Find the WorldShare Acquisitions authorization roles available in the Admin module and compare the actions available for each role.

**Roles**

- Acquisitions Admin
- Acquisitions Budget Manager
- Acquisitions Budget Staff
- Acquisitions Cataloging Staff
- Acquisitions Exchange Rates Manager
- Acquisitions Order Staff
- Acquisitions Read Only User
- Acquisitions Receive Staff
- Acquisitions Reports Viewer
- Acquisitions Request Creator
- Acquisitions Request Manager
- Acquisitions Request Reviewer
- Acquisitions Senior Order Staff
- Acquisitions Senior Staff
- Acquisitions Settings Staff
- Serials Admin
- Serials Binding Staff
- Serials Claim
- Serials Receive
- Vendor Administrator
- Vendor Manager

**Acquisitions role comparison by action**
## Analytics

Note: See [Reports and Report Designer roles](https://help.oclc.org/WorldShare/WorldShare_Admin/Roles/Roles_Acquisitions) for a list of available standard reports and associated roles.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS REPORTS VIEWER</th>
<th>ACQUISITIONS SENIOR STAFF</th>
<th>SERIALS ADMIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Acquisitions reports from the Analytics module.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>View content in the Analytics module, including Reports available via My Files.</td>
<td></td>
<td>x</td>
<td>x</td>
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</table>

