WorldShare Acquisitions release notes, January 2020

Release Date: January 16, 2020

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:

• Managing receiving and invoicing of monographic series
• Showing invoice items for all subscription periods
• Utilize binding status in WorldShare Reports serials received universe

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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If you begin using monographic series functionality, note that in your reports you will currently see a record received and ordered for both the monographic series itself as well as its volumes. This may result in double-counting. In the near future, we will have a feature in Analytics that will allow you to exclude either items that belong to a monographic series, but that feature is not present yet.
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**

Review the library’s policies and procedures regarding processing of monographic series. You may want to take advantage of the new functionality regarding monographic series detailed below.

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**New features and enhancements**

**Managing receiving and invoicing of monographic series**

You can now better manage monographic series workflows using WorldShare Acquisitions. This includes enhanced support for the receiving, invoicing, and budgeting processes for monographic series. This creates efficiencies for your library by allowing you to handle more complex workflows with less time and effort by staff.

Some specific features of this monographic series support include:

1. The ability to encumber money for the entire monographic series but expend money using the individual volumes, reducing the encumbrance for the entire series when you pay for each volume. This allows you to track how much you plan to spend on a monographic series in comparison to what you actually have spent.
2. The ability to receive each volume of the series on its own bibliographic record, allowing you to track which titles are received as part of the monographic series and creating holdings for these items in WorldCat for your collection.
3. The ability to view all titles and invoices for all subscription periods of a monographic series, supporting easy access to all data about a monographic series subscription.

Previously, monographic series were managed by adding titles to a Standing Order and then receiving and invoicing these titles. This did not allow you to identify the specific monographic series ordered or encumber money for it on your budget. Now, you can manage both the series and its volumes, along with the relevant budgetary transaction related to the series.

Following are detailed the steps related to managing monographic series and some of the features enabled this new workflow.

Note: In WorldShare Reports, receiving and ordering reports will continue to show both a record for the monographic series itself as well as its volumes. This may result in double-counting of receiving and ordering counts. In the near future, it will be possible to exclude items belonging to a series from these reports, but this feature is not yet complete.

**Ordering a monographic series**

The first step in managing a monographic series is ordering the monographic series. This process is essentially the
same as ordering any other type of item (e.g. serial, monograph, e-product) with a few minor differences.

To order a monographic series:

1. Use Discover Items to locate the monographic series you wish to order. (Note: You cannot currently search Discover Collections for a monographic series.)
2. Click Add To > Order next to the monographic series.
3. For the Acquisitions Type, select Subscription. This will add the Monographic Series as an option to the Processing Type field.
4. Select Monographic Series as the Processing Type.
5. Add any additional information about the monographic series, such as ISSN and start/end dates. You can also select an order item template to use for adding the monographic series to the order.
6. Find the order to which you want to add the monographic series or create a new order.
7. Click the Add button next to the order to add the monographic series to the order.
8. Navigate to the order and enter any relevant details for the monographic series like fund, location, price, notes, etc.
9. After adding all the relevant items to that order, place the order. (Note: After placing the order, the selected fund(s) for the item will be encumbered by the total amount for the order item.)
10. If you forget to select the Processing Type of monographic series, you can later select this Processing Type for the item as long as the Acquisitions Type is set to Subscription. Note: If you mistakenly selected the Processing Type
of Monographic Series for an item, you can change the Processing Type as long as you have not added any volumes to the series. (See steps on Adding and removing volumes to a series below.)

11. You cannot change the Acquisitions Type to One-Time if the Processing Type is Monographic Series. If you attempt to do so, you will receive an error stating that you must first change the Processing Type of the item to something other than Monographic Series before you can change the Acquisitions Type.

Adding/removing series volumes for a monographic series

The next step is adding the respective volumes to the monographic series, which typically happens after the volume is received by the library. You also have the option to receive and invoice the item at the same time as you are adding the volume to the series.

There are two ways to add a volume to a monographic series from the Discover Items screen or from the order item details screen.

