WorldShare Acquisitions Release Notes, July 2020

Release Date: July 9, 2020

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:

- Automated claiming of serial issues
- Notifying staff of invoice exports and payment imports
- Showing issues sent to bindery as unavailable based on OPAC Status Grid
- Editing the external invoice ID on a paid invoice
- Viewing the system invoice number in the invoice search
- Sending serial issue claims without the issues listed in the subject

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>None at this time.</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.

ACTION

Configure automated serial issue claiming jobs in order to no longer claim issues manually but have them claimed automatically.

Add a Notify user to your invoice export automated job, so that you receive email notifications about the invoice export and payment import operations.

New features and enhancements

Automated claiming of serial issues

You now have the ability to configure the automated claiming of serial issues that are missing or late. This will save you time and effort in manually claiming these issues with vendors. Previously, manually claiming issues was the only option when notifying vendors of missing or late issues. However, now, you can enable functionality that will automatically claim serial issues based on saved searches you create.

Claiming of serial issues involves two steps:

1. Creating saved searches for the different sets of issues you wish to automatically claim.
2. Creating automated jobs for each saved search and scheduling it to run at regular intervals.

Both steps are required to automatically claim serial issues. The saved search selects the issues that you want to claim. The automated job is linked to the saved search and claims all the issues within the save search. Because of this, you will almost certainly have to set up multiple saved searches and automated jobs to cover all the different publication frequencies and ways of dividing serial issues that are possible in Acquisitions. One recommended way of doing this is detailed in the instructions below and involves setting up 19 different saved searches and 18 automated jobs. However, you are encouraged to be creative in setting up your saved searches and automated jobs to fit your library's needs. Once the saved searches and automated jobs are configured and running, the library can simply leave the jobs to run according to their schedule, receiving email notifications if there are any problems with the claiming actions.

To automatically claim serial issues using saved searches and automated jobs:

2. You will now need to configure saved searches for each of the automated jobs that you want to enable. Each automated job will claim all the issues in the saved search as scheduled, so you want to configure your saved searches appropriately.
3. One way to configure saved searches is to set them up by publication frequency. This way, you can set a different claim delay for issues of each publication frequency. For example, you might wait seven days past the expected release date before claiming a weekly publication, 30 days for a monthly, etc. It is also recommended to set up separate saved searches for the first time you are claiming an issue versus for later subsequent claims. The instructions below will show you how to take this approach.

4. To set up a saved search by publication frequency, first select a frequency from the publication frequency dropdown on the Missing Issues page. Apply this filter.

5. Then, set the expected release date to "more than" the number of days that you want to wait before claiming issues of this publication frequency. For example, you may only wait a week after the expected release date to claim a weekly publication; however, for a monthly or quarterly publication, you may wait much longer after the expected release date (e.g. 30 days) before claiming the issue.
6. As mentioned above, another filter you will likely want to use when setting up your saved searches is the Claims filter. This is because you likely want to claim serial issues that have been previously claimed separately based on the number of days since the last claimed date rather then the number of days since the expected release date. For this reason, for your first set of saved searches, you may set the number of claims to "From 0 to 0." This will ensure that only issues that have never been claimed show up in the saved search.

7. Once this is done, you will want to save your search. Click the save search button in the top-right of the page.

8. You will then need to name your saved search. It is recommend that you name it something descriptive of what you will be claiming (e.g., Late Weekly Issues - Never Been Claimed). This way you know which saved search to select when configuring your automated jobs.
9. If using this method of setting up saved searches, you will need to repeat the process above for all nine publication frequencies. (Do not be concerned if many of your saved searches have no search results. This is not required to set up an automatic claiming process for them. If the search is empty, then no issues will be claimed.)

