Change the resource for an order item

Last updated: Tue, 27 Apr 2021 20:20:12 GMT

Discover how to change the resource (or title) of an order item from one e-product selected in the WorldCat knowledge base to another, select a WorldCat record, or switch from a WorldCat record to a WorldCat knowledge base record in WorldShare Acquisitions.

You can change the resource (or title) of an order item from one e-product selected in the WorldCat knowledge base to another, select a WorldCat record, or switch from a WorldCat record to a WorldCat knowledge base record from the following screens:

- Order Details
- Order Item Details
- Receive and Invoice

Changing the resource of an order item allows you to:

- Automatically adjust the Processing Type and Acquisitions Type when switching between resource types
- Correct yourself if you have selected the incorrect WorldCat knowledge base record
- Renew an item and change the knowledge base record afterward, in the case that it changed publisher or package

Change the resource for an order item from one WorldCat knowledge base resource to another

1. In the left navigation, navigate to one of the following:
   - Order Details screen: Orders > Orders > Search > Order Name (to view the resources associated with the order)
   - Order Item Details screen: Orders > Order Items > Search > Title
   - Receive and Invoice screen: Receive and Invoice > E-Product (Processing Type) > View Items > Search > Title

2. Hover over the information icon (i) next to the title whose resource you wish to change.
   Note: The content of the information pop-up window depends on whether the resource is a WorldCat knowledge base collection, title, or a WorldCat title.

3. From the Information pop-up window, click Change Resource. The Change Resource dialog appears with two tabs: Discover Items (WorldCat resources) and Discover Collections (WorldCat knowledge base resources).
   Note: By default:
   - The Change Resource dialog will open on the tab relevant to the order item you selected, with a search by the title of the order item automatically entered.
   - Search results are also limited to My Selected Collections. To see the collections in the global knowledge base, deselect My Selected Collections.

4. From the Discover Collections tab, select a search scope and index.
   - Collection (default) - Search by collection name
+ Title - Search by title, ISBN, ISSN, or OCLC number.

5. Enter your search term in the search field. If no search criteria is entered in the search field, all items are returned in the search results.

6. Click Search or press <Enter>.

7. Click on the name of the collection you wish to select as your new resource.

8. From the Change Resource confirmation screen, select an Acquisition Type from the drop-down list.
   - Subscription
   - One-Time

9. Click Change to confirm your choice. Your screen will refresh and the new resource name will appear on the screen.

Change the resource for an order item from a WorldCat knowledge base resource to a WorldCat resource

1. In the left navigation, navigate to one of the following:
   - Order Details screen: Orders > Orders > Search > Order Name (to view the resources associated with the order)
   - Order Item Details screen: Orders > Order Items > Search > Title
   - Receive and Invoice screen: Receive and Invoice > E-Product (Processing Type) > View Items > Search > Title

2. Hover over the information icon (i) next to the title whose resource you wish to change.
   Note: The content of the information pop-up window depends on whether the resource is a WorldCat knowledge base collection, title, or a WorldCat title.

3. From the Information pop-up window, click Change Resource. The Change Resource dialog appears with two tabs: Discover Items (WorldCat resources) and Discover Collections (WorldCat knowledge base resources).
   Note: By default, The Change Resource dialog will open on the tab relevant to the order item you selected, with a search by the title of the order item automatically entered.

4. Click the Discover Items tab.

5. From the Discover Items tab, select a search scope from the Scope drop-down list.

   Available search scopes
   - All WorldCat (default)
   - My Library Holdings

   Available search indexes
   - Keyword (default)
   - Title
   - Author
   - ISBN
   - ISSN
   - OCLC Number
For more information on indexes, see Searching WorldCat Indexes.

6. Enter your search term(s) in the search field. If no search criteria is entered in the search field, all items are returned in the search results.

7. (Optional) If you would like to include Articles in your search results, select Include Articles.

8. Click Search or press <Enter>.

9. Click on the name of the collection you wish to select as your new resource.

10. From the Change Resource confirmation screen, select an Acquisition Type and Processing Type from the drop-down lists.
   
   a. Acquisition Type
      
      • One-Time
      
      • Subscription
   
   b. Processing Type
      
      • Monograph
      
      • Serial
      
      • Electronic Product
      
      • Monographic Series (only available if Acquisition Type = Subscription)

11. Click Change to confirm your choice. Your screen will refresh and the new resource name will appear on the screen.

Change the resource for an order item from one WorldCat resource to another

1. In the left navigation, navigate to one of the following:
   
   ◦ Order Details screen: Orders > Orders > Search > Order Name (to view the resources associated with the order)
   
   ◦ Order Item Details screen: Orders > Order Items > Search > Title
   
   ◦ Receive and Invoice screen: Receive and Invoice > E-Product (Processing Type) > View Items > Search > Title

2. Hover over the information icon (i) next to the title whose resource you wish to change.
   Note: The content of the information pop-up window depends on whether the resource is a WorldCat knowledge base collection, title, or a WorldCat title.

