WorldShare Acquisitions Release Notes, February 3, 2022

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Release Date: February 3, 2022

Introduction

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

- Supporting integration of Talis Aspire reading lists into Acquisitions
- Updating the branch and shelving location of on-order Local Holdings Record(s)
- Viewing user data when retrieving an order via the platform

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.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you are using Talis Aspire reading lists, you will want to consider enabling Talis Aspire integration for Record Manager and Acquisitions.</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>
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<tr>
<td>None at this time.</td>
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New features and enhancements

Supporting integration of Talis Aspire reading lists into Acquisitions

You can now view information about your Talis Aspire reading lists in Acquisitions. This new feature is for libraries that use Talis Aspire or are considering using Talis Aspire to manage reading lists for their courses. This allows you to view information about an item’s reading lists directly within Acquisitions rather than having to take the time to search Talis Aspire separately. This saves you time and supports improved workflows between Talis Aspire and Acquisitions. Previously, information from Talis Aspire was not displayed within the Acquisitions workflows, but now it is. Specifically, reading list information is available at the following points in the Acquisitions workflow:

- When viewing a resource using the information icon
- When adding items to an order
- When viewing a purchase request
- When receiving a monograph item
- When receiving a serial or eproduct
- When withdrawing a monograph item

Configure reading list information display

To enable reading list integration from Talis Aspire, you need to:

1. Log into Service Config for your institution.
2. In the left-hand panel, go to Third-Party Integrations > Talis Aspire Reading Lists.
3. In the main panel, select Display and then enter the Shortcode and select the Display Name for your Talis Aspire reading lists. For help with this, see the help documentation.

4. Once this is enabled, Talis Aspire reading list integration will be enabled in Record Manager, Discovery, and in Acquisitions.

View reading list information when viewing resource information

You can now view reading list information when hovering over the information icon in Acquisitions. There are multiple places where this information icon displays, including:

- Discover Items enhanced search results.
- Order page.
- Order item details page.
- Receiving screen.

Previously, you could view additional information about the resource in question by using the information icon pop-up, but you could not view reading list information. Now you can. Specifically, you can see:

- How many reading lists are associated with this item.
- How many reading lists are associated with different formats/editions of this item.
Additionally, you can view the specific reading lists being referenced in both cases.

To view this information in the information icon:

1. Look for the information icon in one of the following places:
   ◦ Discover items enhanced search results. The information icon displays to the left of the resource in question.
   ◦ Order item details page (Orders > Order Items > Click on the title of the item in question. > The information icon displays in the top-left of the page)
   ◦ Order page (Orders > Orders > Click on a specific order name or number > The information icon shows to the left of the title in the Order Items table)
   ◦ Receiving screen (Receive and Invoice > Search using search box at top of screen > View information icon to left of title)

2. Hover over the information icon.

3. Temporarily, "Looking for reading lists" text will display on screen while the reading list information is loading.

4. Near the top of the pop-up, reading list information will display as follows:
   1. Reading lists (this item): Shows the number of reading lists associated with this specific item as a link.
   2. Reading lists (editions/formats): Shows the number of reading lists associated with other editions or formats of this item as a link.
5. Clicking on the links will take you to a page that displays links to the specific reading lists themselves.
You can now view reading list information when adding an item to an order. This allows you to see whether an item you are planning to order (or one of its related editions or formats) is on a reading list.

To view the reading list information when adding an item to an order:

1. Search in Discover Items for an item.
2. Click on the Add to > Order button on the right of the page.
3. In the Add Item to Order dialog, the reading list information will display at the top of the dialog in a blue information widget.
4. If there is no reading list information for that title, the blue information widget will not display at all.

5. Clicking on the links will take you to a page that displays links to the specific reading lists themselves. (See screenshot for point 5 of “View reading list information when viewing resource information” above.)

### Viewing reading list information on a purchase request

You can now view reading list information when viewing a purchase request. This allows you to see whether an item you are considering for purchase (or one of its related editions or formats) is on a reading list.

To view the reading list information on a purchase request:

1. Open a Purchase Request item (Purchase Requests > Request Items > Search and click on the title of an item.)
2. On the Purchase Request page, the reading list information will display at the top of the page in a blue information widget.

3. If there is no reading list information for that title, the blue information widget will not display at all.

4. Clicking on the links will take you to a page that displays links to the specific reading lists themselves. (See screenshot for point 5 of "View reading list information when viewing resource information" above.)
Viewing reading list information when receiving a monograph

You can now view reading list information when receiving a monograph. This allows you to see whether an item you have purchased (or one of its related editions or formats) is on a reading list during receiving.

