Add item to order

Last updated: Mon, 19 Dec 2022 15:47:56 GMT

Discover how to add an item from WorldCat or the WorldCat knowledge base, an item not found in WorldCat or the WorldCat knowledge base, and how to use an order item template in WorldShare Acquisitions.

Add item from WorldCat

Use Discover Items

In Acquisitions use Discover Items to search through WorldCat for print or other physical format monographs and serials. See WorldCat.

You will need to find a record in WorldCat for both ordering and for adding holdings for items you have in hand, or for items that you have acquired outside of the WMS Ordering process (e.g. gifts).

1. Choose the search Scope to limit your search. See Basic search.
2. Select a search Index. See Basic search.

Check your library’s holdings before ordering

On the search results screen, the middle column indicates whether your library holds the item, as below.

- Held by my library: Your library holds the item.
- Not Held by my library: Your library does not hold the item
- Libraries own this item: The number of libraries that own the item

See details about an item

To see detailed information about an item, place your cursor over the information icon (i) in the search results. A window appears listing information, which varies, depending on the type of item:

<table>
<thead>
<tr>
<th>DISCOVER ITEMS</th>
<th>DISCOVER COLLECTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item:</td>
<td>Collection:</td>
</tr>
<tr>
<td>Author</td>
<td>Available Titles</td>
</tr>
<tr>
<td>Copies ordered:</td>
<td>Collection ID</td>
</tr>
<tr>
<td>Number of copies</td>
<td>Material Type</td>
</tr>
<tr>
<td>ordered, but not</td>
<td></td>
</tr>
<tr>
<td>received</td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Orders/Add_item_to_order
Printed: Sun, 01 Jan 2023 08:44:18 GMT
**Discover Items**

- Copies Owned
- Copies selected: Total number of copies in open orders
- Current Publication Frequency (serials only)
- Date of publication and/or sequential designation (serials only)
- Dewey Call Number
- Edition
- Language of cataloging
- Library of Congress Call Number
- ISBN/ISSN
- OCLC number
- Number of holds (if applicable)
- Physical description
- Publisher
- Series
- Source of cataloging

**Discover Collections**

- Provider
- Selected Titles
- Provider Name and Website

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To close the window, move the cursor away from the information icon (i).

**Add an item to an order or plan**

1. From the search results, find the item you want to order and click Add to > Order.
2. On the Add Item to Order window, change the settings as needed - Table

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Acquisition Type</strong></td>
<td><strong>One-Time</strong>: A one-time order.</td>
</tr>
<tr>
<td><strong>Subscription</strong>: An order for an item that is published in an ongoing manner (no end date), but typically purchased by period. Usually requires renewal by the purchaser at the end of the period.</td>
<td></td>
</tr>
<tr>
<td>SETTING</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>-------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ISBN/ISSN</td>
<td>The ISBN/ISSN WMS sends to the vendor.</td>
</tr>
</tbody>
</table>

**Processing Type**

Select a processing type:

- **Electronic Product** - A nonphysical, electronic title. May be a single item or multi-part item. May be issued in parts indefinitely.
- **Monograph** - Monographs where only one barcode is applied.
- **Serial** - Print serials and multi-part monographs where multiple barcodes are applied.

3. *(Optional)* Apply a template (available for orders only). From the Apply Order Template list, click the **template** you want to apply.

4. To add the item to the order or plan, in the Action column (at right), click **Add**:
   - The number in the Items column increases.
   - Items added to plans can also be received immediately. A message will appear confirming that the item was added. Click **Receive Item** to begin the receiving process. See **Receive Monographs** or **Receive serials and e-products** for more information.

5. Click **Close**.

**Add a monographic series to an existing order**

Note: You cannot currently search Discover Collections for a monographic series.

1. From the search results, find the monographic series you want to order and click **Add to > Order**.
2. From the Add Item to Order dialog window, select the following settings:
   - Acquisition Type - **Subscription**
   - Processing Type - **Monographic Series**
3. *(Optional)* Add any additional information about the monographic series (ISBN, Period, Start Date, and/or End Date) or apply a template (available for orders only). From the Apply Order Template list, click the **template** you want to apply.
4. Find the existing purchase order to which you want to add the monographic series.
5. To add the monographic series to the order, in the Action column (at right), click **Add**. The number in the Items column increases.
6. *(Optional)* Click the **Order Name** to enter details for the order item (e.g., Fund, Location, Price, etc.).
7. Click **Close**.

**Add a monographic series to a new order**

Note: You cannot currently search Discover Collections for a monographic series.

