WorldShare Acquisitions release notes, September 2019

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Release Date: September 19, 2019

Introduction

This release of WorldShare Acquisitions provides 4 new features and enhancements in addition to numerous bug fixes. These features will help you manage more complex workflows, including:

• Managing additional local identifiers for your vendors
• Managing bank account information for your vendors
• Accessing My Labels functionality from within Acquisitions
• Indicating number of volumes for an order item using the Statistics Value field

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.
Consider whether your library wishes to make use of the Statistics Value field for tracking the number of volumes for an item.

**New features and enhancements**

**Using additional local identifiers for your vendors**

You can now manage two additional local identifiers for your vendors within vendor management. The addition of these fields means you do not have to use workarounds, such as use of the Notes field, for storage and display of these identifiers. Previously, you only had access to a system-generated vendor number and user-entered set of match codes for local identifiers. Now, you have access to the following two local identifiers:

- Accountancy System ID
- ILS Supplier Number

These new fields will allow you to track new information about your vendor. The Accountancy System ID will allow you to track the identifier used by your parent institution’s financial system. The ILS Supplier Number will allow you to track the identifier used by your previous ILS.

Note! Both of these fields are also available via the Platform API.

To use these new fields:

1. Go to Vendors in the left-hand menu.
2. Search for a vendor using the left-hand search box.
3. Open the vendor from the search screen.
4. Scroll down and open the Local Identifiers accordion menu.
5. Enter the desired information into the two new fields listed below Match Codes in this section.

Managing bank account info for your vendors

You can now manage bank account information for your vendors within vendor management. This will allow you to store and retrieve key payment and other information about the bank account of the vendor directly in Acquisitions. Previously, you would have to store this outside vendor management, either in your parent institution's financial system or elsewhere. The fields stored include:

- Name of Financial Institution
- Location of Financial Institution
• Payment Recipient
• Bank Code
• Account Number
• Bank Identifier Code (BIC) / SWIFT code
• International Bank Account Number (IBAN)

Note! All of these fields are available via the Platform API.

To use these new fields:

1. Go to Vendors in the left-hand menu.
2. Search for a vendor using the left-hand search box.
3. Open the vendor from the search screen.
4. Scroll down and open the Bank Account Info accordion menu.

5. Enter the desired information into the two new fields listed below Match Codes in this section.
Accessing My Labels functionality from within Acquisitions

You can now access your spine label printing functionality from within Acquisitions. This allows you to create, manage, and print spine labels for items without leaving Acquisitions. Previously, you had to go to the Metadata application in order to access My Labels, but now, you can access it directly from the bottom of the left-hand menu of the Acquisitions application.

Your WorldShare account needs to have one of the following roles assigned before you can access My Labels in Acquisitions:

- Acquisitions_Admin
- Acq_Receive_Staff
- Serials_Admin
- Serials_Receive

To print labels using My Labels:

1. Scroll to the bottom of the left-hand menu of the Acquisitions application and click on the My Labels accordion menu (just above the Settings menu).
2. Create a Label Template under Label Templates using your label specifications.
3. Create a Label Print List.

4. Add items to the Label Print List using the Send to Label Print button on the item details screen or My LHRs search.

5. Open your Label Print List to edit and print your labels

**Indicating number of volumes for an order item using the Statistics Value field**

You can now track the number of volumes associated with an order item using the Statistics Value field. This field allows you to both track this information in Acquisitions and and eventually to report on the summed totals of these volumes in Analytics. (This work precedes the Monographic Series coming early next year that will also support tracking multiple volumes for an order item.) Previously, you would have to use a custom field for this information, which cannot be as easily summed using Analytics.

Note! The support for this field in Analytics will follow later in the year with the next release of Analytics.
To use the statistics value field,

1. Contact your library’s implementation person or OCLC customer support staff to enable the field for your library.
2. Open an order item from either the order page or the order item search.
3. From the General tab, locate the Statistics Value field to the right of Material Type and ISBN fields.
4. Enter a number between 1 and 99 for the Statistics Value. (Note! The field defaults to one, and zero is not an allowed value.)

Bug fixes

Tax amount now shows correct non-zero value

The Tax Amount field on the invoice now shows the sum of the Tax 1 and Tax 2 fields. Previously, this field (if enabled) was showing 0.00 inside a number input, instead of showing the appropriately calculated amount as a read-only value.

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