

WorldShare® Acquisitions

Order monographs

Overview

- Use your vendor's website to determine availability and pricing of materials
- Optionally, use current procedures to place order on your vendor's website
- In WorldShare® Acquisitions:
 - Create a purchase order, add items to order and place order
 - Receive and invoice items, pay invoice

Discover items

- From the left panel, click **Discover Items** to find a record in the WorldCat® bibliographic database for the item you wish to order.
- Use drop-down to select **My Library Holdings** (if you already have at least one copy of the title) or **All WorldCat** (if you do not own any copies of the title).
- Use the drop-down to select Search Type: **Keyword, Title, Author, ISBN, ISSN, OCLC Number**
- Enter search terms
- Click **Search**
- Optional: Click **Advanced Search** to search more indexes and/or multiple indexes, and to qualify the search by Format, Source of Cataloging, Language, Language of Cataloging, and/or Year(s)
- If no record found in WorldCat: Refer to appropriate staff to create original record (Abbreviated Encoding Level 3 or higher) in WorldCat with WorldShare® Record Manager or Connexion®. Search for the new OCLC number in Acquisitions, **Discover Items** and follow Steps below.
- After finding a bibliographic record, click **Add to Order** across from title in the search results to display the **Add Item to Order** screen.

Add item to order

- From the **Add Item to Order** screen, select **Acquisition Type, Processing Type**, and **ISBN/ISSN** from drop-down menus
 - Acquisitions type:
 - For monographs: select **One-time**
 - For serials: select **Subscription**
 - Processing type:
 - For single-part monographs: select **Monograph**
 - For multi-part monographs and print serials: select **Serial**

- Optional: **Apply Order Template** (previously created*)
*see *Create an order item template below.*

Create new order

- From the **Add Item to Order** screen, click **New Order****
- Type an order name and select the order type **Purchase Order** from the dropdown list
- Type the vendor name. As you type the first few letters, vendors beginning with those letters will display in a drop-down list. Select the vendor.
- Click **Save**
- Click **Add** in the Action column on the row for your new purchase order to add to order
- Click **Close**

*** Alternatively, add item to an existing (open) order*

Review and edit order

- From the left panel, select **Orders**
- To find the order you want to work with, either
 - Click **Orders**
 - Use drop down menu on top to search by Order name, Order number or Vendor order number or use drop downs to filter by Vendor, Order Type, Order status, Total, or Items.
 - Click on the Order name or Order number to go to the full order.
- or
- Click **One-time items**
 - Use the filters at the top to refine your search or use the search indexes dropdown at the top. Select an index (e.g. title of an order item) Type the search terms in the text box.
 - Results in a list of titles
 - Click on a title to go to the item details, then click on the Order number on the general tab of the item details to go to the full order
- **Edit order information in any combination of three ways:**
 - Manually update data in each row
 - Use check boxes (or Select All) to apply Tax, Discount, Service Charge & Shipping
 - Click on the title to view and edit the order item details

Note: If you want the on-order item to display in WorldCat® Discovery (an option for single part monographs only), click the check box **Display in WorldCat** on the order screen or on the order item details screen (unless, while adding the item to the order, you applied a template with this box checked)

Note: If you need to edit **Acquisitions Type** or **Processing Type**, you **must** click the title and use the drop-down menus on the Order Item Details screen. For multi-part monographs, select **Serials** for **Processing Type**. For single-part monographs, select **Monograph** for **Processing Type**.

- Select / edit **Fund(s)** and **Locations**
- Select **Shipping Type** and **Shipping Address**
- Add **Notes** – you can add multiple notes to an order item from the order screen or from the item details screen.

From the order screen:

- Find the item you want to add a note to.
- In the Notes column, click the **Add Note icon** (📝). If a note has already been added to the item, click the **Add/Edit Note icon** (✎).
- If notes have already been added to the item, you will need to click Add Note on the Notes window.
- Fill in the fields:
 - In the Type field, select whether the note is a **Staff** or **Vendor** note.
 - In the Note field, enter the **note**.
 - In the Attach to field (Only applicable to order items that are Subscriptions), select whether you want the note to display on **This order item only** or **This order item and all prior and subsequent renewals**.
 - Optional. In the *Show on field, select whether the note should be displayed as a pop-up message on **payment, receiving, or receiving and payment** (*for multi-part monographs, you will only have the option to **Show on payment**).
 - Click **Save**.
 - The note will be saved along with the date, time stamp and name of user who created it. On the order screen, the Add note icon changes to a pencil and a “1” will appear. If you add more notes, this number will increment.

From the order item details screen:

- Click on the title from the order screen to go to the order item details screen
- Click on the Notes tab and then on Add note. Follow the steps as described above.

Place order or request quote

- To **Place order**, click on **Place order** at the top of the screen
 - To place the order without notifying the vendor, make sure the check box is unchecked.
 - The order is placed in the WMS Acquisitions system and funds are encumbered.
 - To place the order and notify the vendor, make sure that the check box is checked and click **Continue**.
 - Select **Method**: Email (HTML), Email (EDIFACT), or Print, and select **To** and **Reply to** options.
 - For Email (HTML) optionally check **Preview email before sending** and then click on **Continue**. Finally click on **Place and send order** (the order is placed in the WMS Acquisitions system, funds are encumbered and the order is sent via email to the vendor) or **Cancel**.
 - For Email (EDIFACT) you must configure the EDIFACT settings for the vendor under Acquisitions settings on the vendor page.
 - For Print, click on **Continue**. Finally click on **Place & Print order** (the order is placed in the WMS Acquisitions system, funds are encumbered and printer options are displayed) or **Cancel**.
- To **Request quote**, click on **Request quote** at the top of the screen
 - Select **Method**: Email (HTML), or Print, and select **To** and **Reply to** options.
 - For Email (HTML) optionally check **Preview email before sending** and then click on **Continue**. Finally click on **Send Request Quote** or **Cancel**.
 - For Print, click on **Continue**. Finally click on **Print Request Quote** or **Cancel**.

Create an order item template

- While reviewing an **Open** order, click a **title** to view the **order item details screen**
- Edit Fund, Branch, Location, Discounts, Notes etc. that you wish to save on the template
- Click **Create Template**
- Enter a Template Name and optionally, Description
- Click **Save**