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**Release Date:** July 31, 2016
Import of EDIFACT invoice now verifies vendor of order item

ISBN no longer matches on parenthetical text

Second line of notes field now searchable without asterisk in front

Important links
Introduction

This release of WorldShare Management Services provides nine new features and enhancements, in addition to numerous bug fixes. Many of the enhancements are the direct result of user 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 actions or decisions.

<table>
<thead>
<tr>
<th>Action</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Adjust any custom reports that use the Order Status field, since it has now been split into two fields: Order Status and Receipt Status.</td>
<td>7-8</td>
</tr>
</tbody>
</table>

Follow-up actions

In an effort to keep your staff informed of new features and changes, you may also want to consider these items.

<table>
<thead>
<tr>
<th>Action</th>
<th>Page Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Recommend to staff to redo and update any bookmarked searches that use the Order Status field, since it has now been split into two fields: Order Status and Receipt Status.</td>
<td>7-8</td>
</tr>
<tr>
<td>❑ Update library best practices and procedures related to cancellation, especially as regards cancellation of subscription prior to renewal. Instead of renewing items and then processing the cancellation, libraries can now cancel the current subscription before it is renewed, if this better fits their workflows and reporting needs. Note! If this is done, the last subscription of a chain of subscriptions will show as cancelled, even if most of the content for that subscription was received.</td>
<td>7-9</td>
</tr>
<tr>
<td>❑ Update library best practices and procedures related to adding and editing notes for order items, as well as change invoice and budget procedures to reflect the new invoice item and fund notes. Questions to keep in mind include: When do you include information in an existing order item note and when do you add it to a new note? When do you copy information from an order item note to an invoice item note? When should you add notes to funds?</td>
<td>14-23</td>
</tr>
</tbody>
</table>
Acquisitions

New Features

Enhanced cancellation workflows
The cancellation workflows in WorldShare Acquisitions have been greatly enhanced for this release, allowing you to:

- Request and confirm cancellation of items
- Undo cancellation of items
- Cancel received and invoiced items
- Send to vendor the end-date for subscriptions

Request and confirm cancellation of items

Library staff can now request cancellation from a vendor and wait for confirmation before finalizing cancellation of the item in the system. This allows you to track those items separately for which you have requested cancellation but have not received final confirmation from the vendor. For example, let’s say you want to cancel a recently ordered monograph, but you are not sure the Vendor will let you. Before sending the cancellation message for an item, you can choose to request confirmation from the vendor. This will result in several things happening:

- The cancellation message will include a note to the vendor to confirm cancellation.
- The Order Status will change to “Cancellation Requested” instead of “Cancelled.”
- Any encumbered money will remain encumbered.

Then, once you receive confirmation from the Vendor, you can find the item and “Confirm Cancellation.” This will change the status to “Cancelled” and un-encumber any money.

To request confirmation when cancelling, you must first find the item you want to cancel using one of the following screens:

- Claim & Cancel > Missing Order Items
- Order & Renew > One-Time Items
- Order & Renew > Subscription Items

Once you have found the item, you select it (using the checkbox on left of screen), click the Cancel button as normal, and then select “Cancel Items” from the menu.
Then, within the cancellation dialog that appears, you select “Notify Vendor of cancellation” and then “Request confirmation from Vendor.” Finally, you click Continue to configure sending of the cancellation message. After you send the message, the copies will have the status “Cancellation Requested” as described above.

Once you have received confirmation of cancellation, you will need to find the item again, select it, and click Cancel > Confirm Cancellation.

Note! To find the item, you can narrow your search using the Order Status filter to see only items with the status of “Cancellation Requested.”
A dialog will appear that allows you to confirm cancellation of the item. This will change the status of the item to Cancelled and un-encumber the money from the budget.

If the vendor does not confirm cancellation of the item or copies, you may need to undo cancellation of the item. Undo cancellation is described below.

**Undo cancellation of items**

Undoing cancellation of an item may be necessary if:

- The Library has requested cancellation of an item but the vendor has refused the request; or . . .
- The Library has un-intentionally cancelled an item or copy and needs to undo cancellation so that they can receive the item.

As with confirming cancellation of an item, to undo cancellation of an item, you must first find the item in question and select the item.

Then, you must click Cancel > Undo Cancellation at the top of the screen.
Finally, within the dialog that appears, you must confirm that you want to undo cancellation.