10. At the end of the process you should have a list of saved searches that target late issues for each publication frequency that have never been claimed. For example:

<table>
<thead>
<tr>
<th>Name of Saved Search</th>
<th>Publication Frequency</th>
<th>Days from Expected Release Date</th>
<th>Claims</th>
</tr>
</thead>
<tbody>
<tr>
<td>Late Weekly Issues - Never Been Claimed</td>
<td>Weekly</td>
<td>User preference (e.g. 7)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late Bi-Weekly Issues - Never Been Claimed</td>
<td>Bi-Weekly</td>
<td>User preference (e.g. 14)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late Monthly Issues - Never Been Claimed</td>
<td>Monthly</td>
<td>User preference (e.g. 20)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late Bi-Monthly Issues - Never Been Claimed</td>
<td>Bi-Monthly</td>
<td>User preference (e.g. 30)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late Quarterly Issues - Never Been Claimed</td>
<td>Quarterly</td>
<td>User preference (e.g. 40)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late 3/Year Issues - Never Been Claimed</td>
<td>3/Year</td>
<td>User preference (e.g. 50)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late Semi-Annual Issues - Never Been Claimed</td>
<td>Semi-Annual</td>
<td>User preference (e.g. 60)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late Annual Issues - Never Been Claimed</td>
<td>Annual</td>
<td>User preference (e.g. 90)</td>
<td>0 to 0</td>
</tr>
<tr>
<td>Late Biennial Issues - Never Been Claimed</td>
<td>Every 2 Years</td>
<td>User preference (e.g. 90)</td>
<td>0 to 0</td>
</tr>
</tbody>
</table>
11. You will later link an automated job to each of these saved searches.

Note: You can also set up saved searches that are more either more fine-grained or more broad. For example, you could set up a saved search for only weekly issues from a specific vendor using the Vendor filter. This might be done if you want to wait a longer period of time before claiming issues from a specific vendor. You could also combine some of the saved searches above. For example, if your weekly and bi-weekly issues were both going to be claimed 10 days after the expected release date, you could set up one saved search that covers both publication frequencies. You could even set up just a single saved search for all issues regardless of publication frequency if you did not mind all publication frequencies having the same claim delay - or number of days past the expected release date. This would reduce your number of saved searches to just a handful.

12. If you do use the method above for setting up saved searches, you will additionally want to set up saved searches for issues that have been previously claimed. To do this, simply remove the filter for the number of days from the Expected Release Date and replace it with the number of days from the Last Claimed Date.

13. The simplest way to do this is by modifying the existing saved searches that you created above. Go to Serials Issues > Missing Issue Searches. Open the search for one of the publication frequencies you created earlier, such as "Late Weekly Issues - Never Been Claimed."

14. Once open, reset or clear the number of days in the Expected Release Date filter.

15. Then, change the number of claims from 0 to 0 to either:
   - More than 1 - This will set up a saved search that will claim issues indefinitely until you manually stop claiming or the issue is received.
From 1 to [the maximum number of times you want to claim the issue] - This will set up a saved search that will claim issues up to the maximum number of times you have set. Then from there it will stop claiming the issues.

16. Then, open the Last Claimed filter and set the number of days to the number of days you want to wait between claiming issues. For example, if you want to claim weekly issues once every five days until you receive the issue, set the Last Claimed Date to "more than" 5 days. Or, if you want to claim monthly issues every 10 days until you receive the issue, set the Last Claimed Date to "more than" 10 days.

17. After you are done modifying the saved search, save it as a new search by clicking on the down arrow to the right of the save search button and selecting save as.

18. Name the search appropriately (e.g., Late Weekly Issues - Already Claimed).
19. Repeat this process for every publication frequency, if deciding to take this approach.

Note: Do not be concerned if many of your saved searches have no search results. This is not required to set up an automatic claiming process for them. If the search is empty, then no issues will be claimed.)

20. At the end of this process you should have a list of saved searches that target late issues for each publication frequency that have been claimed previously. For example:

