Introduction

This release of WorldShare Acquisitions provides significant performance improvements to the system. These features will help you more efficiently accomplish your tasks.

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>Review the special instructions related to this release (see below) and please inform your staff of these usage restrictions on July 31st, August 1st, and August 7-8th.</td>
</tr>
<tr>
<td>Note the two known issues with this release and inform staff, if needed.</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.
New features and enhancements

Performance Improvements for WorldShare Acquisitions

You will now see faster response times across all of the WorldShare Acquisitions module. These performance improvements will vary in impact based on the library and the nature of the data, but preliminary testing has indicated performance improvements of 2x to 5x the speed currently. These faster response times are due to the use of a new database software. Unfortunately, other acquisitions-related modules, such as serials management (Serials) and vendor management (Vendors), are not impacted at this time, but they may be switched over to this new technology in the future. Additionally, the Discover Items and Discover Collections menu items will not be impacted, because these do not belong to Acquisitions but are components of WorldCat and Collection Manager respectively.

Because the change was an underlying technology behind the whole Acquisitions system, you should see faster response times on every page within Acquisitions. This includes, but is not limited to:

- Searching local resources
- Searching orders
- Searching order item
- Creating orders
- Editing orders
- Editing order items
- Searching invoices
- Searching invoice items
- Receiving and invoicing items
- Editing invoices
- Viewing budgets

However, you may notice improvements more on some pages than others. This is because the longer a page took to load before, the more potential for time savings there are in the future. In other words, the longer the page took to load previously, the more noticeable the performance improvements now are likely to be. Related to this, pages that were already loading in sub-second times may not appear to improve as much.

Additionally, libraries that are searching across more Acquisitions data (orders, order items, invoices, invoice items, funds) may experience more significant time savings overall. In general, the more data the system has to search across the longer the search times are going to be. Therefore, the more data an institution has the more time savings are possible. However, all institutions should see performance improvements across the system.
Lastly, the more complex a search is the more likely you are to notice improvements. For example, an order item keyword search (which is a "contains" search across many different fields) is a very complex search and often can take a while. Because of this, performance improvements may be more noticeable with these more complex search queries.

**Usage Restrictions**

Because of the significant nature of the change to Acquisitions, we are also issuing special instructions for libraries during the install of this feature. These instructions have been posted to the community center several times, but we are alerting you here to these special instructions as well.

The current release will require users to restrict their usage of the system around the time of the release. This release will occur over the weekend (in order to lessen any inconvenience) and will occur on different dates for users in different regions. (The US, Australia, and New Zealand will be installed on August 1st. Canada will be installed on August 7th. Europe, Asia, and Africa will be installed on August 8th.) Final dates and details about the release are contained in the tables below, but the basic instructions for this release are as follows:

- Starting Saturday morning at midnight until Sunday at Noon (or for Canada, Friday at 11pm to Saturday at Noon): Do NOT place orders on the system. Orders placed during this time will NOT have on-order local holding records created.
- Starting Sunday morning at midnight until Sunday at Noon (or for Canada, Friday at midnight until Saturday at noon): Do not perform any action at all within Acquisitions. While the system will be available during this time, there is a slight possibility that changes saved during this time will be lost.

Unfortunately, we are unable to shut down access to the site entirely during this time due to internal testing needs, so we are relying on you from refraining from all restricted behaviors during the assigned times. As stated above, current dates and times are listed below. If you have any further questions, please contact support.

Here are the exact times for each region:

**United States - New York : Eastern Daylight Time**

<table>
<thead>
<tr>
<th>Start Date/Time</th>
<th>End Date/Time</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 31, 2021 - 0:00 EDT</td>
<td>August 1, 2021 - 12:00 EDT</td>
<td>Do not place orders. (Orders placed will not create corresponding on-order Local Holding Records.)</td>
</tr>
<tr>
<td>August 1, 2021 - 0:00 EDT</td>
<td>August 1, 2021 - 12:00 EDT</td>
<td>Do not perform any action within Acquisitions. (Changes saved during this time could be lost.)</td>
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**Australia and New Zealand - Sydney : Australian Eastern Standard Time**

<table>
<thead>
<tr>
<th>Start Date/Time</th>
<th>End Date/Time</th>
<th>Instructions</th>
</tr>
</thead>
</table>
July 31, 2021 - 0:00 AEST  August 1, 2021 - 12:00 AEST  Do not place orders. (Orders placed will not create corresponding on-order Local Holding Records.)