A few things to note:

- When undoing cancellation of an item, all copies of an item will be returned to the Order Status of “Ordered.” This includes copies with the status of “Cancelled” or “Cancellation Requested.” (“Ordered” is a new status and described in the section below.)
- You are also free to cancel previously cancelled items, even if they were cancelled before this release.
- Undoing cancellation of an item that has the “Display in WorldCat Local” box checked will not add the on-order Local Holding Record back to WorldCat. The item will not show in WorldCat until the item is received.

**Cancel received and invoiced items**

Library staff can also now cancel received and invoiced copies of an item. This allows you to now:

- Cancel subscriptions before renewing them for the year;
- Cancel monographs and one-time items that were previously received and possibly even paid-for but later returned to the vendor.
Before moving on to how you can use this new functionality, however, it is important to note that because you can now cancel copies with the Order Status of Received, you can now have a copy that has both the status of received and canceled. Because of this, the Order Status field was split into two fields - Order Status and Receipt Status – in order to enable you to not lose the fact that the item may have been fully or partially received.

Furthermore, the possible values of the Order Status field have changed. They are now:

- Open
- Ordered
- Cancelled
- Cancellation Requested.

Additionally, the possible values of the new Receipt Status field are:

- Not Received
- Partially Received
- Received

Because the values of the Order Status have changed, you may need to adjust any custom reports you have created with the Report Designer tool. Current statuses were mapped to the new statuses in the following way:

<table>
<thead>
<tr>
<th>Old Order Status</th>
<th>New Order Status</th>
<th>Receipt Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Open</td>
<td>Not Received</td>
</tr>
<tr>
<td>Due</td>
<td>Ordered</td>
<td>Not Received</td>
</tr>
<tr>
<td>Cancelled</td>
<td>Cancelled</td>
<td>Not Received</td>
</tr>
<tr>
<td>Running</td>
<td>Ordered</td>
<td>Partially Received</td>
</tr>
<tr>
<td>Received</td>
<td>Ordered</td>
<td>Received</td>
</tr>
</tbody>
</table>

Note, however: Because there are now two status fields in the place of one, you are able to combine statuses in ways that was previously not possible. Again, the purpose of this is to allow items (and even individual copies of an item) to be both “Cancelled” and “Received” at the same time. However, the end result is more possible statuses.

Now, in order to actually cancel received or invoiced items, you need to first select one or more items to cancel and clicks Cancel > Cancel Items. Three options will then be presented you as radio buttons at the top of the subsequent dialog next to the label “Copies to Cancel.”
These three options include:

- **All copies**: This is used when the library wants to cancel the entire item and all its copies, for example a subscription item that will be discontinued for the next year. Note! This is the default selection.

- **Copies not received**: This is used when the library wants to cancel only copies that are not received (regardless of whether they have been invoiced or not), for example a one-time monograph item where the vendor can only provide some of the copies ordered and the rest have been cancelled (but the vendor has invoiced some or all of the cancelled copies).

- **Copies not received or invoiced**: This is used when the library only wants to cancel copies that are not received and not invoiced, for example a one-time monograph item where the vendor can only provide some of the copies ordered and the rest have been cancelled (but in this case, the vendor has only invoiced the received copies). Note! This was previously the only cancellation option available and is still the preferred option for many situations.

Note! Once you select one of the three radio buttons, the information within the dialog will be updated. Specifically, copies may move from the table at the top of the dialog, which shows the items that you are able to cancel, to the table that appears at the bottom of the page, which shows the copy or copies that Cannot Be Cancelled. The reason the copy cannot be cancelled also appears in the Reason column of this latter table.
Send to vendor end-date for subscriptions

Library staff now have new options when cancelling subscriptions. These include the ability to both:

1. Cancel selected copies only at the end of the subscription period; or...
2. Provide a specific date to the vendor indicating when the copy should be cancelled.

These options only appear when you have selected a subscription item for cancellation and allow you to communicate to the vendor whether you want to cancel the subscription after receiving all relevant materials or to cancel it in the middle of the subscription period.
A comment appears in the cancellation message based on which of these two options you have selected.

- Cancel subscriptions at the end of the subscription period
- Cancel subscriptions on [date]
Note! Because this new option only is presented when subscription items are selected, it is no longer possible to cancel subscription and one-time items together. You will receive an error message if you attempt to cancel both subscription and one-time items together.

Request quote

Library staff can now request a price quote for an order. This will help libraries to get the price of very expensive items before making the decision to place an order for the item.