To add a volume to a monographic series from Discover Items:

1. Search Discover Items for the specific volume you want to add to the series.
2. Click Add To > Series next to the item.
3. In the resulting dialog, search for the monographic series where the volume will be added.
4. You can search by the same fields used for the order items (including title, ISSN, OCLC Number, etc.)
5. You can also filter monographic series items by Vendor or Budget Period.
6. You can only add volumes to a monographic series where the order has been placed and the Receipt Status is either Not Received or Partially Received. A full received monographic series is considered closed, and you can no longer add titles to this series. (You can re-open the series, if needed, however. This is detailed below.)
7. To finalize adding the item to the series, click Add to Series.
8. Once you have added the volume to the series, you will see a dialog asking if you wish to receive this item now or later. (Note: The location and quantity of the series volume will be the same as that of the monographic series itself.)

9. To receive the item immediately, click Receive Item Now. This will take you to the Receive and Invoice screen with this volume automatically selected. To receive and/or invoice the item, follow the instructions under "Receive and/or invoice series volumes" below.
10. To receive the item later, click Receive Later. This will close the dialog and allow you to continue your work and receive the item at a later time.

Note: The order item number for the series volume will be of the form [order number]-[sequential integer for order item]:[sequential integer for volume]. For example: PO-2019-1-1:1.

To add a volume to a monographic series from the order item details screen:

1. Open the order item details page for the monographic series to which you want to add a volume. (You can do this by searching under Orders > Order Items and clicking the title of the series or by navigating to the order itself and clicking on the title of the series.)

2. Click on the new Series Info tab for the order item.

3. Click the Add Volume button at the top of the table of series volumes.

4. This will open a dialog that will allow you to search WorldCat for the volume you wish to add to the series.

5. Search for the volume you wish to add.

6. Click on the title of the item you wish to add to the series. (This will add the volume to the series. The location and quantity of the series volume will be the same as that of the monographic series itself.)
7. You will again be shown a dialog asking whether you want to receive the item now or later. Select the appropriate option for your workflow.

8. The location and quantity of the series volume will be the same as that of the monographic series itself.

If you mistakenly add a volume to a series, you can also remove a volume from a series as long as it has not been received or invoiced.

To remove a volume from a series:
1. Navigate again to the order item details screen for the monographic series. (See instructions in step 1 immediately above.)

2. Click on the Series Info tab.

3. Find the volume you wish to remove in the table of series volumes below.

4. Click on the Delete button next to the series volume you wish to remove.

5. Confirm that you want to delete the series item from the series.

**Cancel monographic series**

You can also claim or cancel the monographic series itself as well as claim individual volumes of the series. The claiming process for series and series volumes is the same as for other items and is documented here. Cancellation of the series itself, however, is different.

Note: You cannot cancel an individual series volume. You must delete it if no longer needed. If you attempt to cancel a series volume, it will appear in the Items that Cannot Be Cancelled section with the reason "Item is a volume of a monographic series."

To cancel a monographic series:

1. Search for the monographic series under Orders > Order Items.
2. Select the monographic series.
3. Click Cancel > Cancel Items at the top of the screen.
4. You will see the cancellation dialog for items. However, the normal options for selecting All Copies, Copies Not
Received, or Copies Not Received or Invoiced are not present. Instead, you simply select the Quantity you want to cancel.

5. Cancelling a series will prevent you from adding any additional volumes to the series. However, it will not impact receiving or invoicing of volumes already added.

Receive and/or invoice series volume for monographic series

Once you have added the series volume to the monographic series, you will want to receive and invoice the series volumes. This works in the same way as receiving and invoicing any monograph. The only difference is that you have the option to mark the series as complete and clear the encumbrance during the receiving and invoicing process. This enhanced workflow is described below.

Mark series as complete and clear encumbrance for monographic series

Once you have received and invoiced all volumes of a monographic series for a specific subscription period, two steps are needed to mark the series as complete for that subscription.