To view the reading list information when receiving a monograph copy:

1. Click on Receive and Invoice in the left-hand panel.
2. Select Processing Type: Monograph.
3. Select Action: Receive or Receive and Invoice.
4. If invoicing select an invoice or create a new invoice.
5. Search for the item you want to receive.
6. Enter a call number and barcode for the item and click enter while your cursor is in the barcode field.
7. If there is reading list information for the title, it will appear in the resulting Receiving Notes dialog along with hold, note, and requestor alerts.

![Receiving Notes dialog](image.png)

8. If there is no reading list information for that title, the Receiving Notes dialog will not display at all if there are no active alerts for the item.

9. Clicking on the links will take you to a page that displays links to the specific reading lists themselves. (See screenshot for point 5 of "View reading list information when viewing resource information" above.)

Viewing reading list information when receiving a serial or eproduct

You can now view reading list information when receiving a serial or eproduct. This allows you to see whether an item you have purchased (or one of its related editions or formats) is on a reading list during receiving.

To view the reading list information when receiving a monograph copy:

1. Click on Receive and Invoice in the left-hand panel.
2. Select Processing Type: Serial or E-Product
3. Select Action: Receive, Receive and Invoice, or Start Receiving.
4. Search for the item you want to receive.
5. Click on Start Receiving.
6. If there is reading list information for the title, it will appear in the resulting Receiving Notes dialog along with hold, note, and requestor alerts.

![Receiving Notes](image)

7. If there is no reading list information for that title, the Receiving Notes dialog will not display at all if there are no active alerts for the item.
8. Clicking on the links will take you to a page that displays links to the specific reading lists themselves. (See screenshot for point 5 of "View reading list information when viewing resource information" above.)

**Viewing reading list information when withdrawing an item**

You can now view reading list information when withdrawing an item. This allows you to see whether an item you are planning to withdraw from your collection (or one of its related editions or formats) is on a reading list. If an item is on a reading list, you may want to reconsider whether you should withdraw it from your collection.

To view the reading list information when withdrawing a monograph copy:

1. Click on Receive and Invoice in the left-hand panel.
2. Select Processing Type: Monograph.
4. Set the Receipt Status filter to Received.
5. Using the gear icon, enable the Receipt Status column.
6. Search for the item you want to withdraw.
7. In the Receipt Status column, click Withdraw.
8. If there is reading list information, then a blue information widget will display in the Withdraw confirmation dialog.
9. If there is no reading list information for that title, the blue information widget will not display at all.

10. Clicking on the links will take you to a page that displays links to the specific reading lists themselves. (See screenshot for point 5 of "View reading list information when viewing resource information" above.)

**Updating the branch and shelving location of on-order Local Holdings Record(s)**

You can now update the branch and shelving location of order items that have not been received, and any on-order Local Holdings Record(s) will be updated with the new branch and shelving location. This allows you to keep your on-order LHRs displayed for the right branch and shelving location in Discovery as well as keeping the hold policies for these on-order items associated with the correct branch. Previously, if you updated an un-received monograph item's branch and shelving location, the on-order LHR would stay associated with the previous branch and shelving location. Now, the on-order LHRs are updated to include the new branch and shelving location.

To change the branch and shelving location of an on-order LHR:

1. Place an order for a monograph item with the Display in WorldCat box checked. This will automatically create on-order LHRs for the item.
2. Do not receive the item yet.
3. Change the branch and shelving location for the unreceived order item. (Orders > Order Items > Search for the order item > Click on the title > Click on the Location tab.)
4. The on-order LHRs will be updated with the new branch and shelving location.

**User data returned when retrieving an order via the platform**

You can now retrieve user data for an order when retrieving an order via the platform. When combined with an associated call to WorldShare Identity Management API, this allows you to have auditing information about an order transferred to your campus accounting system. The data that can be retrieved about an order includes:
• The PPID of the user who created the order.
• The PPID of the user who last updated the order.
• The PPID of the user who placed the order.

Using this PPID, you can then call the WorldShare Identity Management API to retrieve the name and other information about the user.

Note: User data may not be available for orders created during or before 2018.

Bug fixes

Paging now works the first time on invoice page

You can now page to a different page of items on an invoice the first time even if you have made changes. Previously, if you made a change to an item on an invoice and attempted to navigate to another page of items without first saving your changes, the system would return you to the previous page. You could then navigate to the page you wanted. Now, you can navigate to another page on an invoice without saving first.

Old order items on closed budgets can be updated

You can now update all order items, including older ones. Previously, some older order items on closed budgets could not be updated. Instead, the user would receive an error that said, "Budget account "Fund Name" is not enabled for use and cannot be encumbered with [Amount]". However, the item was invoiced fully and paid for, so no encumbrance should be needed. Now, you can update these older order items.

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