handling
- Currency
- Exchange Rate (if applicable)
- Shipping Type
- Shipping Address

To edit these additional fields:

1. Open a placed order.
2. Edit the desired field(s).

3. To edit vendor, click in the Vendor field, type a new vendor name, and select it from the drop-down list.

   **Vendor**

   ![Vendor Drop-Down List]

   Note: If the vendor has a different currency than the one already selected, a dialog will appear asking if you wish to change the currency of the order.
4. To edit the Tax Handling, simply select a new Tax Handling option from the list. This will immediately trigger a save of the order and recalculate the tax for all items on the order. For this reason, the time for this update will depend on the number of items.

5. To edit the Currency, simply select a new currency option from the list. This will not automatically change the Exchange Rate, so make sure to change this value too, if needed. You can update the Exchange Rate manually or use the new Use Current Rate button to automatically apply an Exchange Rate. See feature description below.

6. To edit the Exchange Rate, simply type in a new exchange rate into the box. This change will immediately trigger a save of the order and re-calculate the encumbrance for all items on the order. For this reason, the time for this update will depend on the number of items.

7. To edit the Shipping Type and Shipping Address, simply select a new option from the dropdown for these fields.

Editing fields on the order item

You now can now edit all fields on the order item. This allows you to fix mistakes made when ordering or to adjust data when you realize it is incorrect (e.g. item has wrong processing type).

This feature includes the following newly editable fields:

- Acquisitions Type (with certain restrictions)
- Processing Type (with certain restrictions)
- ISBN/ISSN
- Budget/Fund
- Quantity (with certain restrictions)
- Unit Price
- Discount
- Service Charges
- Shipping
• Tax 1
• Tax 2

Most of these fields can be edited at any time and for any reason. However, for a few fields, there are restrictions on when the field can be edited. See the step-by-step instructions below for details on these restrictions.

Of course, all fields that were currently editable will continue to be editable, including:

• Request information (requestor, etc.)
• Location
• Display in WorldCat
• Notes
• Custom Fields

To edit fields on a placed order, you simply need to change their value just like you do now for an open order:

1. Open the order page for a placed order to edit some of the fields, like ISBN/ISSN, Budget/Fund, Quantity, and the pricing fields.

2. Open the order item details page for a placed order to edit any of the fields on the order item. Click on the title of the item from the order page or the order item search in order to open the order item details page. This includes editing the Acquisitions Type and Processing Type which are not available on the order page.
3. To edit the Acquisitions Type of the item, go to the order item page and select a new Acquisitions Type from the drop-down.
   Note: You cannot change an item that has been renewed from a subscription to a one-time item.

4. To edit the Processing Type of the item, go to the order item page (click on title from order item search or order page). Then select a new Processing Type from the drop-down.
   Note: Some restrictions apply when changing the Processing Type.
   ◦ Receipt Status must be Not Received or Not Tracked. If needed, simply un-receive the item first, and then the Processing Type will become editable.
   ◦ 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. Again, un-receiving the item will allow the Processing Type to be changed to Monograph.
   ◦ Local Resource must have the Processing Type Local Resource.
   ◦ Items selected from the WorldCat knowledge base must have the Processing Type of E-Product. If needed, you can use the Change Resource functionality to change the resource of the item to a WorldCat resource and then change the Processing Type.
   Note: If there is shelf-ready data for a Monograph item and the Processing Type is changed, the shelf-ready data
5. To edit the Budget/Fund of the item, go to the order page or order item page and simply select a new budget period and/or fund. You can switch from using a single fund to multiple funds or from multiple funds to a single fund. You can also select a fund from any currently enabled budget period. Upon saving, any encumbrance for the item will be moved to the new Budget/Fund.

6. To edit the Quantity of the item, go to the order page or order item page (Location tab) and enter a new quantity for the item.
   Note: The quantity cannot be changed for items that are received, canceled, or invoiced. If you need to change the quantity for one of these items, you can always un-receive the item, un-cancel the item, or delete the invoice item.

