WorldShare Acquisitions release notes, November 2019

Release Date: November 18, 2019

Introduction

This release of WorldShare Acquisitions provides 1 new feature. This will help you manage more complex workflows, including:

- Support for binding of serial issues

This enhancement is 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>None at this time.</td>
</tr>
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</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.
Review binding procedures for serial issues. Determine if it would be beneficial for your library to change procedures to use new bindery support in WorldShare Acquisitions. If so, assign the appropriate role to users responsible for binding.

If your library plans to use new bindery process, you will likely need to create a shelving location for when issues are at the bindery (if one does not already exist). Additionally, you will need to adjust your OPAC Status Grid to make sure these materials show as unavailable to patrons.

Note! Due to a problem we are investigating, only barcoded issues sent to the bindery will be show as unavailable in WorldCat Discovery. For this reason, if you do not barcode issues, the step above may not be needed at this time.

New features and enhancements

Binding of serial issues

You can now use the serials management module in WorldShare to manage the bindery process for serial issues. This will allow you to save time and effort by avoiding more manual procedures for updating holdings and managing issues sent to the bindery. Bindery support includes the ability to:

1. Group issues received using serials management into a "binding unit."
2. Send the binding unit to the bindery, which will simultaneously update the Temporary Shelving Location of the issue-level holdings.
3. Complete binding of the binding unit, consolidating holdings for the issues into a single volume.

Previously, managing the binding process for serial issues often meant manually updating information about the issue holdings on the Copies screen in Discover Items or in Metadata. In the past, this could include:

- Setting a temporary shelving location for issues. (Alternatively, a library may have used the Circulation module to check out issues to a "Bindery" patron.)
- Deleting issue-level holdings for bound issues.
- Creating a new bound volume holding.

Now, these processes are streamlined — and in many cases, completely automated — giving libraries more control over how issues sent to the bindery or bound are displayed to patrons.

Add issues to binding unit

The first step in managing the binding process for serials is adding received issues to a "binding unit." The binding unit is a container for issues that will be sent to the bindery and later bound.
Note: Before adding issues to a binding unit, you may wish to create a Shelving Location for the bindery location (e.g. At Bindery) for any Branches / Holding Locations where issues belong. Additionally, you will likely want to ensure items at these Shelving Location show as Unavailable in WorldCat Discovery. Instructions on how to do this can be found here. One tip for configuring these shelving locations as Unavailable: if the word "Bindery" always occurs in the Shelving Location(s) used, you can set the Location in the OPAC Status Grid to “Bindery” (with asterisks) to apply this setting to all Shelving Locations containing this word.

To add issues to a binding unit:

1. Click on Acquisitions in the top-menu.
2. Click on Discover Items and search for the serial title you wish to bind.
3. Click on the title of the serial you wish to bind.
4. Click on the Issues link in the top-right of the page (this will be selected automatically if the item is registered has one of the serial-related material types.)
5. Click on the new "Issues to Bind" tab immediately to the right of "Manage Issues").
6. You will see a list of issues that your library has received using serials management. Data displayed about these issues include:
   - Enumeration
   - Chronology
   - Issue Type
   - Branch
   - Shelving Location
   - Call Number
   - Barcode (if applicable)
   - Date Received
     - Note: Not shown by default, must be enabled using the gear icon.
   - Binding Status (e.g. Not Bound, Pending, Sent to Bindery, Bound)
   - Binding Unit (if applicable)

7. You can filter these issues by:

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2019_release...
8. Filtering by Local Holding Record is useful when you have received multiple copies of a serial title at different locations. With this functionality, you can display only those issues that belong to a specific holding record and thus should be bound together.

9. Select the issues you want to add to the binding unit using the checkboxes on the left-side of the table.

10. Click Add to Binding Unit at the top of the page.

   1. Note: You cannot add issues to a binding unit that already belong to another binding unit. You must first remove the issues from their current binding unit before adding them to another binding unit. See instructions below under "Edit or delete binding unit" on removing issues from a binding unit.

   2. Note: You cannot add issues from multiple branches or holding locations to a single binding unit. This is because when a binding unit is sent to the bindery the system assigns a Temporary Shelving Location to the issues. The Temporary Shelving Location of a holding must belong to the same Holding Location or Branch as the issues in order to be assigned.

11. The Add to Binding Unit dialog will open. You will have the option to add to a new or existing binding unit. If this is your first time adding issues to a binding unit, then select New Binding Unit.
12. Enter details about the new Binding Unit. This includes:

- **Bound Volume Details**: Determines the information used for the bound volume holding that is created when you complete binding of the binding unit.
  
  - **Enumeration Levels (1-4)**
    
    - Note: Must have at least one level of enumeration. We are considering adding support of 0 levels of enumeration in the future.
  