## Budgets

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS BUDGET MANAGER</th>
<th>ACQUISITIONS BUDGET STAFF</th>
<th>ACQUISITIONS CATALOGING STAFF</th>
<th>ACQUISITIONS ORDER STAFF</th>
<th>ACQUISITIONS READ ONLY USER</th>
<th>ACQUISITIONS RECEIVE STAFF</th>
<th>ACQUISITIONS SENIOR ORDER STAFF</th>
<th>ACQUISITIONS SENIOR STAFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allocate (or distribute) money into funds associated with a budget. This changes the budgeted amount of the fund. User is also able to dis-allocate (or distribute) funds back to the budget.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<td>x</td>
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<td>ACTION</td>
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<tr>
<td>remove) money from the fund.</td>
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<tr>
<td>Close the budget for the current fiscal cycle, including transferring any open encumbrances to the next fiscal cycle.</td>
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<tr>
<td>Copy the fund structure from a previous budget to a new budget, so that they do not have to re-enter all the fund details into the new</td>
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<td>ACTION</td>
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<td>ACQUISITIONS CATALOGING STAFF</td>
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<td>ACQUISITIONS READ ONLY USER</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
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<tr>
<td>budget.</td>
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<td>x</td>
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<tr>
<td>Create a budget for a future time period.</td>
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<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Create a fund for a budget.</td>
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<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Delete a fund from a budget, assuming the fund does not have any open transactions (encumbrances, expenditures, etc.).</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Edit or update a fund within a budget, including fund name, fund code, and budgeted</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
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<td>ACQUISITIONS BUDGET STAFF</td>
<td>ACQUISITIONS CATALOGING STAFF</td>
<td>ACQUISITIONS ORDER STAFF</td>
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<td>ACQUISITIONS RECEIVE STAFF</td>
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<td>Enable the</td>
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<td>ACTION</td>
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<td>ACQUISITIONS BUDGET MANAGER</td>
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<td>ACQUISITIONS CATALOGING STAFF</td>
<td>ACQUISITIONS ORDER STAFF</td>
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<td>ACQUISITIONS RECEIVE STAFF</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
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<tr>
<td>next budget for use even though the current budget (aka earliest open budget) is still being used so that a library can order materials on the next budget.</td>
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<tr>
<td>Modify the end date of an open (current or future) budget to adjust for changing fiscal cycles and budget periods or</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Discover Collections ACTION</td>
<td>ACQUISITIONS ADMIN</td>
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<td>ACQUISITIONS CATALOGING STAFF</td>
<td>ACQUISITIONS ORDER STAFF</td>
<td>ACQUISITIONS READ ONLY USER</td>
<td>ACQUISITIONS REQUEST CREATOR</td>
<td>ACQUISITIONS REQUEST MANAGER</td>
<td>ACQUISITIONS REQUEST REVIEWER</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
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<tr>
<td>make simple corrections to the time period of a budget.</td>
<td>make simple corrections to the time period of a budget.</td>
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<td>make simple corrections to the time period of a budget.</td>
<td>make simple corrections to the time period of a budget.</td>
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<td>make simple corrections to the time period of a budget.</td>
<td>make simple corrections to the time period of a budget.</td>
<td>make simple corrections to the time period of a budget.</td>
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<tr>
<td>Update a budget, shortening or extending the end date.</td>
<td>Update a budget, shortening or extending the end date.</td>
<td>Update a budget, shortening or extending the end date.</td>
<td>Update a budget, shortening or extending the end date.</td>
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<td>Update a budget, shortening or extending the end date.</td>
<td>Update a budget, shortening or extending the end date.</td>
<td>Update a budget, shortening or extending the end date.</td>
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<tr>
<td>View a budget, including its start and end dates.</td>
<td>View a budget, including its start and end dates.</td>
<td>View a budget, including its start and end dates.</td>
<td>View a budget, including its start and end dates.</td>
<td>View a budget, including its start and end dates.</td>
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<td>View a budget, including its start and end dates.</td>
<td>View a budget, including its start and end dates.</td>
</tr>
<tr>
<td>View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.</td>
<td>View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.</td>
<td>View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.</td>
<td>View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.</td>
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</table>
Invoices
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS READ ONLY USER</th>
<th>ACQUISITIONS RECEIVE STAFF</th>
<th>ACQUISITIONS SENIOR ORDER STAFF</th>
<th>ACQUISITIONS SENIOR STAFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add an item to an invoice after that item has already been added to a previous invoice, so that the library can process and pay supplemental invoices received to cover adjusted costs for items.</td>
<td>x</td>
<td></td>
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<td>x</td>
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<tr>
<td>Add items to an invoice.</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>Change an invoice before it's paid.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Change items on an invoice before it's paid.</td>
<td>x</td>
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<td>x</td>
</tr>
<tr>
<td>Create an invoice.</td>
<td>x</td>
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</tr>
<tr>
<td>Delete an invoice.</td>
<td>x</td>
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<tr>
<td>Delete an item from an open (unpaid) invoice.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Revert an invoice to unpaid state in order to correct</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
<td>SERIALS ADMIN</td>
<td>SERIALS RECEIVE</td>
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<tr>
<td>Can print labels.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>(This feature is not allowed for invoices that use a closed budget).</td>
<td></td>
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<tr>
<td>Search invoices.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
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<tr>
<td>View an invoice, including the vendor, invoice number, etc.</td>
<td>x</td>
<td>x</td>
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<td>x</td>
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<tr>
<td>View items on an invoice.</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS CATALOGING STAFF</td>
<td>ACQUISITIONS READ ONLY USER</td>
<td>ACQUISITIONS ORDER STAFF</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
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<tr>
<td>Add items to an order.</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Cancel order items, so that they can no longer be received.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Change items on an order, before it has been placed.</td>
<td>x</td>
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<tr>
<td>Change the link from</td>
<td>x</td>
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<tr>
<td>Action Description</td>
<td>Column 1</td>
<td>Column 2</td>
<td>Column 3</td>
<td>Column 4</td>
<td>Column 5</td>
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</tr>
<tr>
<td>an item on order to the WorldCat record, in case the wrong WorldCat record or item was selected in &quot;Discover Items.&quot;</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Change the resource for order items.</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
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<tr>
<td>Create a purchase order.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Delete an item from an open (unplaced) purchase order, in case an order item was added by mistake</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Action</td>
<td>Acquisitions</td>
<td>Cataloging</td>
<td>Acquisitions</td>
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<tr>
<td>or is no longer needed.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Delete an order item template (in case it is no longer valid for your library).</td>
<td></td>
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<tr>
<td>Delete an unplaced purchase order and all its items, so that if the purchase order is no longer valid, it can be removed from the system.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
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<tr>
<td>Order a purchase request.</td>
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<tr>
<td>Perform item operations,</td>
<td>x</td>
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<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
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<td>ACQUISITIONS REQUEST CREATOR</td>
<td>ACQUISITIONS REQUEST MANAGER</td>
<td>ACQUISITIONS REQUEST REVIEWER</td>
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<td>Renew</td>
<td>x</td>
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<tr>
<td>Approve items or reject</td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Search and request</td>
<td>x</td>
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<td>X</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Search items ordered</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Select and claim unreceived items and send a message to the vendor</td>
<td>x</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