7. To edit the pricing fields of the item (e.g. Unit Price, Discount, Tax, etc.), go to the order page or order item page and enter a new value for this field. Any encumbrance for this item will be adjusted based on the new price.

Adding items to placed orders

You can now add items to a placed order in case you forgot to add an item to the order before placing.

Note: When renewing items, it is not recommended to add these items to an existing placed order. Instead, please create a new order for these items.

To add an item to a placed order:

1. Search for the item in Discover Items, Discover Collections or Local Resources.
2. Click Add To > Order for this item. The Add to Order dialog will appear.
3. Find the placed order and click Add next to the order.
Previously, only open orders appeared in this dialog. Now all orders (open and placed) appear in this dialog, and you can even filter by Order Status.

**Deleting items from a placed order**

You can now delete items from a placed order, in case an item was added by mistake or if you later canceled the item and do not want to show this item in your item history.

To delete an item from a placed order:

1. Go to the order page for a placed order.
2. Select items from the item table on the order page and click Delete Item(s) from above the table.
3. Confirm deletion of the item from within the subsequent dialog.
Note: There are some restrictions on the items that can be deleted. You cannot delete the following items:

- Items that are received, returned, or withdrawn
- Items that are renewed
- Items that are invoiced

Also note: If the Display in WorldCat flag has been set for an item, the related on-order Local Holding Records will be deleted when the item is deleted.

Deleting a placed order

You can now delete an entire placed order along with all its items at one time. This is useful when you have placed an order by mistake, or when an order is canceled and you want to remove it from your order history.

As part of this feature, the location of the delete option for both open and placed orders has moved. Previously, you would delete an order by going to the order search (Orders > Orders), selecting the related orders, and clicking delete. Now, you must first open the order itself and click delete at the top of the screen. This functionality was moved because deleting multiple placed orders at one time would have resulted in potentially long wait times and so that users did not accidentally delete a large number of placed orders.

To delete a placed order:

1. Go to Orders > Orders.
2. Search for the order you want to delete and click on the order name to open the order.
3. Click on the Delete button at the top of the order page.
4. Confirm deletion of the order.
5. If you cannot delete the order because of some of the items cannot be deleted (see restrictions above for deleting placed order items), then you will be presented with one of two error messages:
   - If there are 5 or fewer items that cannot be deleted, you will see a list of these items in a table along with the reason why they cannot be deleted. This way, you can un-receive the item, un-cancel the item, or delete the related invoice item before deleting the order.
If there are more than 5 items that cannot be deleted, you will see links to each class of items that cannot be deleted. Again, this can be used to locate the items to un-receive, un-cancel, or delete its related invoice item.
Automatically filling exchange rate for orders and invoices

You can now automatically fill the current exchange rate for an order or invoice. This allows you to easily and quickly calculate what needs to be encumbered or expended on your budget when the vendor operates in a currency different than your institution. Previously, you had to look up the exchange rate yourself and enter it on the order or invoice manually. Now, with a single click, you can enter today's exchange rate on the order or invoice.

To auto-fill the exchange rate:

1. Open an order or invoice where the currency is different than your institution currency.
2. Next to the exchange rate input, click the Use Current Rate button.
3. This will automatically input the exchange rate based on today's rate.
Change the Acquisitions Type and Processing Type when changing the resource for an item

You can now choose whether or not to change the Acquisitions Type and Processing Type when changing the resource for an item. This allows you the power to choose these values based on your assessment of the material, rather than using the system defaults. Previously, the system would automatically change the Acquisitions Type and Processing Type of the item if you changed the resource to a resource with a different default Acquisitions Type and/or Processing Type.

To set the Acquisitions Type or Processing Type when changing a resource:

1. Hover over info icon and click Change Resource.
2. After selecting the new resource, you will be asked to both confirm the change of the resource as well as select the preferred Acquisitions Type and Processing Type.
3. Set the correct values for these fields and click Change. This will change the resource and also set the Acquisitions Type and Processing Type to your selected value.

