WorldShare Acquisitions release notes, August 2019

Last updated: Fri, 17 Dec 2021 20:04:30 GMT

Release Date: August 22, 2019

Introduction

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

- Disencumbering order items by the amount paid on the invoice
- Viewing historical receiving information for a serial when the WorldCat record is merged
- Viewing the record for an order item in Metadata or Discovery
- Entering 3 decimal places for taxes on the order and invoice
- Conducting a phrase search of vendors when selecting a vendor for an order
- Introducing new date and user fields in WorldShare Report Designer (August 28th release)

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.

ACTION

None at this time.
Follow-up actions

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

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**ACTION**

Consider whether your library wants to use the Disencumber by Amount for any items that may be invoiced partially.

If your library does decide to use the Disencumber by Amount feature, you will need to adjust your close budget procedures to make sure to clear the encumbrance for any of these items that have an open encumbrance before closing the budget.

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New features and enhancements

**Disencumbering order items by the amount paid on the invoice**

You can now disencumber order items based on the amount paid on the invoice rather than the percentage invoiced. This will aid in the processing of items that are invoiced multiple times or in multiple parts and where the price of each part is uncertain. In the past, you had only two options when invoicing an item ordered:

- Fully: This is still the default option and disencumbers the order item amount fully upon payment of the invoice.
- By Percentage: This is the previous way of invoicing an item partially and disencumbered items based on the percentage assigned to the invoice item.

Now, there will be a new By Amount option when invoicing that will allow you to invoice items partially (like with the By Percentage option), but instead of disencumbering a given percentage of the order item amount, it will disencumber the amount paid for the order item.

There are a number of steps and functionality related to this feature. These are described below.

**Invoicing an item by amount (the first time)**

To invoice an item by amount:

1. Follow the normal process for adding an item to an invoice:
   - Open the Receive and Invoice screen in the left-hand panel.
   - Select Action: Invoice.
   - Select an invoice or create a new invoice.
   - Click View Items.
   - Search for the item you wish to invoice at the top of the main panel.
   - Click the Add to Invoice button on the right-hand side of the page.
2. You will now see 3 options for invoicing the item:
   - Pay in full. *This is selected by default.*
   - Pay by percentage.
   - Pay by amount.

3. Select pay by amount. The dialog will display the amount currently encumbered for the item as well as a text input to enter the Input Price of the item.

4. (Optional) Enter the unit price of the item being invoiced.

5. Click Add at the bottom of the dialog.
6. Go to the invoice by clicking on the link to the right of the Items Processed in this Session section.

7. The Invoice Percentage column for the item added will show "--" since the item has no invoice item percentage (but is rather disencumbered based on the amount paid on the invoice).

8. (Optional) Click on the gear icon and enable the Disencumbrance Method column, which will show that the item is disencumbered by amount.

9. Pay the invoice.

10. The amount encumbered for the item will be reduced by the amount paid on the invoice, rather than fully or by percentage.

**Invoicing the same item by amount (a second time)**

In order to invoice the same item again by amount:

1. Follow the normal process for adding an item to an invoice, except when searching for the item, set Purchase Status on the Receive and Invoice screen to Partially Paid.
2. Locate the item you previously invoiced.
3. Click Select Action > Add Debit to Invoice.
4. In the resulting dialog, you will again see the amount still encumbered for the item along with a text input for the unit price of the item.

5. Additionally, you will see an option to "Clear encumbrance and mark copies as paid." Checking this option will result in the following 2 actions:
   ◦ Any remaining encumbrance for the order item will be immediately cleared and set to 0.00.
   ◦ Once all invoices are paid for the item, the resulting copies will be marked as Paid (rather than Partially Paid) in the system.

6. You should check this box when you have received the final invoice (or part) for this item. If you do not, then any remaining encumbrance will be moved to the new budget period upon closing the budget. Also, the Purchase Status of the order item copies will remain as Partially Paid rather than fully Paid.
7. If you do not perform this action at the time the last invoice item is received, you will have an opportunity to clear the encumbrance at a later point in time. This is documented below.