https://help.oclc.org/WorldShare/WorldShare_Admin/Roles/Roles_Acquisitions
Printed: Fri, 26 Aug 2022 09:38:37 GMT
Receiving
<table>
<thead>
<tr>
<th>ACTION</th>
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<th>ACQUISITIONS RECEIVE STAFF</th>
<th>ACQUISITIONS REQUEST MANAGER</th>
<th>ACQUISITIONS REQUEST REVIEWER</th>
<th>ACQUISITIONS SENIOR ORDER STAFF</th>
<th>ACQUISITIONS SENIOR STAFF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve or reject a purchase request.</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Finish receiving a serial order so that it is marked as completely received by the library.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Finish receiving an e-product order so that it is marked as completely received by the library.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive outstanding monographs that have been ordered, but not yet received.</td>
<td>x</td>
<td>x</td>
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<td></td>
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<tr>
<td>Start</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

https://help.oclc.org/WorldShare/WorldShare_Admin/Roles/Roles_Acquisitions
Printed: Fri, 26 Aug 2022 09:38:37 GMT
receiving an e-product, so that the library can record the receipt of content on an incomplete order.

<table>
<thead>
<tr>
<th>Start receiving serial issues, so that the library can record their receipt on an incomplete order.</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>SERIALS ADMIN</td>
<td>SERIALS BINDING STAFF</td>
<td>SERIALS CLAIM</td>
<td>SERIALS RECEIVE</td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>---------------</td>
<td>-----------------------</td>
<td>---------------</td>
<td>-----------------</td>
<td></td>
</tr>
<tr>
<td>Add issues to a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allows the user to delete an issue in Manage Issues from the list of issues if the issue has not been used for receiving, claiming, or start/stop receiving.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can select one or more issues from the &quot;missing issues&quot; list and claim them, optionally sending a notification to the Vendor.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complete binding of a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create a binding unit.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create new serial issues for a title. New issues are shared with all libraries.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create, edit, and delete copy and item-level holdings for your institution in WorldCat.</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Delete a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recall a binding unit from the bindery.</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive issue for your library.</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send a binding unit to the bindery.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update serial issues for a title. Issue updates are shared with all libraries.</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View a binding unit.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View all product reports.</td>
<td></td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View copy and item-level holdings for their institution in WorldCat.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View My Library and export data.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View serial issues for a title.</td>
<td>X</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS EXCHANGE RATES MANAGER</td>
<td>ACQUISITIONS ORDER STAFF</td>
<td>ACQUISITIONS READ ONLY USER</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------</td>
<td>-----------------------------------</td>
<td>-------------------------</td>
<td>---------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Access your institution's holdings.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Configure HTTP order notifications.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create, edit and delete copy and item-level holdings for their</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/WorldShare/WorldShare_Admin/Roles/Roles_Acquisitions
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<table>
<thead>
<tr>
<th>Task</th>
<th>User A</th>
<th>User B</th>
<th>User C</th>
<th>User D</th>
<th>User E</th>
<th>User F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete users.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Download and read files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Modify the library's Exchange Rates</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perform item operations, like adding and editing items.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Action</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read information about self via WorldCat Local/Discovery.</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read information about users, regardless of module (Circ, Acq, etc.).</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retrieve and view users.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The security context contains all the information about a given user (especially what actions they can perform). This permission allows the user to perform actions on</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update information about other users, regardless of module (Circ, Acq, etc.)</td>
<td>X</td>
</tr>
<tr>
<td>Update institution configuration information relating to authentication and authorization</td>
<td>X</td>
</tr>
<tr>
<td>Upload a file and store it on the Shared File Service</td>
<td>X</td>
</tr>
<tr>
<td>Use the Forgot</td>
<td>X</td>
</tr>
<tr>
<td>Feature</td>
<td>Access 1</td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Password feature to get a new password</td>
<td>x</td>
</tr>
<tr>
<td>View all product reports</td>
<td>x</td>
</tr>
<tr>
<td>View copy and item-level holdings for their institution in WorldCat.</td>
<td>x</td>
</tr>
<tr>
<td>View information about a user's accounts. In some circumstances this</td>
<td>x</td>
</tr>
<tr>
<td>may include identifying information about accounts external to OCLC</td>
<td>x</td>
</tr>
<tr>
<td>(e.g. where OCLC receives periodic patron updates)</td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>Role 1</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>View the library's Exchange Rates</td>
<td>x</td>
</tr>
<tr>
<td>View My Library and export data</td>
<td>x</td>
</tr>
<tr>
<td>View the name and other metadata of files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services.</td>
<td>x</td>
</tr>
<tr>
<td>It does not allow users to read the file.</td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
</tr>
<tr>
<td>--------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Activate a vendor for use within both Acquisitions and Licenses.</td>
<td></td>
</tr>
<tr>
<td>Can select one or more issues from the &quot;missing issues&quot; list and claim them, optionally sending a notification to the Vendor.</td>
<td></td>
</tr>
<tr>
<td>Change a vendor order number, order name, and order comments on a placed purchase order, i.e.</td>
<td>x x</td>
</tr>
<tr>
<td>Action</td>
<td>Role 1</td>
</tr>
<tr>
<td>-----------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>one that has been submitted to the vendor.</td>
<td></td>
</tr>
<tr>
<td>Create a vendor.</td>
<td></td>
</tr>
<tr>
<td>Create, edit and delete files in the shared files service as part of a corresponding process, such as uploading of files from a vendor for import into Acquisitions.</td>
<td></td>
</tr>
<tr>
<td>Edit public vendors (indicated by a globe icon) and the public data for this</td>
<td>x</td>
</tr>
<tr>
<td>Vendor, including name, country, etc.</td>
<td></td>
</tr>
<tr>
<td>Edit vendor data for your library only.</td>
<td>x</td>
</tr>
<tr>
<td>Find a vendor.</td>
<td>x</td>
</tr>
<tr>
<td>Pay an invoice, so that the vendor can receive payment for items ordered and the library can track the invoice amount as expended, rather than encumbered.</td>
<td></td>
</tr>
<tr>
<td>Place an order, submitting it to the vendor.</td>
<td>x</td>
</tr>
<tr>
<td>Task</td>
<td>Column 1</td>
</tr>
<tr>
<td>---------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>if not done already.</td>
<td></td>
</tr>
<tr>
<td>Publish a vendor to all libraries.</td>
<td>x</td>
</tr>
<tr>
<td>Remove a vendor from your list of active partners (in Acquisitions or License Manager).</td>
<td></td>
</tr>
<tr>
<td>Request a price quote from a vendor for a group of items on an order.</td>
<td>x</td>
</tr>
<tr>
<td>Select and claim unreceived items and send a message to the vendor.</td>
<td>x</td>
</tr>
<tr>
<td>Upload MARC</td>
<td>x</td>
</tr>
</tbody>
</table>
## Acquisitions roles and associated actions