  - **Enumeration (e.g. Volume 1)**
    
    - Note: The enumeration of the bound volume does not need to match the enumeration of the issue(s). For example, the bound volume may only indicate the volume number whereas the issue(s) might indicate the issue number(s) as well (i.e. v. 16 vs. v. 16 i. 1-4). It is entirely up to the library which one they want to display to users in WorldCat Discovery.
  
  - **Chronology (e.g. 2019)**
    
    - Note: The chronology of the bound volume does not need to match the chronology of the issue(s). For example, the bound volume may only indicate the year whereas the issue(s) might indicate the season/month/day as well (i.e. 2019 vs. Spring - Winter 2019). It is entirely up to the library which one they want to display to users in WorldCat Discovery.

- **Temporary Location of Items Sent to Bindery**: Determines the Temporary Shelving Location assigned to the issue-level holdings when the binding unit is sent to the bindery. (Note: While the system will apply the Temporary Shelving Location to both barcoded and non-barcoded issues, only barcoded issues will display with the new shelving location in Discovery. We are currently investigating ways of solving this problem or offering augmented support. For now, if you do not barcode your unbound issues, you may consider not using the send to bindery part of the bindery workflow.)
  
  - **Holding Location (or Branch)**: Selected automatically based on the Holding Location of the issues you have selected. As stated above, you must select issues from the same Holding Location to add to a binding unit.
  
  - **Shelving Location**: Used to assign a Temporary Shelving Location to the issues once the binding unit is sent to the bindery.

- **Permanent Location for Bound Volume**
  
  - **Create Holding**: Determines if a new holding is created for the bound volume upon completing binding of the binding unit. If not checked, no bound volume will be created upon binding of the binding unit.
  
  - **Local Holding Record**: Determines the Local Holding Record where the new bound volume holding will be created. This can be different than the Local Holding Record of the issues that have been added to the
binding unit, allowing the library to have bound volumes at a different location than the unbound issues.

- Note: The default Local Holding Record selected is based first on the Local Holding Record of any previous binding units created. (The assumption is that the same Local Holding Record will be used for previous binding units.) If there are no previous binding units, then the Local Holding Record of the first issue selected will be selected by default. In both cases, you can change the Local Holding Record of the bound volume if desired.

- Public Note: Assigns a public note to the bound volume holding. For example, this can be used to indicate any issues missing from the volume.

- Send to Bindery Now flag: You can use this option if you have the issues in hand and plan to immediately send the binding unit and its issues to the bindery. This will set the status of the Binding Unit and its issues to Sent to Bindery and assign a Temporary Shelving Location to the issue-level holdings.
13. Click Add to Binding Unit at bottom of page

14. Issues are now added to binding unit and will have the Binding Status of Pending.

15. If you wish to add more issues to an existing binding unit, select them from the Issues to Bind tab, click Add to Binding Unit, and then select Existing Binding Unit. You will be able to select existing binding units from a dropdown menu.
Edit or delete a binding unit

If you need, you can always edit or delete the binding unit, as long as it has not been sent to the bindery or bound. This allows you to correct mistakes or modify information about the binding unit.

To edit a binding unit:

1. Go the Volume Binding tab.

2. All binding units created for this serial title will display including the following fields:
   - Enumeration
   - Chronology
   - First Issue (in binding unit by Chronology)
   - Last Issue (in binding unit by Chronology)
   - Issues (i.e. number of issues in binding unit)
   - Branch
   - Temporary Shelving Location (to be assigned when binding unit is sent to the bindery)
   - Bound Volume Local Holding Record (to be used when bound volume is created upon completing binding of
3. You can filter binding units to locate the correct one, including by the following fields:
   ◦ Status (Pending, Sent to Bindery, Bound)
   ◦ Bound Volume Local Holding Record

4. Select Edit from the dropdown menu on the far right of the table or click on the enumeration link on the left-side of the table.

5. The Edit Binding Unit dialog appears. From here, you can add details of the binding unit
   ◦ Note: You cannot make changes to the binding unit if the binding unit is bound. You also cannot remove issues or change the Temporary Shelving Location if the binding unit is sent to the bindery. However, if you must edit them, binding units sent to the bindery can be recalled. Instructions on this are below under Send binding unit to the bindery.

6. Editing the binding unit includes the ability to remove issues from the binding unit. To remove issues, go the Issues in Binding Unit section and simply click on the delete icon next to the issue you want to remove from the binding unit.
7. You can also delete the entire binding unit, assuming it has not been sent to bindery or bound. Just select Delete from the Action dropdown in the far-right of the binding unit table.
   - Note: You cannot undo deleting of a binding unit. This action will also remove all issues for a binding unit and return them to the Binding Status of Not Bound.

