Submit requests to WorldShare Acquisitions

Learn how to submit and complete Tipasa requests for purchase to WorldShare Acquisitions. The WMS Acquisitions option allows you to submit requests to WorldShare Acquisitions for items you may wish to purchase, instead of borrowing via interlibrary loan and tracks usage in OCLC Usage Statistics.

Submit items for purchase to WorldShare Acquisitions:

1. Review requests to submit to WorldShare Acquisitions. Patron initiated requests can appear in the Borrowing Requests > New for Review queue or, if the request matched an automation, the Purchasing Requests > Review for Purchase queue. See Automated Request Manager for more information about automations.

   Display requests from the New for Review queue:
   1. On the left navigation, click Borrowing Requests.
   2. Click New for Review.
   3. On the New for Review screen, click the request ID or Title to display the request.

   Display requests from Review for Purchase:
   1. On the left navigation, click Purchasing Requests.
   2. Click Review for Purchase.
   3. On the Review for Purchase screen, click the request ID or Title to display the request.

2. From the request screen, click the Change Fulfillment Type button at the top of the request and select WMS Acquisitions.

   ![Change Fulfillment Type](image)

3. A confirmation box appears affirming the information to be sent to WorldShare Acquisitions. Note: Requests must have an OCLC number and be linked to a Patron Account.

4. Optional. Enter Purchase Notes to include relevant information to be relayed to the acquisitions staff.
5. Click Submit.

6. A confirmation message appears confirming the request has moved to the Purchasing Requests > On Order queue.

The Supplier History under the Request History section will confirm the date and time the order was submitted to WMS Acquisitions.

```
+-----------------+-----------------+-----------------+-----------------+
| Date            | Supplier        | Response        | Reference Id    |
| 2018-05-25 13:26:17 | Submitted to WMS Acquisitions | WMSACQ#d4d5507f-de00-4107-9984-1e6e4c998f11 |
+-----------------+-----------------+-----------------+-----------------+
```

The Request Details will update with the Ordered Date, Reference ID, and any added Purchase Notes. Depending on the Acquisitions roles associated with your account, you can click on the Reference ID and be taken to the corresponding Purchase Request in WorldShare Acquisitions.

```
Request Details (Request ID 167167100)
Source: PATRON
Status: Received

- Fulfillment Type: WMS Acquisitions
- Ordered Date: 05/25/2018
- Reference ID: WMSACQ#d4d5507f-de00-4107-9984-1e6e4c998f11
- Purchase Notes:
```

Create an automation to route items directly to WorldShare Acquisitions

To route patron initiated purchasing requests directly to WorldShare Acquisitions, create an automation. See Automated Request Manager for more information.

To add an automation:

1. Click + Add New.
2. Enter a Name and assign a Priority. See Main Automation fields for more information.
3. Select any desired match criteria from the Matches drop-down menu. See Automation Match criteria for more information.
   - If you do not select a match criteria, the automation will apply to all requests.
   - Click the Add a match button to configure additional match criteria.
4. From the Action drop-down, select Route Request to WMS Acquisitions.
5. Click Save.

For requests that automatically route to WorldShare Acquisitions, the Request History will include information about the
automation match and indicate that the request was submitted to Acquisitions. The Interlibrary Loan request moves on to the On Order queue within Purchasing Requests.

WorldShare Acquisitions workflow considerations

Requests submitted to WorldShare Acquisitions will appear in the Purchase Requests > Pending Requests queue. Please see Purchase requests for more information about the workflow in WorldShare Acquisitions.

The information migrated from Tipasa will appear on the item detail screen, including the Tipasa request ID in the Request Source field. Any Purchase Notes entered by Tipasa staff will appear in the Notes tab of the item detail. Acquisitions staff can add additional staff notes to the item detail as well.

If the Place Patron Hold option is checked, a hold will be placed for the patron in Circulation once the item is received. Please see View and edit a purchase request for additional information.
Complete requests in Tipasa

Once the purchase request has been determined to be rejected or approved, the Acquisitions staff will communicate the result with the Tipasa staff.

Note: Actions taken in WorldShare Acquisitions will not automatically update the purchase request in Tipasa.

- If the purchase request is approved and the item is received, Tipasa staff will need to manually Mark the request as received in the Tipasa interface.
  - **Loan requests:** If you have the Loan available for pickup notification configured, the user will be notified that the item is ready for pickup. Please see Notification Types for more information.
    - My Account will update the request to Received by library.
    - If the Purchase Request included the Place Patron Hold option, the patron may receive notices from WorldShare Circulation when the requested item is ready for their use.
  - **Copy/Electronic requests:** Add the URL Type and URL to the request prior to marking the item as received.
    - If the request is fulfilled by an item from the Knowledge Base, select KB Link from the URL Type dropdown and enter the URL from the Knowledge Base prior to marking the request as Received.
    - My Account will update to Available to view and will link to the requested item.

- If the purchase request is rejected, change the Fulfillment Type of the request in Tipasa to an ILL request, a manual purchase request, or cancel the request as is appropriate.

Usage Reports

Requests sent to WorldShare Acquisitions are included in the below WorldShare Interlibrary Loan reports:

- Borrower Activity Overview Report
- WorldShare ILL Purchase Request Report

Please see WorldShare Interlibrary Loan reports for more information.