### Acquisitions Admin

- **Analytics**
  - View Acquisitions reports from the Analytics module.
  - View content in the Analytics module, including Reports available via My Files.

- **Discover Collections**
  - Search for and view collections and titles in the WorldCat KnowledgeBase.

### Budgets

- Allocate (or distribute) money into funds associated with a budget. This changes the budgeted amount of the fund. User is also able to dis-allocate (or remove) money from the fund.
- Close the budget for the current fiscal cycle, including transferring any open encumbrances to the next fiscal cycle.
- Copy the fund structure from a previous budget to a new budget, so that they do not have to re-enter all the fund details into the new budget.
- Create a budget for a future time period.
- Create a fund for a budget.
- Delete a fund from a budget, assuming the fund does not have any open transactions (encumbrances, expenditures, etc.).
- Edit or update a fund within a budget, including fund name, fund code, and budgeted amount. It also allows editing the start date, end date, and cycle, and enabling a future budget for use. Note: The availability of these actions depends on whether a budget is open or closed, enabled or not, and the presence or absence of future budgets.
- Enable the next budget for use even though the current budget (aka earliest open budget) is still being used so that a library can order materials on the next budget.
- Modify the end date of an open (current or future) budget to adjust for changing fiscal cycles and budget periods or make simple corrections to the time period of a budget.
- Update a budget, shortening or extending the end date.
- View a budget, including its start and end dates.
- View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

### Discover Collections

- Search for and view collections and titles in the WorldCat KnowledgeBase.

### Invoices

- Add an item to an invoice after that item has already been added to a previous invoice, so that the library can process and pay supplemental invoices received to cover adjusted costs for items.
- Add items to an invoice.
• Change an invoice before it's paid.
• Change items on an invoice before it's paid.
• Create an invoice.
• Delete an invoice.
• Delete an item from an open (unpaid) invoice.
• Revert an invoice to an un-paid state in order to correct mistakes and thus alter the corresponding budget expenditures (This feature is not allowed for invoices that use a closed budget).
• Search invoices.
• View an invoice, including the vendor, invoice number, etc.
• View items on an invoice.

My Labels
• Can print labels.