3. From the Information pop-up window, click Change Resource. The Change Resource dialog appears with two tabs: Discover Items (WorldCat resources) and Discover Collections (WorldCat knowledge base resources).
   Note: By default, The Change Resource dialog will open on the tab relevant to the order item you selected, with a search by the title of the order item automatically entered.

4. From the Discover Items tab, select a search scope from the Scope drop-down list.

   Available search scopes
   
   ◦ All WorldCat (default)
   ◦ My Library Holdings
Available search indexes

◦ Keyword (default)
◦ Title
◦ Author
◦ ISBN
◦ ISSN
◦ OCLC Number

For more information on indexes, see Searching WorldCat Indexes.

5. Enter your search term(s) in the search field. If no search criteria is entered in the search field, all items are returned in the search results.

6. (Optional) If you would like to include Articles in your search results, select Include Articles.

7. Click Search or press <Enter>.

8. Click on the name of the collection you wish to select as your new resource.

9. From the Change Resource confirmation screen, select an Acquisition Type and Processing Type from the drop-down lists.
   a. Acquisition Type
      • Subscription
      • One-Time
   b. Processing Type
      • Electronic Product
      • Monograph
      • Serial
      • Monographic Series (only available if Acquisition Type = Subscription)

10. Click Change to confirm your choice. Your screen will refresh and the new resource name will appear on the screen.

Change the resource for an order item from a WorldCat resource to a WorldCat knowledge base resource

1. In the left navigation, navigate to one of the following:
   ◦ Order Details screen: Orders > Orders > Search > Order Name (to view the resources associated with the order)
   ◦ Order Item Details screen: Orders > Order Items > Search > Title
   ◦ Receive and Invoice screen: Receive and Invoice > E-Product (Processing Type) > View Items > Search > Title

2. Hover over the information icon (ℹ️) next to the title whose resource you wish to change.
   Note: The content of the information pop-up window depends on whether the resource is a WorldCat knowledge base collection, title, or a WorldCat title.

3. From the Information pop-up window, click Change Resource. The Change Resource dialog appears with two tabs: Discover Items (WorldCat resources) and Discover Collections (WorldCat knowledge base resources).
Note: By default:
- The Change Resource dialog will open on the tab relevant to the order item you selected, with a search by the title of the order item automatically entered.
- Search results are also limited to My Selected Collections. To see the collections in the global knowledge base, deselect My Selected Collections.

4. Click the Discover Collections tab.

5. From the Discover Collections tab, select a search scope from the Scope drop-down list.
   - Collection (default) - Search by collection name
   - Title - Search by title, ISBN, ISSN, or OCLC number

6. Enter your search term in the search field. If no search criteria is entered in the search field, all items are returned in the search results.

7. Click Search or press <Enter>.

8. Click on the name of the collection you wish to select as your new resource.

9. From the Change Resource confirmation screen, select an Acquisition Type from the drop-down list.
   - Subscription
   - One-Time

10. Click Change to confirm your choice. Your screen will refresh and the new resource name will appear on the screen.

**View the WorldCat record for an order item**

You can view the WorldCat bibliographic record for an order item from the following screens:

- Order Item Details screen
  - Note: This functionality does not apply to items with a processing type of Electronic Product or Local.
- Receive and Invoice - Monographs screen
- Receive and Invoice - Serials screen

This allows you to verify that the record for a received item is correct by:

- Viewing the metadata and, if needed, editing a record before receiving (Record Manager)
- Viewing the patron-facing record (WorldCat Discovery)

To view the WorldCat record for an order item:

1. From the Receive and Invoice screen, hover over the information icon (i) next to the order item title.
2. The information pop-up window provides the following links:
   - View/Edit Metadata - Click to open the full MARC 21 bibliographic record in Record Manager. This link only appears if you have permission to view Metadata.
   - View in WorldCat Discovery - Click to open the bibliographic record in your WorldCat Discovery instance.

**Change the resource for an order item from one local**

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Order/Change_the_resource_for_an_order_item

Printed: Wed, 08 Dec 2021 22:04:01 GMT
resource to another

1. In the left navigation, navigate to one of the following:
   ◦ Receive and Invoice screen: **Receive and Invoice > Local - One Time** (Processing Type) > **View Items > Search > Title**
   ◦ Receive and Invoice screen: **Receive and Invoice > Local - Subscription** (Processing Type) > **View Items > Search > Title**

2. Hover over the information icon (ℹ️) next to the title whose resource you wish to change.

3. From the information pop-up window, click **Change Resource**.

4. From the Change Resource dialog, select a search scope from the Scope drop-down list.
   ◦ **Local Resource Name** (default) - Search by the name of the local resource
   ◦ **Description** - Search by the description provided for the local resource

5. Enter your search term(s) in the search field. If no search criteria is entered in the search field, all items are returned in the search results.

6. Click **Search** or press <Enter>.

7. Click on the **name** of the local resource you wish to select as your new resource.

8. From the Change Resource confirmation screen, select an **Acquisition Type** from the drop-down list.
   ◦ **One-Time**
   ◦ **Subscription**

9. Click **Change** to confirm your choice. Your screen will refresh and the new resource name will appear on the screen.