1. You will need to mark receiving as complete. This changes the Receipt Status of the series from Partially Received to Received and prevents you from adding any more series volumes to the series. This step is recommended to update the Receipt Status but is not required.

2. You will also need to clear any remaining encumbrance for the series. This removes any remaining encumbrance after the volumes have been paid and changes the Purchase Status from Partially Paid to Paid (if all volumes of the series have been paid). This latter step is required if there is any remaining encumbrance left on the series and you do not want to transfer it to the next budget period. It is also recommended if you want to keep the Purchase Status from always indicating the item is Partially Paid.

There are two places where you can mark the series as complete and clear the encumbrance:

1. During the receiving and invoicing process. Use this process when you know you are receiving and/or invoicing
the final volume in a monographic series and want to go ahead and indicate this is the last volume at the time of receiving and invoicing.

2. From the order item details screen. Use this process at the end of a budget period to clear any remaining encumbrance and prepare for closing your budget.

To mark the series as complete and/or clear any remaining encumbrance during receiving and/or invoicing:

1. Click Receive and Invoice in the left-hand menu

2. Select the appropriate action from the left-hand dropdown and receive and/or invoice the item as appropriate. (Follow the same procedure as for receiving and/or invoicing any monograph items.)

3. If you are receiving the last copy of the last volume of a monographic series, a dialog will appear after receiving that allows you to complete receiving of the monographic series. This will update the Receipt Status of the series to Received and prevent adding additional series volumes to the series.

4. If you are invoicing the last copy of the last volume of a monographic series, a dialog will appear after invoicing that allows you to clear any remaining encumbrance for the series. This will clear any remaining encumbrance and mark the monographic series as paid for that subscription period once all invoices have been paid.
5. If you are receiving **and** invoicing the last copy of the last volume of a monographic series, a dialog will appear after receiving and invoicing that allows you to both complete receiving of the series and clear any remaining encumbrance. If you check the option to complete receiving, the option to clear any remaining encumbrance will be automatically selected, since the assumption is that if receiving is complete you will also want to clear any remaining encumbrance.

![Receiving and Invoicing Series Item](image)

Note: If you mistakenly complete receiving of the series or clear the encumbrance before the last volume is received, you can undo these action from the order item details screen. This is detailed in the section below.

To mark the series as complete and/or clear any remaining encumbrance from the order item details screen:

1. Go to Orders > Order Items.
2. Search for any monographic series items for which receiving may need to be completed or the encumbrance may need to be cleared. To do this, you may use the following order item filters:
   - Processing Type (selecting Monographic Series will allow you to view all monographic series items)
   - Budget period (selecting the current budget period will allow you to restrict your search to monographic series in the current budget)
   - Receipt Status (selecting Not Received and Partially Received will allow you to see all series items not completely received)
   - Purchase Status (selecting all Purchase Statuses except Paid will allow you to see all series where you have not cleared the encumbrance)
   - Encumbrance (selecting encumbrance more than 0 will allow you to see all series where the encumbrance is greater than 0)

   Note: You do not need to use all the above filters. For example, you would only use the Encumbrance filter if you want to restrict your search to series items where the encumbrance has not reached zero. In many cases, you will want to see all monographic series - even those that have reached zero-dollar encumbrance - in order to update their Receipt Status and Purchase Status to the appropriate values.

3. Click on the title of the monographic series for which you want to complete receiving or clear the encumbrance.
4. To complete receiving of the series, click on the Series Info tab and then click on Mark Series as Complete.
5. This will open a dialog that will also allow you to clear any remaining encumbrance at the same time as completing receiving.

6. To re-open the series, if you have marked the series as complete by mistake, click on Re-Open Series in the Series Info tab.
7. To clear the encumbrance without first completing receiving, go to the Budget/Fund tab and click Clear Encumbrance.

8. If you mistakenly clear the encumbrance before you have received the final volume, you can restore the encumbrance back to its original value.
View additional information about monographic series

There is also additional information you can view about monographic series that may be helpful. This includes:

- Viewing the full payment amount for the monographic series, including the amount paid for all volumes.
- Locating and viewing series volumes from the order item search.
- Viewing series volumes from the Series Info tab, including series volumes for all subscription periods.

