Learn about the roles available for managing accounts in WorldShare Acquisitions.

**WorldShare Admin**

For more information about roles and managing accounts, see [WorldShare Admin, User management](#).

To view all available WorldShare roles, see [WorldShare Admin, Roles](#).

**Roles**

- Acquisitions Admin
- Acquisitions Order Staff
- Acquisitions Read Only User
- Acquisitions Receive Staff
- Acquisitions Request Creator
- Acquisitions Request Manager
- Acquisitions Request Reviewer
- Acquisitions Senior Order Staff
- Acquisitions Senior Staff
- Selector
- Serials Admin
- Serials Binding Staff
- Serials Claim
- Serials Receive
- Vendor Administrator
- Vendor Manager

**Acquisitions role comparison by action**
### Budgets

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</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 remove) money from the fund.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Close the budget for the current fiscal cycle, including transferring any open encumbrances to the next fiscal cycle.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Copy the fund structure from a previous budget to a new budget, so that they do not</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

[https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles)

Printed: Mon, 07 Mar 2022 13:16:54 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</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>have to re-enter all the fund details into the new budget.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create a budget for a future time period.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create a fund for a budget.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS ORDER STAFF</td>
<td>ACQUISITIONS READ ONLY USER</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
<td>ACQUISITIONS SENIOR STAFF</td>
</tr>
<tr>
<td>--------</td>
<td>--------------------</td>
<td>--------------------------</td>
<td>-----------------------------</td>
<td>-----------------------------</td>
<td>-------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>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.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Modify the end date of an open (current or future)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
</tbody>
</table>

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.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</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>budget to adjust for changing fiscal cycles and budget periods or make simple corrections to the time period of a budget.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update a budget, shortening or extending the end date.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>View a budget, including its start and end dates.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>View funds in a budget, including fund name, fund code, fund structure, allocation, encumbrances, expenditures, and remaining balance.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
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<table>
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<tr>
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<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>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add items to an invoice.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change an invoice before it's paid.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change items on an invoice before it's paid.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create an invoice.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete an invoice.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete an item from an open (unpaid) invoice.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revert an invoice to un-paid state in order to correct</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Mistakes can be corrected and thus alter the corresponding budget expenditures. (This feature is not allowed for invoices that use a closed budget).

<table>
<thead>
<tr>
<th>Action</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS RECEIVE STAFF</th>
<th>SERIALS ADMIN</th>
<th>SERIALS RECEIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can print labels.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Search invoices.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>View an invoice, including the vendor, invoice number, etc.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>View items on an invoice.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>

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<th>ACQUISITIONS READ ONLY USER</th>
<th>ACQUISITIONS ORDER STAFF</th>
<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>Add items to an order.</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</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>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</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></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Change items on an order, before it has been placed.</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Change the link from an item on order to the WorldCat</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Action</td>
<td>Role 1</td>
<td>Role 2</td>
<td>Role 3</td>
<td>Role 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create an order record, in case the wrong WorldCat record or item was selected in “Discover Items.”</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create a purchase order.</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete an item from an open (unplaced) purchase order, in case an order item was added by mistake or is no longer needed.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete an order item template (in case it is no longer valid for your library).</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete an order item template (in case it is no longer valid for your library).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
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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.

<table>
<thead>
<tr>
<th>Order a purchase request.</th>
<th>x</th>
<th>x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perform item operations, like adding and editing items.</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Renew order items.</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Search and view open orders that have not yet been placed with the vendor.</td>
<td>x</td>
<td>x</td>
</tr>
</tbody>
</table>
## Purchase requests