Note: The same restrictions apply for changing Acquisitions Type and Processing Type during the change resource process as when changing these values outside of this process (see Editing order item fields section above). Also note that if you make a mistake and change one of these fields to an incorrect value, you can always change it later from the order item page.

**Including other ISBNs when ordering an eresource item**

You can now select other ISBNs in the WorldCat knowledge base for a title when ordering this title. Among other things, this allows you to communicate to your vendor the correct ISBN for an e-book selected from the WorldCat knowledge base. Previously, only the primary ISBN for the title was listed in the ISSN/ISBN field on the order page. Now, both the primary ISBNs and the Other ISBNs for a WorldCat knowledge base title are listed in the dropdown on the order page.

To select one of these Other ISBNs:

1. Use Discover Collections, as normal, to add a WorldCat knowledge base e-book to an order. Notice the Other ISBNs listed on the details page in Discover Collections.
2. On the order page, select the appropriate ISBN for the item from either set of ISBNs.

Displaying barcode when showing a list of users

You can now see the barcode and email of a user when selecting a user in Acquisitions. This allows you to distinguish between users with the same first and last name. Previously, you could only see the name fields and not the barcode or email of the user. This feature applies to all places where a user can select another user (e.g. Requestor, Reviewer, etc.).

To view the barcode and email for a user you are selecting:

1. Type the user's name into the auto-complete input
2. Options for the user will display along with their barcode and email, allowing you to differentiate between users with the same name.
Showing inactive local resources only if no other results display

When adding local resource invoice items, you will now only see inactive local resources when no other local resources match your query. This prevents you from accidentally selecting local resources that have been de-activated because they are not preferred. For example, you may have two local resources for postage ("Postage" and "Postage Fees"), but you de-activate one of them, so that you can consistently use the other on all new invoice items. Previously, you would still see both the active and inactive local resources when selecting a local resource for an invoice item, potentially confusing users as to which one to pick. Now, the only time the inactive local resource will display is when it is the only matching result.

For example, if "Postage" is the active resource and "Postage fees" the inactive local resource, you could type Postage and only see the active local resource:

However, if you typed "Postage fees" in its entirety, the inactive local resource would be the only matching resource and would thus display with the ability to activate upon selection:
Setting analytics field ID when creating custom fields

You can now set the Analytics Field ID of a custom field when creating the custom field. This allows you to specify where in Analytics this custom field will display. Previously, the Analytics Field ID was automatically set by the system when creating the field. Now, you can set the value upon creating the custom field to whatever you prefer.

To set the Analytics Field ID:

1. Create a custom field (as normal) from the Settings > Custom Field page.
2. In the Analytics Field ID dropdown, select a number.
Bug fixes

Change resource for merged titles

You can now change the resource for titles in WorldCat that have been merged into another record. There was a temporary problem where when you hovered your mouse over the information icon for a merged title it would not display the pop-up or the Change Resource button. Now both are displayed, enabling the user to change the resource for a merged title to a new or existing resource.

Invoice number tooltip links to invoice

You can now link from the invoice number of a copy to its related invoice even when there are three or more invoices for a copy. When you have three or more invoices for a copy, you must hover over an ellipsis ("...") in the Invoice Number column on the Receive and Invoice page to view links to the related invoices. Previously, these links would not open the related invoice. Now, these links successfully open the related invoice, allowing you to view invoices for a copy even when there are three or more invoices for that copy.

Discover items facets display when changing resource

You can now view and use facets when using the discover items search during the change resource process. Previously, facets would not display in the Discover Items tab within the change resource dialog.

Tax amount displays in CSV export

You can now view the Tax Amount field in the CSV export of invoice items on the invoice page. Previously, when exporting invoice items from an invoice as CSV, the Tax Amount field was showing as blank.

EDIFACT invoice-level costs error message does not display

You now do not view the "invoice-level costs error message" when the only costs for an EDIFACT invoice import are line-level costs. Previously, the system would sometimes display an error message stating that the EDIFACT invoice contained both invoice-level and line-item-level costs, even though there were only line-level costs. This error message no longer displays for these invoices.

Important links

Support website(s)

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