Introduction

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

- Displaying unbarcoded issues sent to the bindery under their temporary shelving location in Discovery
- Requiring the date paid when paying an invoice
- Link to a label print list when adding item to label list
- Displaying the default return reasons in the language of the user
- Improvements to the Activity and Partner Exchange Service logs
- Improvements to the platform for invoices
- External Order ID not displayed in Add to Order dialog

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>If paying invoices using the platform, decide whether to provide a date paid during the payment process or to simply...</td>
</tr>
</tbody>
</table>
ACTION

have the system apply today’s date as the date paid.

Follow-up actions

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

ACTION

Consider instructing staff that they must enter a date paid for all invoices upon payment. They can use the default date paid, if desired.

New features and enhancements

Displaying unbarcoded issues sent to the bindery under their temporary shelving location in Discovery

After the WorldCat Discovery release on May 28th, unbarcoded issues that have been sent to the bindery will display to patrons under their temporary shelving location in Discovery. This provides patrons with accurate information about where these issues are located while they are being bound. Previously, if you sent unbarcoded issues to the bindery, then the issues would be marked as sent to the bindery in serials issues management; however, in Discovery, they would still show under their permanent shelving location rather than the temporary shelving location assigned during the send to bindery process. This resulted in issues still being displayed to patrons under their original shelving location instead of their temporary one. Now, when unbarcoded issues are sent to the bindery and a temporary shelving location is assigned to them, these issues show up under this temporary shelving location in Discovery.

To learn how to send issues to the bindery, please see Bind serial issues.

Note: There still exists an issue where temporary shelving locations in Discovery do not show as unavailable when designated as such in the OPAC Status Grid. This issue is being investigated, and we hope to have it resolved this
Requiring the date paid when paying an invoice

You now are required to enter the date paid when paying an invoice. This will help you to not accidentally leave the date paid field blank for paid invoices, leading to incomplete data in the system. Previously, a default date paid was displayed when paying an invoice, but you could remove this date paid and pay the invoice with a blank date paid value. This would result in an empty date paid field on the invoice and in the invoice search, which might be confusing in the future when examining this invoice. Now, this field is required when paying the invoice, making the date paid always present on paid invoices.

To fill in this field upon invoice payment:

1. Open an unpaid invoice.
2. Click the Pay button at the top of the screen.
3. The pay dialog will appear with Date Paid at the top of the dialog. The Date Paid field will display today's date by default.
4. If you remove the date paid value and attempt to pay the invoice, you will receive an error indicating the date paid is a required field.
Link to a label print list when adding item to label list

Now, when adding an item in Discover Items to a label print list, you can link directly to the label print list. This saves you time navigating to your labels and searching for the appropriate label print list. Previously, after adding an item to a label print list, you had to open the My Labels section and find the label print list to open and print the list. Now, you can go directly to the label print list after adding the item to it.

To add an item to a label print list and link to it afterward:

1. Go to Discover Items.
2. Find an item with holdings.
3. Click the Title.
4. Click the Copies tab.
5. Click one of the items.
6. Click the Send to Label Print List button at the bottom of the page.
7. In the resulting dialog, select the label print list to which you want to add the item.

![Send Record(s) to Label Print List dialog]

8. Click Send.

9. A confirmation message will appear with a link to your label print list.
10. This will take you to the label print list in question for printing.

Displaying the default return reasons in the language of the user

When configuring the custom return reasons, the default system return reasons will now display in the language of the user. This will help non-English-speaking users to read the system default return reasons. Previously, these reasons displayed in English in the form they were displayed in the database. Now, they display in their translated form (e.g., in English, if English is chosen as the language of the user, or in German if the language of the user is German).

To display the system default return reasons:

1. Open the Settings page in the left-hand menu.
2. Open the Return Reasons accordion.
3. Scroll down or go to second page to see the system default return reasons.
4. These will now display in the language of the user.
Improvements to Activity and Partner Exchange Service logs

The Activity logs on the automated jobs page and the Partner Exchange Service logs on the vendor page have undergone usability improvements. This will help you read and interpret these logs in a more efficient way. Previously, some of the columns were displayed in an order that did not reflect user needs. Now, the columns display in an order more appropriate for quick perusal of the logs.

The following changes were made to the logs:

- Severity column was renamed Status and moved from the first column to the next to last column.
- The Status column was renamed Status Message and moved to the last column.
- The Date, Type, Result, and Details columns were moved to the left of the screen.

To view the Activity logs on the automated jobs page:

1. Open an automated job (Automated Jobs > Jobs).
2. Click the Activity Log accordion at the bottom of the page.
3. The columns of the activity log now display in a more usable order.

