Introduction

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

• Sending serial issue claims via EDIFACT
• Boosting relevance of matched items based on number of holdings

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.

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<th>ACTION</th>
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<td>None at this time.</td>
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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

Explore whether you want to send serial issue claims to your vendor via EDIFACT messages.

New features and enhancements

Send serial issue claims via EDIFACT

You can now send serial issue claims via an EDIFACT message. This speeds up the time it takes your serials vendor to process your claims, making the process more seamless for your library. Previously, you could send serial issue claims via e-mail in an HTML format or by printing the claim and sending it via the postal mail. Now you can send serial issue claims in the EDIFACT electronic data interchange (EDI) format via both e-mail and FTP.

To send serial issue claims via EDIFACT:

1. First you should configure your EDIFACT settings for your serials vendor. This can be done from the Acquisitions Settings of the vendor page.
2. You will need to enter the following information in the EDIFACT settings:
   - UNB Vendor Identifier
   - UNB Library Identifier
   - NAD Vendor Identifier
   - NAD Library Identifier
3. This information can be obtained from your serials vendor. Some configurations may require you to enter data in the Registry for your institution (e.g. GLN, SAN, etc.) or in the identifiers section of the vendor page itself.
4. If you plan on sending the EDIFACT message via FTP, you will need to configure a secure FTP login (SFTP or FTPS) to the serials vendor’s FTP server in the Links and Logins section of the vendor page.
5. You also may want to establish your specific notification settings for serial issue claiming. To do this, go to the Acquisitions Settings of the vendor page and select a delivery method of FTP (EDIFACT) or e-mail (EDIFACT) and either a FTP Profile or vendor contact for the action "Claiming Serial Issues". (If you do not use the Action "Claiming serial issues" the default claiming settings for serial issue claiming will fall back to the specific notification settings for the "Claiming" action, but using the specific "Claiming serial issues" action is recommended.)
6. Once these 2 configuration steps are completed, you can search your missing serial issues by going to Acquisitions > Serial Issues > Missing Issues.
7. Once you have found the issues you want to claim, select them using the checkboxes on the left-hand side of the table.
8. Click Claim at the top of the page.
9. Select "Notify vendor" if it is not already selected, then click Continue in the dialog.
10. On the "Notify vendor about this claim" dialog, confirm the Delivery Method and FTP profile or Vendor Contact are correct, and then click Send Claim.
11. The system will immediately attempt to claim these issues. Wait for a confirmation before leaving the screen. If sending fails, change your configuration and claim the issues again.
Boost relevance of matched items based on number of holdings

When running our secondary matching algorithm on MARC order import data, the system will now boost the relevance of matched items based on the number of holdings they have as long as the MARC record contains a standard identifier. This saves the library time by making it unnecessary for libraries to manually change the resource of items to the bibliographic record with the most holdings. Previously, when matching MARC order data to WorldCat records, our primary matching service took the number of holdings on the records into account, but the secondary matching process that is invoked when no match is found and "include low confidence matches" is selected by the user did not take into account the number of holdings for candidate records. Now it does, preferring the record with the most holdings when matching when searching by a standard identifier like ISBN.

To use this new boost:

1. Import your MARC order data file like normal, from the Vendor page (under Partner Exchange Services)
2. Select Type "Import order data".
3. Select option "Include low-confidence matches".
4. If a MARC record fails to find a match from the primary matching algorithm, a secondary matching algorithm kicks in and uses number of holdings to pick the best candidate record when searching by a standard identifier.

Bug fixes

Export of invoice items on invoice now working

You can now export invoice items on an invoice as CSV. This was not working after the last release. You could not use the export icon on the table of invoice items on an invoice. Now you can and it works as expected to provide a CSV download of the invoice item data.

More than filters no longer includes the defined value

Filters in Acquisitions where you specified that the value of the filter was "more than" a specific number now do not include the specified value in the query. For example, if you had previously specified that an Encumbrance of an order item was "more than" 0.00, the results would contain results that were equal to 0.00. This made the more than filter function like a "more than or equal to" filter, which was confusing to users. The workaround was to enter a value .01 greater than the value desired, e.g. more than .01, but many users did not know to do this. Now, the more than filters in Acquisitions, such as Encumbrance, Invoice Quantity, etc. do not include the specified value in the search results.

Umlauts now displayed correctly in Partner Exchange Service logs

Umlauts and other characters were being displayed in their "Escaped HTML" form in some of the Partner Exchange Service logs in Vendor Management. Now, these umlauts and other non-English characters display correctly, without being escaped.
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