Orders
• Add items to an order.
• Cancel order items, so that they can no longer be received.
• Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.
• Change items on an order, before it has been placed.
• Change the link from an item on order to the WorldCat record, in case the wrong WorldCat record or item was selected in “Discover Items.”
• Create a purchase order.
• Delete an item from an open (unplaced) purchase order, in case an order item was added by mistake or is no longer needed.
• Delete an order item template (in case it is no longer valid for your library).
• Delete an un-placed purchase order and all its items, so that if the purchase order is no longer valid, it can be removed from the system.
• Perform item operations, like adding and editing items.
• Renew order items.
• Search and view open orders that have not yet been placed with the vendor.
• Search and view order items.
• Search items ordered.
• Select and claim unreceived items and send a message to the vendor.

Receiving
• Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.
• Finish receiving a serial order so that it is marked as completely received by the library.
• Finish receiving an e-product order so that it is marked as completely received by the library.
• Receive outstanding monographs that have been ordered, but not yet received.
• Start receiving an eProduct, so that the library can record the receipt of content on an incomplete order.
• Start receiving serial issues, so that the library can record their receipt on an incomplete order.

Settings

• Access your institution's holdings.
• Assign roles to other users. Create a user that automatically has the Everyone role assigned.
• Configure HTTP order notifications.
• Create, edit and delete copy and item-level holdings for their institution in WorldCat.
• Delete users.
• Download and read files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services.
• Modify the library's Exchange Rates.
• Perform all operations, including assigning roles to users.
• Perform item operations, like adding and editing items.
• Read information about users, regardless of module (Circ, Acq, etc.).
• Retrieve and view users.
• Update information about other users, regardless of module (Circ, Acq, etc.).
• Update information about self via WorldCat Local/Discovery.
• Update institution configuration information relating to authentication and authorization.
• Upload a file and store it on the Shared File Service.
• Use the Forgot Password feature to get a new password.
• View all product reports.
• View copy and item-level holdings for their institution in WorldCat.
• View information about a user’s accounts. In some circumstances this may include identifying information about accounts external to OCLC (e.g. where OCLC receives periodic patron updates from an external system, or where authentication is managed by an external system).
• View the library's Exchange Rates.
• View My Library and export data.
• View the name and other metadata of files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services. It does not allow users to read the file.

Vendors

• Change a vendor order number, order name, and order comments on a placed purchase order, i.e. one that has been submitted to the vendor.
• Create, edit, and delete files in the shared files service as part of a corresponding process, such as uploading of files from a vendor for import into Acquisitions.
• Edit public vendors (indicated by globe icon) and the public data for this Vendor, including name, country, etc.
• Edit vendor data for your library only.
• Find a vendor.
• Pay an invoice, so that the vendor can receive payment for items ordered and the library can track the invoice amount as expended, rather than encumbered.
• Place an order, submitting it to the vendor, if not done already.
• Publish a vendor to all libraries.
• Request a price quote from a vendor for a group of items on an order.
• Select and claim unreceived items and send a message to the vendor.
• Upload MARC files from a vendor to be imported into Acquisitions.
• View a vendor.
• View the logs of a vendor import/export process, such as the process that begins when uploading a file to one of the Partner Exchange Services.
• View My Library and export data.

Acquisitions Budget Manager

Budgets

• Allocate (or distribute) money into funds associated with a budget. This changes the budgeted amount of the fund. User is also able to dis-allocate (or remove) money from the fund.
• Close the budget for the current fiscal cycle, including transferring any open encumbrances to the next fiscal cycle.
• Copy the fund structure from a previous budget to a new budget, so that they do not have to re-enter all the fund details into the new budget.
• Create a budget for a future time period.
• Create a fund for a budget.
• Delete a fund from a budget, assuming the fund does not have any open transactions (encumbrances, expenditures, etc.).
• Edit or update a fund within a budget, including fund name, fund code, and budgeted amount. It also allows editing the start date, end date, and cycle, and enabling a future budget for use. Note: The availability of these actions depends on whether a budget is open or closed, enabled or not, and the presence or absence of future budgets.
• Enable the next budget for use even though the current budget (aka earliest open budget) is still being used so that a library can order materials on the next budget.
• Modify the end date of an open (current or future) budget to adjust for changing fiscal cycles and budget periods or make simple corrections to the time period of a budget.
• Update a budget, shortening or extending the end date.
• View a budget, including its start and end dates.
• View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