<table>
<thead>
<tr>
<th>Name of Saved Search</th>
<th>Publication Frequency</th>
<th>Days since Last Claimed Date</th>
<th>Claims</th>
</tr>
</thead>
</table>
| Late Weekly Issues - Already Been Claimed     | Weekly                | User preference (e.g. 5)     | Either
|                                               |                       |                              | More than 1
|                                               |                       |                              | Or
|                                               |                       |                              | 1 to User Preference (e.g. 7) |
| Late Bi-Weekly Issues - Already Been Claimed  | Bi-Weekly             | User preference (e.g. 7)     | Either
|                                               |                       |                              | More than 1
|                                               |                       |                              | Or
|                                               |                       |                              | 1 to User Preference (e.g. 7) |
| Late Monthly Issues - Already Been Claimed    | Monthly               | User preference (e.g. 10)    | Either
|                                               |                       |                              | More than 1
|                                               |                       |                              | Or
<table>
<thead>
<tr>
<th>Issues Frequency</th>
<th>User Preference</th>
<th>Claim Rule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bi-Monthly</td>
<td>1 to User Preference (e.g. 7)</td>
<td>Either More than 1 Or 1 to User Preference (e.g. 7)</td>
</tr>
<tr>
<td>Quarterly</td>
<td>1 to User Preference (e.g. 7)</td>
<td>Either More than 1 Or 1 to User Preference (e.g. 7)</td>
</tr>
<tr>
<td>3/Year</td>
<td>User preference (e.g. 20)</td>
<td>Either More than 1 Or 1 to User Preference (e.g. 7)</td>
</tr>
<tr>
<td>Semi-Annual</td>
<td>User preference (e.g. 20)</td>
<td>Either More than 1 Or 1 to User Preference (e.g. 7)</td>
</tr>
<tr>
<td>Annual</td>
<td>User preference (e.g. 20)</td>
<td>Either More than 1 Or 1 to User Preference (e.g. 7)</td>
</tr>
<tr>
<td>Every 2 Years</td>
<td>User preference (e.g. 20)</td>
<td>Either More than 1 Or 1 to User Preference (e.g. 7)</td>
</tr>
</tbody>
</table>
21. The final saved search you may want to configure is a saved search for all issues claimed more than your maximum limit. For this you do not necessarily need to filter by publication frequency. Instead, you can set up a single saved search where the number of claims is "more than" the maximum times you want to claim. This saved search is not used for automated claiming but is occasionally reviewed by the user to see if these issues need to be stopped claiming.

22. Once you have configured your saved searches, the next step in the process of automatically claiming serial issues is to set up your automated jobs for each saved search.

23. To do this, go to Automated Jobs > Jobs in the left-hand menu.

24. Click on New Job in the top left above the table.

25. Enter the name of the job and select Serial Issue Claim(s) from the Type drop-down list. You can start by naming the automated jobs after the saved searches you created above.
26. Click Save. This will open the job configuration dialog.

27. In the saved search auto-complete, type the name of the saved search that you want to automatically claim. As you type ahead, the name of the saved search will display.

28. Select the saved search for which you want to claim issue(s).
29. Select the Reply-To contact you want to use when claiming these issues. By default, the first contact in the Registry for your library is selected. However, you may change this contact to any other staff member in WMS by clicking the Change button. You may also select “Do not reply,” which will omit the Reply-To section from the claim message.

30. (Optional) Select any custom claim text you want to use for your claims of these issue(s). This text will display on all claims made with this job. You can set up custom claim text under Settings > Institution Settings in the left-panel.

31. Select the schedule under which you want to send claims to vendors. Options include:
- Inactive - Use when you do not want to yet enable the job.
- Daily - Can then select a time of day.
- Weekly - Can then select a day of the week and time of day.
- Monthly - Can then select a day of the month and time of day.
- Manual only - Use only if you want to run this job manually yourself using the Run button at the top of the page.

32. Lastly, select the Notify user. This is the user you wish to be notified upon running of the automated job. This person will receive an email reporting the number of issues claimed, along with a list of both issues that were successfully claimed as well as any issues that could not be claimed for some reason.

Note: There are two primary reasons an issue from a saved search cannot be automatically claimed by the
system:

1. The issue has no vendor associated with it. Vendors are associated with an issue when a subscription order item exists for the same OCLC Number as the title of the issue. If no order item, and thus vendor, is associated with the issue, the system cannot determine where to send the claim. In the email notification for this automated job, you will see a section with a list of issues labeled “No Vendor.” You must create order items for these titles in order for automatic claiming of issues to take place.

2. The issue has an associated vendor, but the vendor has no contact information or there is no email address for the provided contact. If the vendor associated with the issue has no contact information or no email, there is no way to determine the email address to which to send the claim. These errors are also reported in the email notification for the automated job. You can then add the appropriate contact information for this vendor. (It is also recommended that you set the specific notification settings for claiming in the Specific Notification Settings section of the vendor record under Acquisitions Settings.)

