WorldShare Acquisitions release notes, March 2018

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Release Date: March 22, 2018

Introduction

This release of WorldShare Acquisitions provides 3 new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

- Changing the resource/title for electronic products
- Entering the arrival date for items, in addition to receipt date
- Improving the usability of certain pages

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.
You may want to change your documentation to reflect the fact that you can now correct the resource or title of an electronic product that you have previously ordered. In the past, you could only change the resource for titles selected from WorldCat (Discover Items). Now if you accidentally select the wrong resource for an electronic product, you can correct this mistake by selecting a new resource from the WorldCat knowledge base.

You may want to change your documentation to allow users to enter the Date Arrived for items before you receive them. This is a new feature and may be useful for some reports and workflows.

New features and enhancements

Change resource for e-products

You can now change the resource (or title) of an order item from one e-product selected in the WorldCat knowledge base to another e-product in the WorldCat knowledge base. You can even select a WorldCat record, or switch from a WorldCat record to a WorldCat knowledge base record. This provides a number of benefits, including:

- Being able to correct yourself if you have selected the incorrect WorldCat knowledge base record
- Being able to renew an item and change the knowledge base record afterward, in the case that it changed publisher or package

Previously, you could change the resource or title for order items selected from WorldCat (Discover Items) but not from the WorldCat knowledge base (Discover Collections). Now, you can change the resource for either type of resource. You can also switch between these resource types, automatically adjusting the Processing Type and Acquisitions Type in the process.

To change the resource for an order item, you will need to:

1. Hover your cursor over the information icon (i) that appears on the following screens:
   - Order details screen (Click on Orders > Name of Order > Icon appears to left of title)
   - Order Item details screen (Click on Orders > Order Item > Title of Item > Icon appears at top left of General tab)
   - Receive and Invoice screen (Click on Receive and Invoice > Outstanding Items > Icon appear to left of title)
2. The information icon pop-up will appear:
Note: The content of the information pop-up depends on whether the resource is a WorldCat knowledge base collection, title, or a WorldCat title.

3. Click the Change Resource button at the bottom of the pop-up.
4. A new dialog will appear with two tabs: Discover Items and Discover Collections.
Note: By default, you will be taken to the screen where you originally selected your resource with a search by the title of the resource automatically entered.

5. To select another WorldCat knowledge base resource, use Discover Collections and the search options found underneath this tab. To select a WorldCat resource, use the Discover Items tab.

6. When you have found the title or collection you want to select as your new resource, click on the Title of the resource in the Discover Collections or Discover Items window.
7. You will then be presented with a confirmation screen, asking you to confirm your choice of new resource.

8. Your screen will refresh and the new resource name will appear on the screen.

**Enter Date Arrived before Date Received**

You can now enter the Date Arrived for a copy of an item before receiving the item. This will allow you to track when the item physically arrived in your library as opposed to when you added the item to your collection. This feature will appear in the Acquisitions universe in Report Designer and will allow you do things like:

- Track the amount of time between when an item arrives at your library and when it is added to your collection
- Find the original Date Arrived for an item or items upon request by patron or staff requestor

Previously, you could track the Date Received of an item. The system automatically set the Date Received when an item was received either from the Receive and Invoice screen or by marking it as received in the order item search. However, you could not track the date the item arrived in your library. Now, you can track both.
To enter or modify the Date Arrived for an item, you will need to:

1. If you want to make sure your staff do this for all monograph items, contact OCLC Support to have the Acquisitions setting turned on that will show the Date Arrived screen every time a monograph item is received. This will appear immediately after the barcode is entered on the Receive and Invoice screen if configured in this way. Note: Only some libraries will want to make this feature mandatory by doing this.

2. Click Receive and Invoice > Outstanding Items.

3. Show the Date Arrived column using the gear icon on the top-right of the screen.

4. For Monographs, receive the item as you normally would using the Barcode and Call Number fields.
5. Once received, you will either be presented automatically with a dialog to enter the Date Arrived (if so configured in step 1 above) or you will need to click on the Set Date link in the Date Arrived column in the Items Processed in this Session section at the bottom of the page.