Acquisitions Budget Staff

Budgets

• Allocate (or distribute) money into funds associated with a budget. This changes the budgeted amount of the fund. User is also able to dis-allocate (or remove) money from the fund.
• Copy the fund structure from a previous budget to a new budget, so that they do not have to re-enter all the fund details into the new budget.
• Create a budget for a future time period.
• Create a fund for a budget.
• Delete a fund from a budget, assuming the fund does not have any open transactions (encumbrances, expenditures, etc.).
• Edit or update a fund within a budget, including fund name, fund code, and budgeted amount. It also allows editing the start date, end date, and cycle, and enabling a future budget for use. Note: The availability of these actions depends on whether a budget is open or closed, enabled or not, and the presence or absence of future budgets.
• Enable the next budget for use even though the current budget (aka earliest open budget) is still being used so that a library can order materials on the next budget.
• Modify the end date of an open (current or future) budget to adjust for changing fiscal cycles and budget periods or make simple corrections to the time period of a budget.
• Update a budget, shortening or extending the end date.
• View a budget, including its start and end dates.
• View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

**Acquisitions Cataloging Staff**

**Budgets**

• View a budget, including its start and end dates.
• View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

**Discover Collections**

• Search for and view collections and titles in the WorldCat KnowledgeBase.

**Orders**

• Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.
• Change the resource for order items.

**Vendors**

• Change a vendor order number, order name, and order comments on a placed purchase order, i.e. one that has been submitted to the vendor.
• Search a vendor.
• View a vendor.

**Acquisitions Exchange Rates Manager**

**Settings**

• Modify the library's Exchange Rates.
• View the library's Exchange Rates.
Acquisitions Order Staff

Budgets

- View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

Discover Collections

- Search for and view collections and titles in the WorldCat KnowledgeBase.

Orders

- Add items to an order.
- Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.
- Change items on an order, before it has been placed.
- Create a purchase order.
- Delete an item from an open (unplaced) purchase order, in case an order item was added by mistake or is no longer needed.
- Delete an order item template (in case it is no longer valid for your library).
- Delete an un-placed purchase order and all its items, so that if the purchase order is no longer valid, it can be removed from the system.
- Order a purchase request.
- Perform item operations, like adding and editing items.
- Renew order items.
- Search and view open orders that have not yet been placed with the vendor.
- Search and view order items.
- Search items ordered.
- Select and claim unreceived items and send a message to the vendor.

Purchase requests

- Approve or reject a purchase request.
- Create a purchase request.

Settings

- Create, edit and delete copy and item-level holdings for their institution in WorldCat.
- View the library’s Exchange Rates.

Acquisitions Read Only User

Budgets

- View a budget, including its start and end dates.
- View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures,
and remaining balance.

**Discover Collections**
- Search for and view collections and titles in the WorldCat KnowledgeBase.

**Invoices**
- View an invoice, including the vendor, invoice number, etc.
- View items on an invoice.

**Orders**
- Search and view open orders that have not yet been placed with the vendor.
- Search and view order items.

**Settings**
- Read information about users, regardless of module (Circ, Acq, etc.).
- View the library's Exchange Rates.

**Acquisitions Receive Staff**

**Budgets**
- View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

**Invoices**
- Add an item to an invoice after that item has already been added to a previous invoice, so that the library can process and pay supplemental invoices received to cover adjusted costs for items.
- Add items to an invoice.
- Change an invoice before it's paid.
- Change items on an invoice before it's paid.
- Create an invoice.
- Delete an item from an open (unpaid) invoice.
- Search invoices.
- View an invoice, including the vendor, invoice number, etc.
- View items on an invoice.

**My Labels**
- Can print labels.

**Orders**
- Perform item operations, like adding and editing items.
- Search and view open orders that have not yet been placed with the vendor.
• Search items ordered.

Receiving
• Finish receiving a serial order so that it is marked as completely received by the library.
• Finish receiving an e-product order so that it is marked as completely received by the library.
• Receive outstanding monographs that have been ordered, but not yet received.
• Start receiving an eProduct, so that the library can record the receipt of content on an incomplete order.
• Start receiving serial issues, so that the library can record their receipt on an incomplete order.

Vendors
• Find a vendor.
• View a vendor.
• View My Library and export data.

Settings
• Create, edit and delete copy and item-level holdings for their institution in WorldCat.
• Perform item operations, like adding and editing items.
• Read information about users, regardless of module (Circ, Acq, etc.).
• View all product reports.
• View copy and item-level holdings for their institution in WorldCat.
• View the library's Exchange Rates.
• View My Library and export data.

Acquisitions Reports Viewer

Analytics
• Run Acquisitions reports from the Analytics module.
• View content in the Analytics module, including Reports available via My Files.