**Clearing encumbrance before end of budget period**

In many cases, you will want to clear the encumbrance of an item disencumbered by amount prior to closing the budget. This is because closing the budget moves any remaining encumbrance to the new budget period. If you have invoiced all items to be received for a given order item (or subscription period), you would want to clear the encumbrance, so that the remaining encumbrance is not moved to the next budget period. This would then allow you to renew the order item (if it was a subscription) and encumber the full amount for the next budget period.

Note: If the encumbrance of the item is already 0.00 (because the amount paid exceeds the amount ordered), then the items will not be moved to the next budget period upon closing the previous budget period. Only the following items will be moved to the next budget period:

- Purchase order items with a positive encumbrance
- Order item templates
- Unpaid invoice items
- Plan order items, with the exception of purchase orders, that are not paid

In order to clear the remaining encumbrance of order items disencumbered by amount before closing the budget:

1. Search for all items for which you want to clear the encumbrance. You can do this in two ways:
   - Search only for items with encumbrance greater than 0.00. This would be done if you only care about not moving items to the next budget period and do not mind that the Purchase Status stays as Partially Paid for these items.
     - Go to the order item search under Orders > Order Items in the left-hand menu.
     - Click the Filters button and select the Encumbrance filter and the Disencumbrance Method filter.
     - Once enabled, select from the Encumbrance filter More than 0.00 and the Disencumbrance Method filter "By Amount."
     - This will show all items disencumbered by amount with an encumbrance greater than 0.00.
   - Search for all items disencumbered by amount where the encumbrance has not yet been cleared (even if the encumbrance is 0.00). This would be done if you want all items disencumbered by amount to be marked as fully Paid at the end of the year, regardless of whether there is any remaining encumbrance.
     - Go to the order item search under Orders > Order Items in the left-hand menu.
     - Click the Filters button the Disencumbrance Method filter.
     - Once enabled, select from the Disencumbrance Method filter "By Amount."
     - Also select from the Purchase Status filter "Partially Paid."
     - This will show all items disencumbered by amount where the encumbrance has not been cleared and/or all invoices have not been paid.

2. Click on the Title of the item to go to the order item details page.
3. Click on the Budget/Fund tab.
4. You will see the Disencumbrance Method, current amount encumbered, and a button to clear the encumbrance. Click Clear Encumbrance.
5. Confirm clear encumbrance action.

Note: As mentioned above, clearing the encumbrance will not only reduce any remaining encumbrance for the item to 0.00 but will also mark all copies of the order item as paid once all related invoices are paid.

6. If you clear the encumbrance by mistake, you can also restore the encumbrance once you are done, as long as the related funds are not on a closed budget period.
Viewing historical receiving information for a serial when the WorldCat record is merged

You can now view historical receiving information for a serial title where the WorldCat record was merged into another record. Previously, if a serial record previously used for receiving was merged with another record, then the local holding records would be moved to the new record, but the received issues would not show in serials management (Discover Items > Title > Issues.) Now, you can view this receiving information from serials management, allowing staff to look up historical receiving information not only from the LHR but from within the Issues section as well.

In order to view historical receiving information for a merged WorldCat record:

1. Go to the Issues section as normal when viewing serials management information.
2. Click on the Historical Issues tab on the serials management page.
3. Select the OCLC Number of the record that was merged. (If there is only one merged record with serials information, it will be displayed automatically.)
4. The issue information will display below, including whether your library received the issue or not. Click View Details to view detailed receiving information.
5. The View Details dialog will display showing all copies received for a particular issue.

![View Details dialog](image)

Note: Although receiving information will now be viewable for this issue, you will still need to continue receiving of issues on the new record, including clicking Start Receiving to indicate you are now receiving the new record.

