Add local resources to an order or purchase request

Discover how to add new or existing local resources to an order or purchase request in WorldShare Acquisitions. Note: Only active local resources can be added to an order or purchase request.

Add an existing local resource to an order

1. Navigate to Local Resources > Local Resources and select Order from the Add to drop-down menu in the Action column.
   Or
   Navigate to Local Resources > Local Resources, click the name of the local resource you want to add to an order or purchase request, and then click Add to Order.
2. On the Add Item to Order window, adjust the Acquisition Type setting as needed.
   ◦ One-Time (default) - A local resource that is received in a single transaction.
   ◦ Subscription - A local resource that is received on a continual basis.
3. (Optional) Apply a template (available for orders only). From the Apply Order Template drop-down list, click the template you want to apply.
4. From the Existing Orders table, click Add in the Action column to add the local resource to an order. The number in the Items column increases.
5. Click Close.

Add an existing local resource to a purchase request

1. Navigate to Local Resources > Local Resources and select Purchase Request from the Add to drop-down menu in the Action column.
   Or
   Navigate to Local Resources > Local Resources, click the name of the local resource you want to add to an order or purchase request, and then click Add to Purchase Request.
2. On the New Purchase Request window, change the settings as needed - Table

<table>
<thead>
<tr>
<th>FIELD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquisition Type (required)</td>
<td>Select a local resource type from the drop-down list.</td>
</tr>
<tr>
<td>◦ One-Time (default) - A local resource that is received in a single transaction</td>
<td></td>
</tr>
<tr>
<td>◦ Subscription - A local resource that is received on a continual basis</td>
<td></td>
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<tr>
<td>FIELD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Requestor</td>
<td>Enter the name of the person who requested the item. Note: This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field. Auto-suggestions include an email address for the user which is pulled from Delivery Notification of the WorldShare Admin module. If no email exists in the Delivery Notification section, the Library Record email address will be used.</td>
</tr>
<tr>
<td>Date Needed</td>
<td>Enter the date by which the item is needed. Note: Enter the date in the format specific to your language (e.g., MM/DD/YYYY for American English) or use the calendar button ().</td>
</tr>
<tr>
<td>Reviewer</td>
<td>Enter the name of the person who will review the purchase request. Note: This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field. Auto-suggestions include an email address for the user which is pulled from Delivery Notification of the WorldShare Admin module. If no email exists in the Delivery Notification section, the Library Record email address will be used.</td>
</tr>
<tr>
<td>Notes</td>
<td>Enter any notes about the purchase request.</td>
</tr>
</tbody>
</table>

3. From the New Purchase Request window, adjust the Acquisition Type setting as needed.
   - One-Time (default) - A local resource that is received in a single transaction.
   - Subscription - A local resource that is received on a continual basis.

4. Click Save.

Add a new local resource to an order

1. Create a new local resource and click Save.
2. Click Add to Order.
3. On the Add Item to Order window, adjust the Acquisition Type setting as needed.
   - One-Time (default) - A local resource that is received in a single transaction.
   - Subscription - A local resource that is received on a continual basis.
4. **(Optional)** Apply a template (available for orders only). From the Apply Order Template drop-down list, click the template you want to apply.

5. From the Existing Orders table, click Add in the Action column to add the local resource to an order. The number in the Items column increases.

6. Click Close.

## Add a new local resource to a purchase request

1. Create a new local resource and click Save.

2. Click Add to Purchase Request.

3. **On the New Purchase Request window, change the settings as needed** - Table

<table>
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</tr>
</thead>
</table>
| Acquisition Type **(required)** | Select a local resource type from the drop-down list.  
  - **One-Time** *(default)* - A local resource that is received in a single transaction  
  - **Subscription** - A local resource that is received on a continual basis |
| Requestor                  | Enter the name of the person who requested the item.  
  Note: This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field. Auto-suggestions include an email address for the user which is pulled from Delivery Notification of the WorldShare Admin module. If no email exists in the Delivery Notification section, the Library Record email address will be used. |
| Date Needed                | Enter the date by which the item is needed.  
  Note: Enter the date in the format specific to your language (e.g., MM/DD/YYYY for American English) or use the calendar button. |
| Reviewer                   | Enter the name of the person who will review the purchase request.  
  Note: This is an auto-suggest text field. Auto-suggestions for field-appropriate elements start with the first keystroke in the text field. Auto-suggestions include an email address for the user which is pulled from Delivery Notification of the WorldShare Admin module. |
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4. From the New Purchase Request window, adjust the Acquisition Type setting as needed.
   - **One-Time (default)** - A local resource that is received in a single transaction.
   - **Subscription** - A local resource that is received on a continual basis.

5. Click **Save**.