WorldShare Acquisitions Release Notes, February 25, 2021

Release Date: February 25, 2021

Introduction

This release of WorldShare Acquisitions provides 4 new features and enhancements. These features will help you manage more complex workflows, including:

- Renewing subscriptions in bulk using renewal lists
- Title extends to two lines on order
- Showing the full country name on the order message
- Supporting new matching profiles

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.

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.

ACTION

Update your workflows for renewing subscriptions to use the new bulk renewal feature.

New features and enhancements

Renew subscriptions in bulk using renewal lists

You can now renew multiple pages of subscription items from multiple vendors in bulk using a "renewal list." This will save you time and effort having to renew each vendor and each page of subscription items individually. Previously, you had to renew subscription items for each vendor separately. Furthermore, you could only renew one page of subscriptions at a time. Lastly, you could only renew items using the order price as the basis of the new price. With the new bulk renewal functionality, you can now:

1. Renew subscription items from multiple vendors at one time
2. Renew subscription items on multiple pages at one time
3. Renew subscription items using the payment price as the basis of the new price

Not only this, but we are trying out a new strategy for releasing features with the bulk renewal feature. With this feature, while we will release the core aspects of this functionality with this release, we will release further enhancements to this feature with the next 2 or more releases. These enhancements will expand the scope of the feature and its ability to replace current workflows. You can look forward to these future enhancements being featured in upcoming release notes.

To renew subscription items in bulk:

1. Click on Orders > Subscription Items in the left-panel.
2. Search for the subscription items that you want to renew using the search box and filters at the top of the page.
   ◦ Note: Make sure to enable the Filter Renewal Status and search for only items where Renewal Status equals Not Renewed. Items with Renewal Status Renewed cannot be renewed, because they have already been renewed.
   ◦ Note: You can now include items from multiple vendors in your search. This was not possible with the previous renewal functionality.

3. Click on Send to Renewal List at the top of the screen.
4. Click on All Filtered Order Items (##) within the button.
   - Note: This indicates that you are sending all the order items in your results set (including all pages) to a renewal list for renewal. Previously you had to individually select which item or which page you wanted to renew, but now, you can send all the results in your result set (up to 3,000). Right now, you can only send all results to a renewal list, but in the future, you will be able to also select individual items to send to a renewal list.

5. This will open the Send to Renewal List dialog. From here, you can either select an existing renewal list to which to add your items or create a new renewal list to which to add the items you want to renew. (A renewal list is simply a container in which items that you want to renew are held until the time you want to renew them.)
6. To add items to an existing renewal list:
   1. Search for the renewal list by Renewal List Name, Renewal List Number, or Description.
   2. Check the radio button to the left of the renewal list.
   3. Click Send at the bottom of the dialog.

7. To add items to a new renewal list:
   1. Click New Renewal List at the top of the dialog.

   2. Within the next dialog, enter the new renewal list name and click Create and Send to List.

   3. Whether adding items to an existing or new renewal list, you will:
      1. Receive a brief dialog explaining you need to wait while the items are being added to the renewal list.
         This could take a few minutes, if you are sending hundreds of or thousands of items to the renewal list.
      2. Receive a summary of the items added to the renewal list, including:
         - Item(s) to add
         - Item(s) successfully added
         - Item(s) already in list
         - Item(s) discarded
4. From here, you can either:
   1. Close the dialog and add more items to the renewal list.
   2. Go directly to the Renewal List so that you can finish renewing the items.

5. If you need to find a renewal list to which you added items previously, you can go to Orders > Renewal Lists and search for the renewal list in question by Renewal List Name, Renewal List Number or Description. Once found, you can click on the Renewal List name to go to the renewal list.
6. You cannot delete items that you have added to a renewal list. If you attempt to delete an item that is on a renewal list or to delete an order that contains items on a renewal list, you will receive an error, saying you cannot delete this item until you remove it from the renewal list.

7. You can search for order items based on whether they have been sent to a renewal list using the Sent to Renewal List filter. Simply enable the filter from the Order Items page by clicking on the Filters button and selecting the Sent to Renewal List filter. Once selected, you can search for items based on whether or not they have been added to a renewal list. This may be useful when you need to renew more than 3,000 items. You can first add the first 3,000 items by simply adding these items to a renewal list. Then afterward, you can search for items that have not been added to a renewal list using the Sent to Renewal List filter and add these items to another renewal list.

8. Once you have added all items you want to add to your renewal list and are ready to renew the renewal list, you can complete the renewal from the renewal list page itself. This page has 4 sections:
Top section, including:

- **Renewal List Name**
- **Renewal List Number**
- **Status:** New, Completed, Completed with Issues, In Progress, Modifying Items, Stopped
- **Description:** Full-text description of the renewal list and/or its purpose.

Renewal List Settings accordion: Includes settings for how you want to renew the items on this list. More details below.