To view the Partner Exchange Service logs:

1. Open a vendor.
2. Click the Partner Exchange Services accordion in the middle of the page.
3. The columns of the partner exchange service logs now display in a more usable order.
Improvements to the platform for invoices

Two improvements have also been made to the platform API related to invoices:

- The system date paid has been added as a field to the invoice output.
- The user can now supply a date paid when paying an invoice.

You can now view the date that the payment status actually changed for an invoice rather than just the date that the user indicated it was paid. This date is called the System Date Paid. Additionally, when paying an invoice, you can supply a date paid at the time you pay the invoice. Previously, the system would set the Date Paid to today's date automatically when paying the invoice, and you had to edit the paid invoice to modify the date paid. Now, you can supply the date paid at the time you are paying the invoice.

Details about both of these improvements can be found on the OCLC Developer Network.

External Order ID not being displayed in add to order dialog

The External Order ID is no longer being displayed in the add to order dialog. This results in less-cluttered and more usable interface with more room to display more relevant fields. Previously, the External Order ID was being displayed in the Add Item to Order dialog along with Order Name, Order Number, Order Type, Vendor, Status, Items, Total, and the Action column. However, this field did not prove useful to users and took up too much room in the order table in the Add Item to Order dialog. This has been removed to free up space on the page.

Previous Add Item to Order dialog (with External Order ID):

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2020_Rel...
New Add Item to Order dialog (without External Order ID):
Bug fixes

**Special characters not being changed in serial title notes**

Special characters are no longer being modified when a note is entered for a serial title. Previously, if you entered special characters for a note for a serial title (Discover Items > Issues), the system would convert these characters to their escaped HTML equivalents. For example an ampersand (&) would become "&amp;" and a quote mark (") would become "&quot;". This resulted in hard-to-read notes for serials when using special characters. Now, special characters entered in the serial notes field will be saved and presented as entered by the user.

**Update date paid for invoices where invoice date is in the future**

With this release, the date paid will be updated to a valid date for all invoices where the invoice date is after the date paid. With the last release, we set the date paid for all invoices to the date that the invoice status was changed to paid. However, this resulted in a few invoices where the date paid occurred before the invoice date, which is not allowed.
when setting the date paid manually. This was in the case the invoice date was set in the future. For those invoices where the invoice date is after the date paid, we have corrected the date paid assigned by the system and adjusted it to be equal to the invoice date.

**Long vendor names no longer making add button unavailable when adding items to an order**

Long vendor names no longer make the add button on the Add Item to Order screen extend outside the dialog. Previously, if a user selected a vendor for an order with a long name that contained no spaces, the vendor column would take up too much room and would make the add button extend outside the add to order dialog. Now, even if a vendor name is entered with the maximum number of characters, it will be wrapped within the column, so that the add button is still visible within the add to order dialog.

**Mark copies as returned that were returned before new returning options existed**

Now, copies that were returned before the return copy improvements from the last release will be marked as returned on the copies screen. Previously, only copies that were returned after the return copy improvements were marked as returned on the copies screen of the order item. Now, all copies that are in the status of returned have the returned flag set for them in both Acquisitions and Analytics.

**E-tags returned for purchase orders in Platform API JSON response**

E-tag headers are now being returned when retrieving purchase orders via the Platform API using JSON. Previously, E-tag headers were not being returned in the response for this media-type, making updates impossible. The JSON response now includes E-tags allowing updates to be made.

**Date paid now being cleared when invoice is unpaid**

The date paid is now being cleared when the invoice is unpaid. Previously, the date paid was remaining in the system even after the invoice was unpaid. It was not being displayed, but it was still saved in the system. This resulted in not being able to modify the invoice date if it occurred after the previous date paid value. Now, the date paid is being cleared completely when the invoice is unpaid, allowing you to assign any invoice date that you wish to the invoice.

**Invalid branch, shelving location and fund warnings now displayed when importing a MARC order file**

When importing a MARC order file, the resulting email notification now displays a warning when items do not have a valid branch, shelving location, or fund (e.g. a branch, shelving location or fund that does not match an existing one for your institution.) Sometimes, these warnings were not appearing. This could possibly result in you not being aware that the MARC order data did not contain a valid branch, shelving location, or fund code. Now, the appropriate warning displays in the email notification when a branch, shelving location, or fund is invalid.
Total tax value for invoice item in platform now shows the correct value

When retrieving an invoice item via the platform, the total Tax 1 value is now accurate. Previously, this was showing only the total tax 1 value for a quantity of 1, but now, it is showing the total tax value for the entire invoice item.

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