1. From the search results, find the monographic series you want to order and click **Add to > Order**.
2. From the Add Item to Order dialog window, select the following settings:
- Acquisition Type - **Subscription**
- Processing Type - **Monographic Series**

3. **(Optional)** Add any additional information about the monographic series (ISBN, Period, Start Date, and/or End Date) or apply a template (available for orders only). From the Apply Order Template list, click the **template** you want to apply.

4. Click **New Order**.
5. In the Add New Order dialog, select **Purchase Order** for Order Type and complete the other fields as needed.
**Add New Order fields - Table**

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## Order Name (required)

Give a meaningful and unique name to avoid confusion with other orders. Follow local practice.

### Order Type (required)

Select the type of order from the list:

<table>
<thead>
<tr>
<th>ORDER TYPE</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Plan</td>
<td>List of items received as part of an agreement with supplier to send items based on a profile. The library retains the right to return items not needed.</td>
</tr>
<tr>
<td>Blanket Order</td>
<td>List of items received as part of an agreement with a supplier to send items based on a profile. Vendors do not allow the return of items.</td>
</tr>
<tr>
<td>DDA (Demand Driven Acquisitions) Plan</td>
<td>List of items received as part of an agreement with supplier to trigger purchase of online materials based on patron usage.</td>
</tr>
<tr>
<td>Gift/Donation List</td>
<td>List of items received from a specific person or organization for free or at little cost to the library.</td>
</tr>
<tr>
<td>Legal Deposit List</td>
<td>List of items received as part of an</td>
</tr>
<tr>
<td>ORDER TYPE</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>List of items created by library to be submitted to supplier.</td>
</tr>
<tr>
<td>Standing Order</td>
<td>List of items received as part of an agreement with supplier to send items belonging to a series or specific publication.</td>
</tr>
</tbody>
</table>

- **Vendor (not required for purchase orders)**
  As you type, the system automatically suggests vendor names from those listed as in use in Vendors.
  Enter the vendor name in quotes (e.g., "Le Jour") to perform an exact phrase search. Exact phrase searching is useful in cases where the vendor name ends in a word that may match a number of other words in a vendor name (e.g., Le Jour matches vendor names that contain the word Journal).

- **Vendor PO # (number)**
  Add the order number from the vendor, if known. Follow local practice.

- **Tax Handling**
  Select a tax calculation method from the drop-down list.

<table>
<thead>
<tr>
<th>TAX CALCULATION METHOD</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax item cost</td>
<td>Calculates tax amount by multiplying tax</td>
</tr>
<tr>
<td>TAX CALCULATION METHOD</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>percentage by the price</td>
<td></td>
</tr>
<tr>
<td>Tax item, service charge, and shipping cost</td>
<td>Calculates tax amount by multiplying tax percentage by the price, service charges, and shipping</td>
</tr>
<tr>
<td>Includes taxes in costs</td>
<td>Calculates tax amount by considering it as included in the price, service charges, and shipping</td>
</tr>
</tbody>
</table>

**Comments**

Add any notes about the order. Follow local practice.

6. Click **Save**. The new order will appear in the Existing Orders table.

7. Click **Add** to add the volume to the newly created order.

8. (Optional) Click the **Order Name** to enter details for the order item (e.g., Fund, Location, Price, etc.).

**Watch a video**

**Ordering monographs (11:17)**

This video shows how to create a purchase order, add a single part and a multi-part monograph to the order, and how to then place the order in WMS Acquisitions

Ordering serials subscriptions (11:30)

This video shows how to create and place a purchase order for serials subscriptions in WorldShare Acquisitions.
Learn more in a training course: Ordering monographs basics.

Learn more in a training course: Ordering and renewing serials subscriptions

Add item from WorldCat knowledge base

Use Discover Collections to search for e-products in the WorldCat knowledge base. See WorldCat knowledge base.

1. Choose the search Scope to limit your search. See Search for collections, providers or titles.
2. Enter your search terms. The My Selected Collections check box is automatically selected. If you want to search all of the WorldCat knowledge base, deselect the My Selected Collections check box.
3. Click Search or press <Enter>.

Check your library's holdings before ordering

On the search results screen, the middle column indicates whether your library holds the item, as below.

- Held by my library: Your library holds the item.
- Not Held by my library: Your library does not hold the item
- Libraries own this item: The number of libraries that own the item

See details about an item

See details about an item above.