To request a price quote for items on an order, you must first open an order by going to Order & Renew > Orders and clicking on the Order Number, then, from the bottom right of the Order Details screen, click “Request Quote.”
This will bring up the standard “Notify Vendor” panel where you can specify the Sending Method, Vendor Contact, and Reply-To information of the quote request.

After you have sent the price quote request for the order, you will notice the Status of the Order changes to “Open – Quote Requested.” Additionally, the order remains editable. This way, once you receive the price quote from the vendor, you can enter these prices into the order before deciding whether to order the items.

You can also search for Orders with the Status “Open – Quote Requested” from the Order & Renew > Orders screen.
Enhanced notes functionality

Libraries now benefit from enhanced notes functionality within WorldShare Acquisitions. This includes the ability to now:

- Add multiple notes to order items
- Attach notes to prior and subsequent renewals
- Show notes on payment and receiving
- Add notes to invoice items
- Add notes to funds

Add multiple notes to order items

Library staff can now add and edit multiple notes on an order item. This way, you can capture all kinds of important information collected over time about an item without putting it all into a single notes field.

For example, notes data could include (but is not limited to):

- Historical data regarding what has happened to an item, along with when it happened, and even why it happened;
- Important information to remember later, such as when receiving or paying for the item. (More on features related to this below.)

To add a note to an order item, you must first go to one of the following screens:

- Order Details Screen (Click on Order Number link from Order & Renew > Orders)
- Order Item Search Screen, accessible from the following:
  - Order & Renew > One-Time Items
  - Order & Renew > Subscription Items
- Outstanding Items Screen (Note! Must select the Mono. tab. in the left-panel.)
- Order Item Details Screen (Click on Title from either Order Item Search or Order Details screens above)
- Renewals Tab on the Order Item Details Screen (Go to Order Item Details screen and click on Renewals tab)

If using the Order Item Details Screen, you will need to click on the Notes tab at the top of the page.
From all but the Order Item Details screen, you will need to click on the Add Note or Edit Notes icons in the far-most right column of each page.

Note! These icons now not only appear on the Order Details page but on the order item search results, allowing you to add notes to an item when you are searching for it. For example, if you are about to claim or cancel an item from the Missing Order Items screen, you can first check to see if there are any notes on the item indicating a vendor response.

Note! Below the Add Note or Edit Note, you will also see a number contained in a circle. This number indicates the number of notes for that item and is automatically updated whenever adding or deleting notes.

After clicking on the Add Note or Edit Note icon, a dialog will appear that allows you to:
• Add new notes
• Edit existing notes
• Delete existing notes

To add a new note, click on the Add Note button at the top of the dialog. You will then be provided a form that allows you to save a new note to the order item. For order item notes, you must also select the Type of the note. Options include Vendor and Staff. Vendor notes will be included in the order message to the Vendor, however, below each item, so use this note type carefully. To create the note, click the Save button, and the Note will be added to the top of the dialog.
There are also “Attach to” and “Show on” options for some notes. These will be described further in the “Attach notes to prior or subsequent renewals” and “Show notes on receiving and payment” sections below.

Note! Below each note, the user and date/time of the note is also displayed. Additionally, notes will display in the dialog with the most recent note at the top.
To edit a note, you click the edit icon to the right of the existing note you want to edit. This will take you to the same form as when adding a note. Here you can edit all values of the note, including the Type and Note itself. When updating notes, however, you should be aware of the fact that the user and date/time of the note will both be updated with the most recent user and date/time upon saving changes.

To delete a note, you must click on the delete icon to the right of the existing note that you want to delete. You will be asked to confirm whether you really want to delete the note. If you confirm deletion, the note will be deleted permanently and cannot be later retrieve.

Note! Analytics is busy now updating their system to accommodate items with multiple notes. Until their next release, new notes added in Acquisitions will not be synchronized with their system and will not show up in custom created reports.

**Attach notes to prior and subsequent renewals**

Library staff can not only add multiple notes to an order item, but if the order item is a subscription, you have the option to attach a note to either:

- The current order item only, or . . .
- The current order item and all prior and subsequent renewals of that item as well.

This allows you to view notes for a subscription order item with all prior and subsequent renewals of that item, without recreating the same note multiple times on multiple order items.