6. For Serials and E-Products, you can actually enter the Date Arrived by simply clicking on the Set Date link in the Date Arrived column on the page.

7. In all of the cases above, you will be presented with a dialog where you can enter the Date Arrived for the item.
Note: You can enter the Date Arrived manually or using the calendar widget accessible via the calendar icon.

8. The Set Date link will be replaced with the Date Arrived that you entered as a link.

9. To edit the Date Arrived at a later point, click on the link to open the Date Arrived dialog again.

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Improved usability of searching

You can now more easily search data objects in Acquisitions because the cursor focus automatically appears in the search box when opening a search page. This saves the user the time of clicking in the search box after clicking on a search page. Previously, you had to first click on the search page itself and then put your cursor in the search box. Now,
your cursor is placed into the search box automatically. This works for the following pages:

- Orders
- Order Items
  - One-Time Items
  - Subscription Items
  - Missing Order Items
- Missing Issues
- Invoices
- Bibliographic Invoice Items
- Non-Bibliographic Invoice Items
- Vendors
- All Saved Search pages

**Improved usability when creating and editing objects**

You can now more easily create and edit data objects in Acquisitions because the cursor focus automatically appears in the first input when creating or editing a data objects. This saves the user the time of clicking into the first input after clicking to create an object or open an object for editing. Previously, you had to first click on the page itself and then put your cursor in the first input on the page. Now, your cursor is placed into the first input automatically. This works for the following pages:

- New Order dialog
- Order details page
- Order Item details page
- Invoice details page
- New Job dialog

**Bug fixes**

**Sorting for items on invoice page now working**

Sorting of invoice items on the invoice page is now working for all columns. Previously, it was not working for any columns. Only the default sort order would display. Sorting by any other column would not sort the items properly. Now, the user can sort by all valid columns in the invoice item table on the invoice page.

**Exact amounts are used when invoicing order item with split funds**

When invoicing at 100% all copies of an item, the same exact amounts of the fund-splitting are used on the invoice as on the order. Previously, the amounts of the fund-splitting on the invoice were calculated using proportions or percentages, but now the exact amounts specified on the order for the invoice are used - at least in the case when all

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2018_rele...
copies of an invoice are being invoiced at 100%. In other cases, this might not apply. This will allow libraries to specify the exact amount to be allocated to a fund on the order item and have that be adopted exactly on the invoice item in most cases.

**Notes in EDIFACT order message do not include HTML-encoding**

The notes in the EDIFACT order message no longer include HTML-encoding. Previously, special characters (like brackets, slashes, etc.) were encoded using HTML-encoding rules in the EDIFACT order message. This is no longer the case.

**Cutter no longer copied into the Classification field on Receive and Invoice**

The cutter for the call number is no longer copied into the Classification field if an alternate Classification is selected on the Receive and Invoice screen. Previously, if you selected the 2nd Classification value from the dropdown, it would replace the Classification value with the Cutter value. Now, it properly inserts the Classification value selected from the dropdown into the Classification field.

**Date Paid on invoice page matches invoice search page**

The Date Paid displayed on the invoice page now always matches the Date Paid on the invoice search page. Previously, these could be different for a select number of invoices, based on time-zone differences. This is no longer the case, and these dates should always match now.

**Buttons on top of all pages are anchored to top of page**

The buttons on top of the Invoices search page and Missing Issues search page are now anchored to the top of the page. This means when scrolling down the page they remain viewable at the top of the screen. Previously, this was the case for all other pages with buttons on the top of the page, except for these two pages. Now, it applies to all pages.

**Important links**

**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/Release_notes_and_known_issues/2018_release)
- [OCLC Community Center](https://community.oclc.org)
- [Browser compatibility chart](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Release_notes_and_known_issues/2018_release)