Acquisitions Request Creator

Discover Collections
• Search for and view collections and titles in the WorldCat KnowledgeBase.

Purchase requests
• Create a purchase request.

Settings
• View the library's Exchange Rates.
Acquisitions Request Manager

Discover Collections
- Search for and view collections and titles in the WorldCat KnowledgeBase.

Orders
- Order a purchase request.

Purchase requests
- Approve or reject a purchase request.
- Create a purchase request.
- Order a purchase request.

Receiving
- Approve or reject a purchase request.

Settings
- View the library’s Exchange Rates.

Acquisitions Request Reviewer

Discover Collections
- Search for and view collections and titles in the WorldCat KnowledgeBase.

Orders
- Add items to an order.

Purchase requests
- Approve or reject a purchase request.
- Create a purchase request.

Receiving
- Approve or reject a purchase request.

Settings
- View the library’s Exchange Rates.

Acquisitions Senior Order Staff

Budgets
- Update a budget, shortening or extending the end date.
• View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

Discover Collections
• Search for and view collections and titles in the WorldCat KnowledgeBase.

Invoices
• Revert an invoice to an un-paid state in order to correct mistakes and thus alter the corresponding budget expenditures (This feature is not allowed for invoices that use a closed budget).
• View an invoice, including the vendor, invoice number, etc.
• View items on an invoice.

Orders
• Add items to an order.
• Change the link from an item on order to the WorldCat record, in case the wrong WorldCat record or item was selected in "Discover Items."
• Delete an item from an open (unplaced) purchase order, in case an order item was added by mistake or is no longer needed.
• Delete an un-placed purchase order and all its items, so that if the purchase order is no longer valid, it can be removed from the system.
• Select and claim unreceived items and send a message to the vendor.

Receiving
• Finish receiving a serial order so that it is marked as completely received by the library.
• Start receiving an eProduct, so that the library can record the receipt of content on an incomplete order.
• Start receiving serial issues, so that the library can record their receipt on an incomplete order.

Settings
• Access your institution's holdings.
• Create users, regardless of module (Circ, Acq, etc.).
• Delete users.
• Read information about self via WorldCat Local/Discovery.
• The security context contains all the information about a given user (especially what actions they can perform). This permission allows the user to perform actions on behalf of another user (patron).
• View all product reports.
• View the library's Exchange Rates.

Vendors
• Change a vendor order number, order name, and order comments on a placed purchase order, i.e. one that has been submitted to the vendor.
• Create, edit and delete files in the shared files service as part of a corresponding process, such as uploading of files from a vendor for import into Acquisitions.
• Edit vendor data for your library only.
• Place an order, submitting it to the vendor, if not done already.
• Remove a vendor from your list of active partners (in Acquisitions or License Manager).
• Select and claim unreceived items and send a message to the vendor.
• View a vendor.

**Acquisitions Senior Staff**

**Analytics**

• Run Acquisitions reports from the Analytics module.
• View content in the Analytics module, including Reports available via My Files.

**Budgets**

• View a budget, including its start and end dates.
• View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.

**Discover Collections**

• Search for and view collections and titles in the WorldCat KnowledgeBase.

**Invoices**

• Add an item to an invoice after that item has already been added to a previous invoice, so that the library can process and pay supplemental invoices received to cover adjusted costs for items.
• Add items to an invoice.
• Change an invoice before it's paid.
• Change items on an invoice before it's paid.
• Create an invoice.
• Delete an invoice.
• Delete an item from an open (unpaid) invoice.
• Revert an invoice to an un-paid state in order to correct mistakes and thus alter the corresponding budget expenditures (This feature is not allowed for invoices that use a closed budget).
• Search invoices.
• View an invoice, including the vendor, invoice number, etc.
• View items on an invoice.

**Orders**

• Add items to an order.
• Cancel order items, so that they can no longer be received.
• Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.
• Change items on an order, before it has been placed.
• Change the link from an item on order to the WorldCat record, in case the wrong WorldCat record or item was
selected in "Discover Items."

• Create a purchase order.
• Delete an item from an open (unplaced) purchase order, in case an order item was added by mistake or is no longer needed.
• Delete an order item template (in case it is no longer valid for your library).
• Delete an un-placed purchase order and all its items, so that if the purchase order is no longer valid, it can be removed from the system.
• Perform item operations, like adding and editing items.
• Renew order items.
• Search and view open orders that have not yet been placed with the vendor.
• Search and view order items.
• Search items ordered.
• Select and claim unreceived items and send a message to the vendor.

