Acquisitions rollout plan

☐ Provide staff with accounts and acquisitions roles.

☐ Review Acquisitions tutorials to gain a basic understanding of how to complete particular tasks in Acquisitions. Please view these prior to your Acquisitions cohort session.

☐ Create a training plan for your staff utilizing the 1-2 hour instructor-led sessions.
  - Utilize the tutorials to determine where staff need more in-depth knowledge to meet your acquisitions goals.

☐ Attend Acquisitions training, which provides a baseline understanding of how the system works.

☐ Attend Acquisitions cohort session.
  - The cohort session helps you decide whether to use WorldShare Acquisitions to add items to your collection and, if so, how it will be different from your current Acquisitions workflows.

☐ Set up your Budget.
  - Review your current budget and determine the fund structure that you want to use with WMS.
  - Determine at which point your will transition (e.g., start of the fiscal year).

☐ Set up Vendors.
  - Select your vendors.
  - Add local contacts and account information.

☐ Work with Electronic Resources staff on ordering/selection process for electronic orders.
  - Selecting e-resources in Collection Manager makes the link available to end users. You should plan out how this workflow will relate to the Acquisitions process, which encumbers and expends funds for those resources.

☐ Review WorldShare Acquisitions release notes which contain administrative actions that libraries may need to activate new functionality.

☐ Talk to vendors about order, shelf-ready, and/or invoice data delivery (Optional).
  - If you receive order, shelf-ready, or invoice data from vendors, you will need to work with them to plan the transition to OCLC's specifications for vendor data.

☐ Configure settings for EDIFACT for orders (Optional).

☐ Work with Circulation staff to determine "In Processing" status for location policies (Optional).
  - In processing status can be determined by shelving location (e.g., Items in the general stacks need a processing period of seven days, Upon receipt, items will show as in processing until they are checked in, etc.).
• Caution: Do not configure location policies before your Implementation Manager informs you that your data
migration is complete.

☐ Discuss options for tracking and processing print serials with staff.
  • Consider how they will appear to patrons and what internal processes are needed to manage print serials.

☐ Discuss using download MARC and EDIFACT data or how processing can be automated.

☐ Join the discussion in the Acquisitions Community Center.
  • Subscribe to the Acquisitions discussion and news pages in the OCLC Community Center to receive critical
systems alerts, to be notified of new releases, and to exchange best practices with your peers.

☐ Create Order Item templates.
  • Create templates to specify elements such as locations, fund, discounts/taxes/fees, and whether to display as
"On Order" to end users. Use templates to streamline order creation.