WorldShare® Acquisitions:
Ordering and Renewing Serials Subscriptions

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**:
  - Import vendor order file (see **Import Vendor File* for instructions) and/or
  - Create a purchase order, add items to order and place order (this workflow below)

Create a Purchase Order

- Select **Orders** from the left navigation panel
- Click **Orders** and then click **New Order**
- Type an **Order Name**
- Open the **Order Type** drop-down and select **Purchase Order**
- 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**

Discover Items and add titles to order

- Select **Discover Items** from the left navigation panel to find a record in the WorldCat® bibliographic database.
- Use the 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 an Index: **Keyword**, **Title**, **Author**, **ISBN**, **ISSN**, **OCLC Number**
- Enter search terms
- Click **Search**
- Optional: Click **Advanced Search** to search more indexes or multiple indexes, and to limit the search by Format, Source of Cataloging, Language, Language of Cataloging, and/or Year(s)

*(If no record is found in WorldCat®, refer to appropriate staff to create an original record (Abbreviated Encoding Level 3 or higher) in WorldCat® with **WorldShare® Record Manager** or **Connexion®.** Then go back to **Acquisitions**, search for the new OCLC number in **Discover Items, and** follow Steps below).*

- Click the **Add to** dropdown across from title in search results and select **Order**
- Select Acquisitions Type, Processing Type, and ISBN/ISSN from drop-down menus
  - **Acquisitions type:**
    - For serials: select **Subscription**
  - **Processing type:**
    - For print serials: select **Serial**
- Enter **Subscription start date.** Adjust subscription period as needed.
- Optional: Apply an **Order Template**
- Click **Add** in the Action column on the row with your order to add to order
- Click **Close**
- To add more titles to order, repeat steps above.

Review, edit and place order

- Select **Orders** from the left navigation panel
- To find the order you want to work with, either
  - Click **Orders**
  - Use the drop down menu on top to search by Order Name, Order Number or Vendor Order Number; enter search term(s) in box; click **Search**
  - Use the drop down filter **Order Type** to select a specific Order type (e.g. Purchase order)
  - Use the drop down filter **Status** to select a specific status (e.g. Open)
  - This will result in a list of orders
  - Click on the **Order name** or **Order number** in the results list 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 top box to Select All items) to apply Tax, Discount, Service Charge & Shipping
  - Click on the title to view and edit the order item details (including subscription periods)

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.

- 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 **Show on** field, select whether the note should be displayed as a pop-up message on **payment**.
    - Click **Save**.
    - The note will be saved along with the date and 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 **Request quote,** click **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.**
- To **Place order**, click **Place order**
    - To place the order without notifying the vendor, make sure the check box is unchecked.
        - The order is placed in the 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, optionally check **Preview email before sending** and then click **Continue.** Finally click **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 Print, click **Continue**. Finally click **Place & Print Order** (the order is placed in the WMS Acquisitions system, funds are encumbered and printer options are displayed) or **Cancel.**

Create an order item template (optional)

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

Renew subscriptions

- Select **Orders** from the left navigation panel
- Click **Subscription Items**
- **Search** for a title to renew using the dropdown indexes
  Or
- Filter to find titles to renew (must click **Apply** after selecting filter)
    - **Order status:** Ordered
    - **Processing type:** Serials
    - **Order type:** Purchase order
    - **End date:** <e.g. within 90 to find subscriptions that expire in the next 90 days>
    - **Renewal status**: Not renewed
    - **Vendor**: <name of your subscription vendor>
- Select box at top to renew all. Or to renew selected titles, click in the checkbox next to the title
- Click **Renew**
- Optionally, select a percent increase and click **Continue**
- Choose budget period
- Add to an existing open order or create a new order and click **Save**
- Click **Place order**