- **Fund Mappings:** Includes how the fund(s) for the item(s) being renewed will be mapped to the new items being created. More details below.

- **Order Items Being Renewed:** Lists the items that have been added to the renewal list and are either going to be renewed or have been renewed.

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<tbody>
<tr>
<td><strong>Renewal List</strong></td>
<td><strong>Test Renewal List</strong></td>
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<tr>
<td><strong>Renewal List Number</strong></td>
<td><strong>RENEWAL-2021-4</strong></td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td><strong>New</strong></td>
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<td><strong>Description</strong></td>
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9. (Optional) Add a description for your renewal list.
10. Open the Renewal List Settings accordion. Adjust your renewal list settings:

- **Order Creation:**
  - The only available setting for this release is to create orders based on previous orders. This setting will create orders for the new items by copying the information from the orders that are being renewed. For example, if you were renewing 5 items on 2 orders (2 items on one order, 3 on another), when renewing the items, the system would create two orders with identical information (name, vendor, currency, exchange rate, etc.) as the original orders. It would then split the new items between these two orders in an identical way to the items being renewed (2 items on one order, 3 on another.)
  - In future releases, there will be additional options for order creation, including:
    - Adding all items on the renewal list to a single order.
    - Splitting items on to one order per vendor.

- **Exchange Rate:** If the user checks the checkbox, then the system will automatically enter the current exchange rate for any orders created in a foreign currency. This exchange rate will be generated by the system using the same method used when clicking the Use Current Rate button next to the Exchange Rate field.

- **Source price:**
  - Payment price is the only option for this release. This method will base the price of the new item on the following calculation:
    - **Unit Price:** Sum of all unit prices for all invoices paid for this item divided by the quantity multiplied by the invoice item percentage. (Supplemental, credit, refund items are counted as 0%. Items invoiced by amount are counted once at 100% for the first copy.)
    - **Discount:** Sum of all discount amounts divided by the sum of all unit prices for all invoices.
    - **Shipping:** Sum of all shipping charges from all invoices for this item divided by the quantity multiplied by the invoice item percentage. (Supplemental, credit, refund items are counted as 0%. Items invoiced by amount are counted once at 100% for the first copy.)
    - **Service charges:** Sum of all service charges from all invoices for this item divided by the
quantity multiplied by the invoice item percentage. (Supplemental, credit, refund items are counted as 0%. Items invoiced by amount are counted once at 100% for the first copy.)

- Tax 1: Tax 1 value from earliest invoice item for this item. (Because the earliest item usually has the full tax applied, we chose this item from which to draw the Tax 1 value. The average tax 1 payment amount may not be as accurate in this case.)
- Tax 2: Tax 2 value from earliest invoice item for this item. (Because the earliest item usually has the full tax applied, we chose this item from which to draw the Tax 2 value. The average tax 2 payment amount may not be as accurate in this case.)

- In future releases, the order price will also be an option for source price. This will allow you to use the bulk renewal functionality in the same exact way the current renewal option works.
- There is a known issue (also documented below) with setting the price of monographic series items. These items have their price set to 0.00 right now. In the future, it should set the prices as follows:
  - Unit Price, Service Charges, and Shipping: Sum of all unit prices for all invoices paid for all volumes of this item divided by the quantity multiplied by the invoice item percentage. (Supplemental, credit, refund items are counted as 0%. Items invoiced by amount are counted once at 100%.)
  - Discount: Average value of discount from all volumes of the series.
  - Tax 1, Tax 2: Value from earliest invoice item for this item.

- Percentage Increase: This determines the percentage by which the price for the new items will be increased. This percentage can be any number from 0-100. The percentage increase only applies to the unit price field.

11. Open the Fund Mappings accordion. This accordion allows you to map fund(s) used by the order item(s) being renewed to funds in the next budget period.

- The columns in the table include:
  - Source Budget Period
  - Source Fund
  - Target Budget Period (Not editable right now)
  - Target Fund
To select the target fund, simply type in the box under Target Fund to search and select a fund.

- Note: The default target fund will be the fund with the same fund code as the source fund but in the next budget period.
- Right now, you only have the ability to map funds from their current budget period to the next earliest enabled budget period. In the future, you will be able to manually map specific budget periods to another specific budget period.
- You must have a target fund selected for each source fund in order to renew the renewal list.

12. (Optional) Open the Order Items Being Renewed accordion.

- Here you can review the items that will be renewed when you renew the renewal list. You can filter by Processing Status if you want. This will be important after you renew the renewal list. More on this below.

- If you want to remove items, simply select the checkbox next to the item and click Remove at the top of the page.
13. If you decide you do not want to renew these items after all, you can always delete the entire renewal list by going to the top of the renewal list page and clicking Actions. This will display the Delete Renewal List option. With this option, you can delete the entire renewal list, including all its items.

14. Once you have chosen your renewal list settings, mapped your funds, and verified that you are renewing the correct items, you can actually renew the renewal list. To do this, go up to the top of the renewal list page and select Actions > Renew Order Item(s).