To view the full payment amount for a monographic series:

1. Search for the monographic series under Orders > Order Items.
2. Enable the Payment Amount column using the gear icon on the top-right of the table.
3. View the payment amount for the monographic series.

Note: Restore encumbrance will also restore the previous payments. Copies will no longer be marked as paid.
4. Alternatively, you can click on the title of the monographic series and then click on the Pricing tab.

5. The Payment Amount will display near the bottom of the page.

Note: The Payment Amount will include the total amount paid for all volumes of the monographic series.

To locate and view a specific series volume:
1. Click on Orders > Order Items
2. Search for the Series Volume you want to view.
3. Click on the Title of the Series Volume.
4. An order item details page will display for the Series Volume with the following tabs:
   - General
   - Order (more information on this below)
   - Location (can change the Location from the default Location of the monographic series, as long as the item is not received)
   - Invoice (shows the invoice items related to the series volume)
   - Custom Fields

5. You can also view the Series to which the volume belongs by going to the Order tab. At the bottom of this page is information about the Series Title and Order Item Number.
To view series volumes for a specific monographic series:

1. Click on Orders > Order Items
2. Search for the related monographic series
3. Click on the Title
4. Click on the Series Info tab
5. View the series volumes in a table
6. You can click on the Title/Name of the volume to view the series volume itself.

7. If you want to view the series volumes not only for the current subscription period but for all subscription periods, you can click on the Show items for all related subscription periods checkbox.

Showing invoice items for all subscription periods

You can now view the invoice items for all subscription periods of a subscription. This allows you to quickly see all invoice items related to not just one year of a subscription but all years. Previously, when viewing a subscription, you could only view the invoice items for a single subscription period. Now, with a single click, you can view all invoice items for all subscription periods.

To view invoice items for all subscription periods:
1. Search for a specific subscription under Orders > Order Items.
2. Click on the title of the item.
3. Click on the Invoice tab.
4. Click on "Show invoice items for all related subscription periods."

Utilize binding status in WorldShare Reports serials received universe

You can now view the binding status of serials inside the Serials Received universe in WorldShare Reports. This makes it possible to use WorldShare Reports to identify serial issues that need to be gathered for binding. For example, you can modify the serials received report to only include issues with binding status "Not bound." This will display all not bound issues received in a given time period by publication pattern. This allows you to determine when to examine a serial title for possible binding by comparing the number of unbound issues to the publication frequency (e.g. 4 unbound issues for quarterly).

This field was not available prior to this release. Additional information regarding the binding of serial issues can be found in the November release notes of WorldShare Acquisitions.

**Binding Status:** Status which determines where in the binding process a specific serial issue is (e.g., Not Bound, Pending, Sent to Bindery, Bound)
Bug fixes

ISBN search now working on Receive and Invoice screen

You can now search by any ISBN on the Receive and Invoice screen and receive the appropriate items in the results. Previously, searching on the Receive and Invoice screen by ISBN would not return the desired items because ISBN search needed an exact match (including qualifier) to return results. Now, the ISBN search is a starts-with search, allowing items with qualifiers in their ISBN field to be returned as well.
Grand totals for invoices show correct amount

You can now view the correct Grand Total for all invoices in WorldShare Acquisitions. Previously, a handful of invoices were not showing the correct Grand Total. Now, all invoices are showing the correct Grand Total.

Known Issues

Monographic series items not on Received by Location report

Monographic series items will not show up on the Received by Location report in Analytics unless you set the Date Received to start at 00000. This is due to a problem with the Date Received not being set for monographic series. This will be fixed in a subsequent release.

Attempting to renew items from multiple vendors results in an error

If you attempt to renew items from multiple vendors, the system will give you a technical error message rather than the appropriate error message that renewing items from multiple vendors is not allowed. This will be fixed in a subsequent release.

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