33. Once you are done, save the automated job.

34. Repeat the process of creating automated jobs for all saved searches created above.

35. If using the recommended method above for creating saved searches and automated jobs, you will end this process with:
   - 19 saved searches.
     - Nine for each publication frequency for issues never claimed.
     - Nine for each publication frequency for issues that have been claimed.
     - One for issues past the maximum number of claims.
   - 18 automated jobs - one for each of the first 18 saved searches.

36. Of course, as stated above, there are a myriad of ways of setting up saved searches and automated jobs that may also meet the needs of your libraries. Please feel free to explore these other options, just remember that:
   - All publication frequencies used by your library should be covered by your saved searches.
   - Delay periods (days since Expected Release Date or days since Last Claimed Date) should match your expectations for that issue type and/or publication frequency.
   - It is recommended that you set up a separate saved search for issues that have never been claimed than issues that have been claimed, because the delay for issues that have never been claimed is based on the expected release date, whereas the delay for issues that have been claimed previously is likely be based on the Last Claimed Date.

37. As mentioned previously, you will receive an email notification that details the issues that have been claimed for each job. You can use this to stay up-to-date on the issues being claimed by the system, as well as any problems with claiming (such as a missing vendor or contact information.)

38. You can also look into the Activity Logs for a claiming job. These appear below the job details on the automated jobs page.

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2020_Rel...
Notifying staff of invoice exports and payment imports

You can now have a staff member notified when invoices are exported or payment files are imported. With the April release, Acquisitions introduced a new feature that enabled libraries to set up a job that would automatically export invoices marked as ready to their OCLC File Exchange account. The library could then, if they wanted, also upload a payment import file to their account to transition these invoices to the paid status. (This functionality requires a one-time implementation fee, so it may not be available yet in your instance of WMS.) This feature included extensive logging on the status of the export and the import that you could review when the job ran; however, no email notification was provided for the invoice export or payment import at that time. Now, both email notifications are available for libraries using this service, enabling you to stay up-to-date on the status of invoice exports and payment imports happening on the system. This will save you time and effort perusing the logs and help notify you of any problems with the invoice export or payment import.

To enable email notifications for the invoice export and payment import processes:

1. Go to Automated Jobs > Jobs.
2. Use the Type filter to search and locate your invoice export job.
3. Open the invoice export job.

4. In the Notify field, enter the name of the person you want notified by email of the status of invoice export and payment import jobs. Select that person.

5. Save the job.

6. Now, this person will be notified by email whenever:
   ◦ Ready invoices are exported to your OCLC file exchange account using this job.
   ◦ Payment files are imported from your OCLC file exchange account using this job.

7. It is important to monitor this file, just in case there are any problems with the export or import, so that these problems can be quickly resolved. If the job runs daily, it is encouraged that you check these emails every weekday.

Note: There is a known issue that if a payment import file is in the wrong format or schema, the library will not receive an email notification in this case. We are investigating currently, however, and hope to have resolved in the next release.
Showing issues sent to bindery as unavailable based on OPAC Status Grid

As reported in the previous Acquisitions release notes, WorldCat Discovery released a feature with their May release that now allows unbarcoded issues to show under their appropriate temporary shelving location in Discovery. This allows users to send issues to the bindery and have those issues show up as located at their At Bindery temporary shelving location. With this release, we are providing instructions on how to have these "bindery" temporary shelving location(s) show as unavailable in Discovery. It was thought there could be a technical issue with Discovery preventing this, but it was discovered this was only a configuration issue.

To show your bindery shelving locations and any issues at these locations as unavailable:

1. Configure any Bindery or At Bindery shelving locations you want to use using the Holding Codes Translation Table in Service Configuration. You will likely want to set up a Bindery or At Bindery shelving location for every branches where you hold serial issues.
2. Go to the OPAC Status Grid in Service Configuration.
3. Go to the Serials tab.