Add the collection to an order or license

1. In the Results list, click Add to > Order to add the collection to an order or license.
2. On the Add Item to Order window, change the settings as needed - Table

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<tr>
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<tr>
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<td>Print serials and multi-part monographs where multiple barcodes are applied.</td>
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3. **(Optional)** Apply a template (available for orders only). From the Apply Order Template list, click the **template** you want to apply.

4. To add the item to the order or plan, in the Action column (at right), click **Add**:
   - The number in the **Items** column increases.
   - Items added to plans can also be received immediately. A message will appear confirming that the item was added. Click **Receive Item** to begin the receiving process. See Receive Monographs or Receive serials and e-products for more information.

5. Click **Close**.

### Add item not in WorldCat or the WorldCat knowledge base

If you have searched WorldCat and WorldCat knowledge base, and no record matches the item you are ordering, you can use any of the following methods to handle this situation:

- Create a record in Record Manager and use this to create the order item and add it to an order in Acquisitions. See WorldShare Record Manager: Bibliographic records.
- Create a custom Collection and/or Title in WorldCat knowledge base. See WorldShare Collection Manager: Choose your Collection Manager workflow. Note: the custom collection will have to be marked as Customizable in order to add a title from the collection to an order.
- **Create a local resource** and add it to an order or purchase request. This should ideally be used for resources that do not belong in WorldCat or the knowledge base, such as memberships, furniture, technology, and supplies. These items can be ordered, or even added directly to an invoice.

Learn more in a training course: Ordering when there’s no WorldCat record.

### Watch a video

**Ordering when there's no WorldCat record (13:07)**

This video shows how to create a brief level record for ordering when no WorldCat record exists.

Media, iframe, embed and object tags are not supported inside of a PDF.
Use an order item template

Order templates are used to store order information that is reused. Templates are applied to items, not to orders. See Manage order item templates.

Note: You cannot use an order item template that uses a disabled fund to add a new item to an order.

1. From the search results, find the item you want to order and click Add to > Order.

2. On the Add Item to Order window, change the settings as needed - Table

<table>
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<td>Select a processing type:</td>
</tr>
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<td></td>
<td>◦ <strong>Serial</strong> - Print serials and multi-part monographs where multiple barcodes are applied.</td>
</tr>
</tbody>
</table>

3. From the Apply Order Template list, click the template you want to apply.

4. Check and edit the details in Item Details (Template: [name]). You can edit or apply the following fields to an order item when using an order item template.

**Available fields in an order item template - Table**

<table>
<thead>
<tr>
<th>TAB</th>
<th>EDITABLE FIELD</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>◦ Requestor</td>
</tr>
<tr>
<td></td>
<td>◦ Display in WorldCat</td>
</tr>
<tr>
<td>Location</td>
<td>◦ Branch</td>
</tr>
<tr>
<td></td>
<td>◦ Location</td>
</tr>
<tr>
<td>TAB</td>
<td>EDITABLE FIELD</td>
</tr>
<tr>
<td>--------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Pricing</td>
<td>• Unit Price&lt;br&gt;• %</td>
</tr>
<tr>
<td>Budget/Fund</td>
<td>• Budget(s)&lt;br&gt;• Fund(s)</td>
</tr>
<tr>
<td>Notes</td>
<td>Any existing notes</td>
</tr>
<tr>
<td>Custom Fields</td>
<td>• Staff name&lt;br&gt;• Priority&lt;br&gt;• Date Returned&lt;br&gt;• Academic Department</td>
</tr>
</tbody>
</table>

5. To add the item to the order or plan, in the Action column (at right), click **Add**:  
6. Click **Close**.

### Add order data to an EBSCO order using an EBSCAN file

1. On the left navigation, click **Discover Items**.  
2. From the Scope drop-down list, select a search scope.  
   - Select **My Library Holdings** if you already have at least one copy of an item.  
   - Select **All WorldCat** if you do not own any copies of the item.  
3. From the Index drop-down list, select **ISSN**.  
4. Scan an ISSN from the EBSCAN file.  
5. Click **Search** or press <Enter>.  
6. From the search results, find the item you want to order and click **Add to > Order**.  
7. Find the existing EBSCO order you want to add the item to, or create a new order.  
8. Navigate to the order you added the order item to.  
9. **(Optional)** Use the **Configure button** (🔧) to add the editable Vendor Item # column to the list of order items, if it isn’t already.  
10. Scan in the matching EBSCO order number in the Vendor Order Item Number field for the item you just added, or open the individual item to scan in the order numbers.

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Printed: Sun, 01 Jan 2023 08:44:18 GMT
11. **(Optional)** Add any additional information for the order item (e.g. Price, Location, Quantity, Fund, etc.).
12. Click **Close**.