To use this functionality, you should first add or edit a note to an existing subscription order item using the methods described under “Add multiple notes to an order item” above, then next to “Attach to”, select “This order item and all prior and subsequent renewals” and save the note.
Then, when you view the notes for a prior or subsequent renewal of this item, you will see this note displayed next to the other notes for that item.

Note! There is currently a bug with the searching for notes that prevents items from appearing if the option “Attach to: This order item and all prior and subsequent renewals” is selected. This bug will be fixed in an upcoming release, but in the meantime, you may want to use this feature selectively and/or note to yourself that searching by this note field will not be possible.

**Show notes on receiving and payment**

When adding or editing a note to a monograph order item, library staff can also now choose whether to show this note to fellow staff when:

- Receiving the item
- Paying for the item
- Receiving and paying for the item

This allows you to provide the content of these notes at the point in the workflow when that information is needed.

To mark a note to show on receiving or payment, you must select one of the options above from the “Show On” field when adding or editing a note.
If you select to show a note on receiving, the note will appear in a dialog where you can scan the barcode of the item. This dialog must be closed before proceeding with any further action on the item, so you are less likely to miss it.

Note! For now, notes currently only show on receiving for monograph items and not for serial or eproduct items.

Also note! If the monograph has holds or has a requestor, these message also now appear in a dialog, as reported in the enhancement “Dialog for Holds and Requestor Messages” below.

If you select a note to show on payment, the note will also appear in a dialog, this time when you pay an invoice that is linked to the related order item. The note text appears in the dialog and you must acknowledge the note before proceeding with payment.
Note! Invoice Item notes can also be marked as “Show on payment” but this will be covered in the next section.

**Add notes to invoice items**

Library staff can now add and edit notes to invoice items, as well as order items. This allows you to note important information about the invoice item before payment. Notes, however, can only be added, edited and deleted if the invoice is open. If the invoice is paid or marked as ready, the notes are not editable.

To add or edit notes for an invoice item, you must click on the Add Note or Edit Note icon in the far-right column of the Invoice Details page.

![Invoice Details with Notes](image)

This will bring up the Notes dialog. This Notes dialog looks and performs the same as the order item notes dialog, documented under Multiple Order Item Notes above.
As mentioned above, you can also mark invoice item notes as “Show on payment.” If you do, the note for the invoice item (along with any order item notes) will appear in a dialog upon payment of the invoice.

Also, you will not be able to generate custom reports containing invoice item notes until the next Analytics release.

Add notes to funds

Lastly, library staff can add and edit notes for funds on a budget. Like with order item notes and invoice item notes, you can add one or multiple notes as well as edit and delete them. This allows you to track changes to a fund as well as note the allowed uses of a fund, just as two examples.

Note! Notes for a fund can only be edited when the budget is not closed, however. Once a budget is closed, all fund attributes, including notes, are locked for editing.

To access notes for a fund, click on the Add Note or Edit Note icons in the Notes column. This appears to the left of the Action column on the budget page.
As with invoice item notes, refer to the section Multiple Order Item Notes for details on how to add, edit and delete notes within the dialog.

Also, you will not be able to generate custom reports containing fund notes until the next Analytics release.

Enhancements

Edit invoice number and invoice date
Library staff can now edit the invoice number and invoice date of open invoices. This enables you to easily correct mistakes made when creating invoices, saving the time and effort of re-creating the invoices from scratch.

Close all search tabs in Discover Items
Library staff can now close all search tabs under Discover Items in Acquisitions, saving you time closing each tab individually. After you perform a search in Discover Items, a tab opens in the left-panel. At the same time, a “Close all tabs” button appears and stays open as new searches are performed. By clicking on this button, you can close all search tabs in one click.
Default Acquisitions Type for WorldCat Knowledge base items

When adding a title from the WorldCat knowledge base to an order, the correct Acquisitions Type is now chosen by default. This means you do not have to change the Acquisitions Type when adding titles of type:

- eBook
- Audio
- Video
- Image
- Other

Rather, selection of titles with any of the above types will result in an order item with the Acquisitions Type “One-Time” while selection of titles with the type “Journal” will result in a “Subscription” order item.

Dialog for holds and requestor messages

Library staff will now find it impossible to miss the messages that appear when receiving a monograph item that:

1. Has circulation holds on it, or . . .
2. Has a requestor

Both of these messages now appear in a dialog that must be manually closed before proceeding with any more actions. Previously, these messages appeared at the top of the page where you could possibly miss them. These messages now appear alongside any notes that have marked as “Show on receiving.”
Note! In order for messages to appear on receiving, you must first have them configured by customer support or implementation. They do not appear by default for every institution.