August 1, 2021 - 0:00 AEST  August 1, 2021 - 12:00 AEST  Do not perform any action within Acquisitions. (Changes saved during this time could be lost.)

Canada - Toronto : Eastern Daylight Time

<table>
<thead>
<tr>
<th>Start Date/Time</th>
<th>End Date/Time</th>
<th>Instructions</th>
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</thead>
<tbody>
<tr>
<td>August 6, 2021 - 23:00 EDT</td>
<td>August 7, 2021 - 12:00 EDT</td>
<td>Do not place orders. (Orders placed will not create corresponding on-order Local Holding Records.)</td>
</tr>
<tr>
<td>August 7, 2021 - 0:00 EDT</td>
<td>August 7, 2021 - 12:00 EDT</td>
<td>Do not perform any action within Acquisitions. (Changes saved during this time could be lost.)</td>
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</tbody>
</table>

Europe, Africa, Asia - Amsterdam : Central European Standard Time

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<thead>
<tr>
<th>Start Date/Time</th>
<th>End Date/Time</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 7, 2021 - 0:00 CEST</td>
<td>August 8, 2021 - 12:00 CEST</td>
<td>Do not place orders. (Orders placed will not create corresponding on-order Local Holding Records.)</td>
</tr>
<tr>
<td>August 8, 2021 - 0:00 CEST</td>
<td>August 8, 2021 - 12:00 CEST</td>
<td>Do not perform any action within Acquisitions. (Changes saved during this time could be lost.)</td>
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We will send additional reminders in the coming weeks, but please inform all appropriate staff of these instructions immediately.

**Known issues**

The significant nature of the changes to Acquisitions has resulted in a few changes to the searching functionality in the system. We hope to fix many of these with the next release, but due to time constraints, a few of these will be experienced in the meantime.

**Some searches are now case sensitive**

Some searches, which were previously not case sensitive, are now case sensitive. For example:
• Local resources search
  ◦ Description
• Order item search
  ◦ Fund code
  ◦ KB collection identifier
• Receive and invoice search
  ◦ Copy number
• Invoice items search
  ◦ Fund code
  ◦ Payment reference ID
  ◦ Invoice item number
  ◦ Order item number

Some of these problems have already been fixed and will be released in late August. A few others are being analyzed now for feasibility.

**Adding local resource items to an invoice is now case sensitive**

When adding a local resource invoice item to an invoice, you must now search for local resources using a case-sensitive auto-complete menu. Previously, when you searched for local resources to add to an invoice, the system would display possible local resources based on a search that was NOT case sensitive (e.g. a search for taxes and TAXES would return the same local resource). Now the system is conducting a case-sensitive search, so that if you search for a version of the local resource with a different case it will not return that local resource in the results of the auto-complete. For example, let's say you try to add a local resource invoice item called "taxes" and there is a local resource called "TAXES", the system will not display to you the uppercase "TAXES" local resource and will instead ask you to create a new local resource called "taxes." After you do, however, the system will detect you are attempting to create an invoice item with a duplicate local resource on the invoice and will display an error saying that the invoice item could not be created. You will need to then add the local resource invoice item again, this time searching for the word(s) with the correct case. This problem is already fixed and will be released in late August.

**Support website(s)**

Support information for this product and related products can be found at:

• [WorldShare Acquisitions](https://help.oclc.org/Library_Management/WorldShare_Acquisitions)
• [Contact OCLC Support](https://help.oclc.org/Library_Management/Contact_OCLC)
• [OCLC Community Center](https://help.oclc.org/Library_Management/Community_Center)
• [Browser compatibility chart](https://help.oclc.org/Library_Management/Browser_compatibility_chart)