Receiving

• Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.
• Finish receiving a serial order so that it is marked as completely received by the library.
• Finish receiving an e-product order so that it is marked as completely received by the library.
• Receive outstanding monographs that have been ordered, but not yet received.
• Start receiving an eProduct, so that the library can record the receipt of content on an incomplete order.
• Start receiving serial issues, so that the library can record their receipt on an incomplete order.

Settings

• Access your institution's holdings.
• Create, edit and delete copy and item-level holdings for their institution in WorldCat.
• Download and read files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services.
• Perform item operations, like adding and editing items.
• Read information about users, regardless of module (Circ, Acq, etc.).
• Upload a file and store it on the Shared File Service.
• View all product reports.
• View copy and item-level holdings for their institution in WorldCat.
• View the library's Exchange Rates.
• View My Library and export data.
• View the name and other metadata of files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services. It does not allow users to read the file.

Vendors

• Change a vendor order number, order name, and order comments on a placed purchase order, i.e. one that has been submitted to the vendor.
• Create, edit, and delete files in the shared files service as part of a corresponding process, such as uploading of files from a vendor for import into Acquisitions.
• Find a vendor.
• Pay an invoice, so that the vendor can receive payment for items ordered and the library can track the invoice amount as expended, rather than encumbered.
• Place an order, submitting it to the vendor, if not done already.
• Request a price quote from a vendor for a group of items on an order.
• Select and claim unreceived items and send a message to the vendor.
• View a vendor.
• View My Library and export data.

**Acquisitions Settings Staff**

**Settings**

• Update institution configuration information relating to authentication and authorization.

**Serials Admin**

**Analytics**

• Run Acquisitions reports from the Analytics module.
• View content in the Analytics module, including Reports available via My Files.

**My Labels**

• Can print labels.

**Serials**

• Add issues to a binding unit.
• Allows the user to delete an issue in Manage Issues from the list of issues if the issue has not been used for receiving, claiming, or start/stop receiving.
• Can select one or more issues from the "missing issues" list and claim them, optionally sending a notification to the Vendor.
• Complete binding of a binding unit.
• Create a binding unit.
• Create new serial issues for a title. New issues are shared with all libraries.
• Create, edit and delete copy and item-level holdings for your institution in WorldCat.
• Delete a binding unit.
• Edit a binding unit.
• Recall a binding unit from the bindery.
• Receive issue for your library.
• Send a binding unit to the bindery.
• Update serial issues for a title. Issue updates are shared with all libraries.
• View a binding unit.
• View all product reports.
• View copy and item-level holdings for their institution in WorldCat.
• View My Library and export data.
• View serial issues for a title.

Vendors

• Can select one or more issues from the "missing issues" list and claim them, optionally sending a notification to the Vendor.
• View My Library and export data.

Serials Binding Staff

Serials

• Add issues to a binding unit.
• Complete binding of a binding unit.
• Create a binding unit.
• Delete a binding unit.
• Edit a binding unit.
• Recall a binding unit from the bindery.
• Send a binding unit to the bindery.
• View a binding unit.

Serials Claim

Serials

• Can select one or more issues from the "missing issues" list and claim them, optionally sending a notification to the Vendor.
• View serial issues for a title.

Vendors

• Can select one or more issues from the "missing issues" list and claim them, optionally sending a notification to the Vendor.
Serials Receive

My Labels
• Can print labels.

Serials
• Create, edit, and delete copy and item-level holdings for your institution in WorldCat.
• Receive issue for your library.
• View all product reports.
• View copy and item-level holdings for their institution in WorldCat.
• View My Library and export data.
• View serial issues for a title.

Vendor Administrator

Vendors
• Activate a vendor for use within both Acquisitions and Licenses.
• Create a vendor.
• Edit public vendors (indicated by a globe icon) and the public data for this Vendor, including name, country, etc.
• Edit vendor data for your library only.
• Find a vendor.
• Publish a vendor to all libraries.
• Remove a vendor from your list of active partners (in Acquisitions or License Manager).
• View a vendor.
• View all product reports.
• View My Library and export data.

Vendor Manager

Vendors
• Activate a vendor for use within both Acquisitions and Licenses.
• Create a vendor.
• Edit vendor data for your library only.
• Find a vendor.
• Remove a vendor from your list of active partners (in Acquisitions or License Manager).
• View a vendor.
• View all product reports.
• View My Library and export data.