Receipt statuses changes for serials and eproducts

Library staff can now view and understand the receipt status of a serial or eproduct on the Outstanding Items page more clearly. Now, before receiving an item, the status is Not Received, rather than Not Started. After you have started receiving the item, the status is Partially Received, and after finishing receiving the item, the status is Received.

Below are the old and the new statuses:

<table>
<thead>
<tr>
<th>Old Receipt Status</th>
<th>New Receipt Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>Not Received</td>
</tr>
</tbody>
</table>
Improved loading of Outstanding Items screen

Items on the Outstanding Items screen now load quicker, especially when first opening the page.

Vendor Order Number and Account Number cleared when changing Vendor

When Library staff change the Vendor of an order, the Vendor Order Number and Account Number data for that order is cleared, since this information is tied to that specific Vendor and therefore is no longer applicable.

Bug Fixes

All issues appear under Receive Issues

Library staff now see all issues on the Receive Issues page. Previously, not received issues would not show up without changing the value of the Received filter when using the Chrome or Firefox browsers.

Invoice date for EDIFACT invoices processed incorrectly

When importing EDIFACT invoices, the invoice date is now read using the correct format of YYYY-MM-DD. Previously, the system was inverting the month and date by using the format YYYY-DD-MM.

Removed USD from total column under Browse Invoices

Library staff no longer see USD in the Total column on the Browse Invoices page. Since invoices may have different currencies, based on the currency of the vendor, it did not make sense to show USD (or any currency designation) in the Total column.

Removed “,100” from GIR segment of EDIFACT order message

When transmitting the order message in EDIFACT format, the text “,100” no longer appears after the fund code in the GIR segment. The text “100” represented the percentage of the fund that was being used for the item; however, the EDIFACT standard only requires specifying the percentage if multiple funds are being used for the item.

Import of EDIFACT invoice links to most recent subscription item

When importing EDIFACT invoices, the system now invoices the most recent subscription item if the value of the RFF field matches a subscription item that has been renewed. This allows you to always make sure you are invoicing the most recent subscription rather than past subscription items that may have already been invoiced and paid-for. For example, if you upload an EDIFACT invoice that has an RFF+SLI value that matches the Vendor Order Item Number of a subscription item and the subscription item has been renewed (with the most recent subscription item containing the new Vendor Order Item Number), the system will match the invoice item to the most recent subscription item. The same goes
when importing an invoice with an RFF+LI value that matches the Order Item Number of a past subscription item. The system will take the most recent subscription item in the chain of renewals instead of the exact subscription item that was matched.

**Import of EDIFACT invoice now verifies vendor of order item**

When importing EDIFACT invoices, the system now verifies that the vendor of the invoice matches the vendor of the order item being invoiced. If the vendor does not match, then the item is not invoiced. This prevents you from inadvertently importing invoices for the wrong vendor.

**ISBN no longer matches on parenthetical text**

When importing MARC records that includes an ISBN in the 980 $k field, the system no longer insists that the ISBN in the MARC record include the same parenthetical text as in the WorldCat record. Previously, ISBNs imported in the MARC file were sometimes rejected because they did not contain the same parenthetical text (e.g. "paperback" or "hardback") that was in the ISBN in the WorldCat record, even if the ISBN itself matched perfectly.

**Second line of notes field now searchable without asterisk in front**

When searching by the notes field of an order item, library staff no longer need to add an asterisk if they want to search content contained in a second line of the note. Previously, the second line was not searchable unless you included an asterisk at the beginning of their search query.
Important links

Post release sessions
To help you become familiar with the new features, enhancements and improvements included in this release, there are two update sessions scheduled. Please note the session time zones when registering since they are being offered at times convenient for the Eastern USA and Australian Eastern time zones. The sessions will be recorded and archived for future viewing on the WMS USC Training page. Please register, even if you are unable to attend, to receive a link to the recorded session.

WMS Release Update Session
Date: Thursday, August 4, 2016, 12:00 pm, Eastern Daylight Time (New York, GMT-04:00)
Registration: https://oclc.webex.com/oclc/k2/j.php?MTID=t176a1fd14a218fb815813dce87cd567d

Support Web site(s)
Support information for this product and related products can be found at:

- Browser compatibility chart
- Release notes
- User Support Center

Next release
- September 29, 2016

Notices
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