4. For OPAC Status, enter an asterisk (*).
   Note: After you save your settings, this will change to Any Status.
5. For Location, enter the keyword that you used in all your shelving locations surrounded by asterisks. For example, if you used Bindery or At Bindery as the name for your shelving location(s), then enter Bindery.
6. For status treatment, select unavailable.
7. Save changes to the page.
8. Now, when sending issues to the bindery, set the temporary shelving location to this "bindery" location, and it will show as unavailable in discovery.
9. Additional notes:
   1. You may want to set up a custom shelving location messages for your "bindery" locations. This can be done on the Holding Codes & Shelving Location Messages page in Service Configuration.
   2. You may also want to review in general your Circulation policies for your "bindery" locations. (For example, you want not want to allow holds or checkouts from these locations.)
10. For instructions on sending issues to the bindery, see Bind serial issues.
Editing the external invoice id on a paid invoice

You can now edit the external invoice ID on a paid invoice. This saves you the time and effort of un-paying this invoice if this field needs to be edited. This field was previously not editable if the invoice was paid. Now, you can edit this field at any time, assuming your user has the proper roles for editing paid invoices.

To edit the external invoice id on a paid invoice:

1. Open the invoice in question by going to Invoices > Invoices and locating the paid invoice.
2. Enter or edit the external invoice id field.

Viewing the system invoice number in the invoice search

You can now view the system invoice number of invoices in the invoice search. This save you time in finding a specific invoice by its system invoice number. This is especially useful when troubleshooting issues with the invoice export and payment import feature, since they use the system invoice number to identify the invoice. Previously, the system invoice number was viewable on the invoice details screen but not from the invoice search. Now, it is available in both locations, based on your library's column configuration.

To view the system invoice number on the invoice search:

1. Go to Invoices > Invoices.
2. Go to the top-right of the invoice table that displays. Click the gear button.
3. Select the System Invoice Number checkbox.
4. The System Invoice Number column will display in the far right of the table, with a link to the invoice in the column.
Sending serial issue claims without the issues listed in the subject

You can now send serial issue claims to vendors without sending all the issues in the subject of the email. This prevents confusion on the vendor as well as unnecessarily long subjects for claim messages. Previously, when sending a claim message for serial issues, all the issues themselves were listed in the subject of the email message. This meant if you claimed 10 issues, all 10 issues would display not only in the body of the email (as expected) but in the subject as well. This resulted in claim messages sometimes with extraordinarily long subject lines. This would become especially problematic with the introduction of automated claiming for serial issues, since in this case hundreds of issues might be claimed in a single email. For this reason, we removed the list of issues from the subject line of the email message, while of course keeping the issue specific information in the body of the message.

Bug fixes

Add to order dialog now always shows add button

You can now always see the add button in the add to order dialog, even when using non-English languages. In some non-English languages, the add button in the add to order dialog was extending off the screen. This was due, in part, to the addition of the External Order ID field to the orders table in the Add to Order dialog. With this release, we have removed the External Order ID column from the dialog and expanded the width of the entire dialog by 100px. Both of these combined should guarantee that the add button always displays for all languages.

E-ISSN selectable from order screen

When selecting an ejournal title from the WorldCat knowledge base, the E-ISSN is now being displayed as a selectable option on the order screen. Previously, this was selectable when adding the item to an order, but not when editing the order. Now, it is viewable and selectable on both pages.

Known issues

Invalid file format does not result in email notification for payment import

If the payment import file provided by the library is in the wrong format or schema, the file cannot be imported. However, no email notification is sent indicating that the payment import file is invalid or has invalid data elements. This is something we are currently investigating and should be fixed in the next release.

Switching between serial issue searches results in claiming of wrong title

If you claim issues from both the Missing Issues page and one of the serial issue saved searches in the same session (notifying the vendor in both cases), then the system will continue to claim the previous issues that you claimed even when you are intending to claim a different set of issues. To reproduce this problem:

1. Open a serial issue saved search or go to Serial Issues > Missing Issues.
2. Claim issue(s) from this saved search or missing issues page and notify the vendor of your claim.

3. Go to the alternate serials issues screen from where you started, e.g.
   - Go to a serial issue saved search if you started by claiming issues on the Missing Issues page
   - Go to the Missing Issues page if you started by claiming issues on a serial issue saved search page

4. Attempt to claim issues from this page, notifying the vendor in the process.

In this case, the system will claim the issues from step 2, instead of claiming the issues from step 4. You must refresh the browser to claim new issues. We are currently investigating this bug and it should be fixed soon.

**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