15. Once you click on renew order item(s), the system will start to renew the item(s) on the renewal list. This may take awhile, and the list will be in status "In Progress" while it is being renewed. While it is in this status, you cannot edit the renewal list.

16. Sometimes, the renewal list cannot be renewed. If this happens, the status of the Renewal List will change to Stopped, and an error message will display at the top of the renewal list page. Some of the errors that can result in a renewal list not being renewed include:

   - One of the target budget periods has been closed or disabled for use: In this case, a user has closed or disabled one of the budget periods used as a target budget period on the renewal list. The fund mapping will be automatically adjusted. You will need to review the fund mapping and place the order again.

   - Your fund mapping was updated as part of the pre-renewal verification: In this case, most likely someone updated the fund(s) for an item being renewed after it had been added to a renewal list. When this happens, the system updates the fund mapping, and you will need to review the fund mapping again to make sure all source funds are mapped to the appropriate target funds before renewing.

   - One or more funds in the fund-mapping table do not have target funds: You will need to review the fund-mapping and fill in any missing target funds.

   - Exchange rate is unavailable: Use of the current exchange rate was selected, but for some reason, the current exchange rate was not available.
17. When the system is done renewing the items, the status will change to Completed or Completed with Issues.
   - If the status is completed, that means all items were renewed without any problems.
   - If the status is completed with issues, that means that some items were renewed, but some items were either not renewed or renewed with problems.

18. You can filter the Order Items Being Renewed table by the Processing Status to see which items were renewed and which were not. (In an upcoming release, you will also be able to filter these order items by the specific reason it was not renewed.) For now, you can view the reason it was not renewed in the Status Reason column. Some of the reasons an item cannot be renewed include:
   - Already Renewed: can be fixed next time by restricting search to Renewal Status Not Renewed
   - Not a Subscription: can be fixed next time by restricting search
   - On Open Order(s): order for item must be placed to be renewed
   - No Fund(s) for Order Item: order item must have at least one fund to be renewed
   - Marked as Do Not Renew (Cancelled): Renewal Setting must be set to Renew to be renewed
   - Marked as Do Not Renew (Waiting for Review): Renewal Setting must be set to Renew to be renewed
   - All Copies Cancelled: All copies of the item has been cancelled. Can undo cancellation using the order item search screen, if needed.
   - System Error: Unexpected system error occurred.

19. An item may also be renewed with problems. The only problem that would currently cause an item to be marked with this status is when the currency of the target order is different than the currency of the payment. For example, the order that is being renewed has a currency of USD, but the payment was made in CAD. In this case, the source of the price (the payments made on the invoices) is in a different currency than the order being created, so the price may not be accurate. We still renew these items, but mark them in case you want to review and update the prices accordingly.

20. You can also visit the item that was not renewed by clicking on the Title link in the Order Items Being Renewed table.

21. If an item is not renewed, but you are able to change the item so that it can be renewed (e.g. undo cancellation, change renewal setting, add a fund, place order, change Acquisitions Type, etc.), you will need to add these items that were not renewed to a new renewal list and renew that list in order to renew these items. A renewal list cannot be renewed more than once.

22. Once an item is renewed, you can also view the new order and item that was created. This will appear in the right-hand columns of the Order Items Being Renewed table as links.

23. Lastly, and most importantly, there is one more step that you will need to manually take to complete the renewal process. This is to place the orders that have been created. You do this by clicking on the renewal order name in the Order Items Being Renewed section. Once you open the order, you can place it.

Functionality coming in the next release will allow the system to automatically place the orders for you, so
that you do not have to manually place the orders, but for now, you will need to manually place the orders.

Title extends to two lines on the order

You can now more fully view the title of the item on an order. Previously, only one row of the title displayed on the screen. Now, two rows of the title are displayed before showing an ellipsis.

Showing the full country name on the order message

You can now view the full country name, rather than just the country code, on the vendor messages. Previously, only the country code displayed in the From, To, Shipping Address, and Billing Address fields on the order message and other messages sent to vendors. Now, the full country name is shown as the last line of these address fields.

Supporting new matching profiles

You can now use a new matching profile when importing MARC order data into WMS. This new profile may produce, for some libraries, better quality matches for records without OCLC Numbers. However, because of the risk of this change, we are not releasing to all libraries just yet. Instead, you may request from Customer Support that they change your matching profile to the new profile.

Known Issue

Monographic Series items renewed with price of 0.00

When renewing monographic series items, the price of the new item will be set to 0.00. This will be fixed in an upcoming release to support setting the price based on the sum of the invoice items for all the volumes of the monographic series.

Ellipsis showing to the left of the title on invoice screen

On the invoice screen, the ellipsis that reveals the full title of the invoice item is showing to the left of the invoice item title, rather than the right of the title. This will be fixed in our next release.

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