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**Send binding unit to bindery**

**Note:** Due to a system limitation, currently, only barcoded issues will display in Discovery as belonging to the designated bindery location. We are currently investigating ways of augmenting this workflow to add further support for non-barcoded issues, but for now, if you do not barcode unbound issues, sending binding units to the bindery will only
affect the status of the binding unit but not the display of these issues in Discovery.

Once all relevant issues are added to the binding unit, you are now ready to send this binding unit — and its issues — to the bindery. This action will assign a Temporary Shelving Location to all issue-level holdings for in the binding unit. This step is important to track those issues that will now be at the bindery, rather than in the library. Of course, if you prefer to skip this step and track issues sent to the bindery in some other way, you can do so; in this case, simply skip to the "Complete binding of binding unit" step below.

To send a binding unit and its issues to the bindery:

1. Go to the Volume Binding tab and locate the binding unit you want to send to the bindery
2. You can filter by the Status of the binding unit to show only binding units in the Pending status (i.e. not sent to the bindery or bound)
3. Click on the Action dropdown in the far-right of the binding unit table and select Send to bindery.
4. The Send to Bindery confirmation dialog will appear. Click on send to bindery at bottom right.
5. Sent to Bindery success message will appear. The Temporary Shelving Location for the binding unit will be assigned to all related issue-level holdings.

6. If the issue-level holding cannot be found, the Temporary Shelving Location cannot be assigned to the issue-level holding. In this case, a warning message will display along with a table of the issues for which the Temporary Shelving Location could not be set. Additionally, the reason for why the issue could not be found is provided. However, it should be noted that the action of sending the issues to the bindery has been performed, so it is recommend to take note of these issues and investigate why they could not be found by the system. (Often, it is because they have been deleted or the Local Holding Record to which they belong has been deleted.)
7. If you send a binding unit to the bindery by mistake, or subsequently want to make changes to the binding unit, you can also recall a binding unit from the bindery. To do this, select the Recall from Bindery option from the Action dropdown to the far-right of the binding unit table.

8. Like with sending to the bindery, you will need to confirm this action. It will consequently remove the Temporary Shelving Location from the related issue-level holdings and return the binding unit and its issues to the status Pending.

**Complete binding of binding unit**

Once the issues have returned from the bindery, it is time to complete binding of the binding unit and its issues. With the new binder process, a number of time-intensive steps are saved including deleting all issue-level holdings for the unbound issues as well as creating the issue-level holding for the bound issue. During this step, the system also checks...
to make sure all issues have not been checked-out to patrons.

Note, however: The action of completing binding cannot be undone, as it makes permanent changes to the Local Holding Record. Please make sure all information is correct, and you have the bound volume in hand, before performing this action.

To complete binding of the binding unit and its issues:

1. Go to the Volume Binding tab and locate the binding unit for which you need to complete binding.
2. You can filter binding units to only those Sent to Bindery in order to locate the correct binding unit.

3. Click on Action dropdown in the far-right of the binding unit table and select Complete binding.

4. The Complete Binding confirmation dialog will appear.
5. You will have the option to Use specified barcode or Use the barcode of the first issue for the bound volume.
6. To use a different barcode than any of the issues selected for the bound volume, select Use specified barcode, enter the barcode, and click complete binding.

7. To use no barcode for the bound volume, select Use specified barcode, do NOT enter a barcode, and click complete binding.
8. To use the barcode of the first issue of the binding unit, then select Use barcode of the first issue and click complete binding.

Please note: For all options above, the complete binding action is permanent and cannot be undone. Please make sure you have the volume in hand, all details are correct about the bound volume, and that you are prepared to permanently delete the issue-level holdings for the binding unit. Additionally, the system must check availability and then delete all issues for the binding unit; therefore, binding units with many issues may take a while to process. Please wait for the action to complete if it takes longer than expected.

9. Like with sending issues to the bindery, if the issue-level holding cannot be found, the issues cannot be deleted. In this case, a warning message will display along with a table of the issues which cannot be deleted. Additionally, the reason for why the issue could not be found is provided. However, it should be noted that the action of completing binding has been performed, so it is recommend you take note of these issues and investigate why they could not be found by the system. (Often, it is because they have been deleted or the Local Holding Record to which they belong has been deleted.)
Complete Binding Results

You have completed binding of 3 issues. The issue-level holdings have been deleted, and a new holding for the bound volume has been created.

Some issues could not be found on the local holding record and therefore could not be deleted. Review the local holding record to make sure no issues remain that have been bound.

Results 1 - 1 of 1

<table>
<thead>
<tr>
<th>Enumeration</th>
<th>Chronology</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>v.1 i.2</td>
<td>2019 Summer</td>
<td>Issue no longer exists on Local Holding Record.</td>
</tr>
</tbody>
</table>

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