WorldShare Acquisitions Release Notes, March 2022

Release Date: March 24, 2022

Introduction

This release of WorldShare Acquisitions provides one new feature in addition to numerous bug fixes. This feature will help you manage more complex workflows, including:

- Expanding the number of Acquisitions roles

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.
Consider using one of the new Acquisitions roles in your library.

New features and enhancements

Support for new Acquisitions roles

You can now assign new Acquisitions roles to users in your library. This will allow you to manage your users' permissions in a more granular and flexible way, optimizing existing workflows and allowing for new workflows and partitioning of duties.

These new roles include the following:

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Definition</th>
<th>Possible Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisitions Cataloging Staff</td>
<td>User can search for order items and change the resource for these order items.</td>
<td>This role could be given to cataloging staff so that they could review the resource associated with certain order items and change the resource if not accurate or if a better record is available.</td>
</tr>
<tr>
<td>Acquisitions Budget Manager</td>
<td>User can complete all actions regarding the management of budgets and funds.</td>
<td>This role could be given to staff responsible for managing the library budget, but who is not responsible for ordering or receiving items.</td>
</tr>
<tr>
<td>Acquisitions Budget Staff</td>
<td>User can complete all actions regarding the management of budgets and funds, except for closing a budget.</td>
<td>This role could be given to staff responsible for creating new budgets and modifying existing budgets (e.g. updating fund codes, budgeted amounts, etc.) but who would not have the authority to close the current budget.</td>
</tr>
<tr>
<td>Acquisitions Settings Staff</td>
<td>User can complete all actions under &quot;Settings&quot; in Acquisitions, except modifying exchange rates.</td>
<td>This role could be given to staff responsible for configuring their instance of Acquisitions but not responsible for the day-to-day ordering, invoicing, or receiving activities of the library.</td>
</tr>
<tr>
<td>Acquisitions Exchange Rates Manager</td>
<td>User can view and manage the</td>
<td>This role could be given to staff responsible for updating the</td>
</tr>
</tbody>
</table>
Please consider assigning these new roles to your staff.

**Bug fixes**

**Updating multiple items on an invoice**

You can now update multiple items on an invoice using the "Update Item(s)" button above the table of items. Previously, this functionality was not working correctly, and when you tried to update multiple item(s) (e.g. discount, taxes, service charges, shipping), the screen would freeze and the update would be lost. Now, the update performs as expected. However, there is still a remaining issue where after the update occurs, the screen refreshes and only 5-6 items are displayed on the screen even if the number of rows was set to a larger number. If you refresh the table afterward, the appropriate items will display, and you will see that the update was performed as expected. We have noted this latter problem as a known issue, and it will be fixed with the next release.

**Place patron hold saves consistently**

You can now set the "place patron hold" flag for an order item consistently without it later reverting to not being checked. Previously, sometimes when you updated an order item with the "place patron hold" flag set to yes, it would uncheck this setting for you and save the item without this setting enabled. This resulted in holds not being placed on items that they should have been placed on. This bug has been fixed, and now, if you check the "place patron hold" flag, it will consistently keep this setting across multiple changes to the order item.

**Custom fields displaying for order items**

You can now view your custom fields on the order item details page. Previously, you could view custom fields for an order item by clicking on the Custom Fields column on the order page, but you could not view the custom fields in the Custom Fields tab on the order item details page (Orders > Order Items > Click on title). Now, you can view the custom fields on the order item details page.

**Report for shelf-ready import is accurate**

You can now see accurate information regarding the number of copies imported via the shelf-ready data import. Previously, if you had any problems importing any copies in the shelf-ready data import, it would not report these in the summary of copies imported. For example, instead of saying 65 of 67 imported, it would say 65 of 65 imported. This is inaccurate. Now, the correct summary data is reported in the e-mail notification and logs when
importing shelf-ready data.

**Known issues**

**Updating multiple items on an invoice**

When you update multiple items on an invoice (e.g. discount, service charges, shipping, or taxes), after updating the items, the table will only display 5-6 items even though you have configured more rows to display. The update should have been performed, however, and to return to the default view you simply need to click the refresh icon on the invoice items table. This bug will be fixed with the next release.

**New role not working as expected**

The new Acquisitions Exchange Rates Manager role is not currently working as expected. Instead of giving the user access to Settings > Exchange Rates, the whole Settings accordion is not displayed. This will be fixed in the next release, if not sooner.

**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