Viewing the record for an order item in Metadata or Discovery

You can now view the WorldCat record for an order item in either Metadata or WorldCat Discovery. Previously, you had to look up the OCLC Number of the order item in these locations in order to view the record in these other environments. Now, by simply hovering over the information icon of an order item, you can view the record in these other applications. This allows you to access the full record in Metadata, including information not available in Acquisitions, as well as preview the record in Discovery.
In order to view the WorldCat record of an order item in Metadata or Discovery:

1. Hover your cursor over the information icon for a WorldCat resource. This icon appears on the following pages:
   ◦ Order item details page (Orders > Order Items > Click on title)
   ◦ Receive and Invoice page (Receive and Invoice > View Items)
2. Two new links will display:
   ◦ View/edit in Metadata - opens the full record in MARC 21 view in Record Manager
   ◦ View in Discovery - opens the record in the WorldCat Discovery instance of that institution

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Entering 3 decimal places for taxes on the order and invoice

You can now enter numbers with up to 3 decimal places for tax rates on both the order and the invoice. Previously, only numbers with up to decimal places. Now, you can go to an extra level of precision with 3 decimal places. This will help libraries whose tax rates go to this level of detail.

Note: So as not to change the workflow for current libraries only using 2 decimal places, the existing user interface will not change. Numbers will still appear with only 2 decimal places by default. However, if you type a number with a 3rd decimal place, it will now accept the number and use it for calculations.

In order to enter up to 3 decimal places on the order or invoice:
1. Open an order or invoice.
2. In the Tax 1 or Tax 2 columns, enter a tax rate with up to 3 decimal places.

![Tax Rate Table]

3. The system will now accept this value and use it for calculating the tax amount.

Note: Rounding still works as expected. If you type more than 3 decimal places, it will round to the nearest decimal place. If you type a 0 as the 3rd decimal place, it will round the value to 2 decimal places.

**Conducting a phrase search of vendors when selecting a vendor for an order**

You can now conduct an exact phrase match search of vendors when selecting a vendor for an order. Previously, this auto-complete search only supported starts-with searching, but now by typing quotes around your search phrase you can conduct an exact phrase match on the vendor name. This is useful in case where the vendor name ends in a word that may match a number of other words in the vendor name. For example, the vendor "Le Jour" matches vendor names with the word Journal in it.

In order to conduct an exact phrase match for a vendor name:

1. Open the new order dialog.
2. In the Vendor input, type your search with quotes around it (e.g. "Le Jour").
3. Matching search results will display below.

**Introducing new date and user fields in WorldShare Report Designer for Acquisitions universe**

If you use WorldShare Report Designer, as of August 28 you will have access to several new date and user fields within the Acquisitions universe. Previously, these fields were not available as part of the Acquisitions universe.

Among other things, with these new fields you now can track information about who completed certain tasks and when. For example, you can see when an invoice was paid and the staff member who marked it as paid. For the list of new fields, consult Report Designer’s release notes or view the list below:

- Copy Created Staff Full Name
- Copy Created Date
- Copy Received Staff Full Name
- Copy Received Date

Bug fixes
Notify vendor checkbox checked when ordering

The notify vendor checkbox is now automatically selected when ordering if you have the specific notification setting for that vendor set to one of the 3 delivery methods: Print, E-mail (HTML), E-mail (EDIFACT). Previously, even if you had one of these options selected in the specific notification settings area of the vendor, the notify vendor checkbox when placing an order would not automatically be selected.

Vendor searches with stopwords now returning results

Vendor searches using stopwords are now showing the proper search results. Previously, if you included a stopword in the search terms (e.g. "from" from Books from Mexico), the stopword would prevent you from seeing any search results. You would then have to just search for Books or Mexico but not the whole name. Now, stopwords should not impact seeing all appropriate search results for a vendor search.

Apostrophes no longer causing problems with vendor searching

Vendor searches using apostrophes in the middle of words no longer cause problems returning search results. Previously, some searches that included apostrophes would not return the proper results. For example, a search for "coup d'oeil" not return the vendor "Éditions Coup d'oeil". Additionally, a search for "invocations d'aigle bleu" would not return the vendor "Invocations d'Aigle bleu." These searches now return the correct results.
Copies received now being exported in Missing Issues CSV download

The copies received for a missing issue is now able to be exported using the CSV download from the Missing Issues page. Previously, this column was blank in the CSV export.

Known issues

No known issues at this time.

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