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS ORDER STAFF</th>
<th>ACQUISITIONS REQUEST CREATOR</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>Search</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>items approved or rejected</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Select purchase and request claim</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>unreceived items</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Create a purchase request and send a message to the vendor</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
<td>ACQUISITIONS REQUEST MANAGER</td>
<td>ACQUISITIONS REQUEST REVIEWER</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
<td>ACQUISITIONS SENIOR STAFF</td>
<td></td>
</tr>
<tr>
<td>------------------------------------------------------------------------</td>
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<td></td>
</tr>
<tr>
<td>Approve or reject a purchase request.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change an open (unsubmitted) purchase order. It does not allow editing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>the items on the order.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finish receiving a serial order so that it is marked as completely</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>received by the library.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finish receiving an e-product order so that it is marked as completely</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>received by the library.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive outstanding monographs that have been ordered, but not yet</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>received.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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<p>| receiving an e-product, 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. | x | x |  |  |</p>
<table>
<thead>
<tr>
<th>ACTION</th>
<th>SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add issues to a binding unit.</td>
<td>x</td>
<td>x</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>
</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>
</tr>
<tr>
<td>Complete binding of a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create a binding unit.</td>
<td></td>
<td>x</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>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create, edit, and delete copy and item-level holdings for your institution in WorldCat.</td>
<td></td>
<td>x</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Delete a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>Role 1</td>
<td>Role 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>--------</td>
<td>--------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recall a binding unit from the bindery.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive issue for your library.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Send a binding unit to the bindery.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update serial issues for a title.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Issue updates are shared with all libraries.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View a binding unit.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View all product reports.</td>
<td>x</td>
<td></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>
</tr>
<tr>
<td>View My Library and export data.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View serial issues for a title.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Settings
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS ORDER STAFF</th>
<th>ACQUISITIONS READ ONLY USER</th>
<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>
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<tbody>
<tr>
<td>Access your institution's holdings.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.).</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Create, edit and delete copy and item-level holdings for their institution in WorldCat.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Delete users.</td>
<td>x</td>
<td></td>
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<tr>
<td>Download and</td>
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</tr>
<tr>
<td>Read files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services.</td>
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</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Perform item operations, like adding and editing items.</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</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>
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<td></td>
</tr>
<tr>
<td>Read information about users, regardless of module (Circ,</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action</td>
<td>Permission Required</td>
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<td></td>
</tr>
<tr>
<td>Retrieve and view users.</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>The security context contains all the information about a given user</td>
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<td></td>
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<tr>
<td>(especially what actions they can perform).</td>
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</tr>
<tr>
<td>This permission allows the user to perform actions on behalf of another user (patron).</td>
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<tr>
<td>Update information about other users, regardless of module (Circ, Acq, etc.).</td>
<td>X</td>
<td></td>
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<tr>
<td>Update information</td>
<td>X</td>
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<tr>
<td>Action</td>
<td>Column 1</td>
<td>Column 2</td>
<td>Column 3</td>
<td>Column 4</td>
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<tr>
<td>About self via WorldCat Local/Discovery.</td>
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<tr>
<td>Update institution configuration information relating to authentication and authorization.</td>
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<td></td>
<td></td>
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</tr>
<tr>
<td>Upload a file and store it on the Shared File Service.</td>
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<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Use the Forgot Password feature to get a new password.</td>
<td>x</td>
<td></td>
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</tr>
<tr>
<td>View all product reports.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
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</tr>
<tr>
<td>View copy and item-level holdings for their institution in WorldCat.</td>
<td>x</td>
<td>x</td>
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<td>x</td>
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<tr>
<td>View</td>
<td>x</td>
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</tbody>
</table>
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 My Library and export data. | x | x | x |
| View the name and other metadata of files stored | x | | x |
on the shared file service, such as those uploaded for processing by Partner Exchange Services. It does not allow users to read the file.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS RECEIVE STAFF</th>
<th>ACQUISITIONS SENIOR ORDER STAFF</th>
<th>ACQUISITIONS SENIOR STAFF</th>
<th>SERIALS ADMIN</th>
<th>SERIALS CLAIM</th>
<th>VENDOR ADMINISTRATOR</th>
<th>VENDOR MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activate a vendor for use within both Acquisitions and Licenses.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
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</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>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
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<tr>
<td>Change a vendor order number, order name, and order comments on a placed purchase order, i.e. one that has</td>
<td>x</td>
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<td>Action</td>
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<tr>
<td>been submitted to the vendor.</td>
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<tr>
<td>Create a vendor.</td>
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<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>x</td>
<td>x</td>
<td>x</td>
<td></td>
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<tr>
<td>Edit public vendors (indicated by a globe icon) and the public data for this Vendor, including name, country, etc.</td>
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<td>x</td>
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<td>Edit</td>
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<td>Action</td>
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<tr>
<td>Find a vendor.</td>
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<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>
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<tr>
<td>Place an order, submitting it to the vendor, if not done already.</td>
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<tr>
<td>Publish a vendor to all libraries.</td>
<td>X</td>
<td>X</td>
<td>X</td>
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<tr>
<td>Remove a</td>
<td>X</td>
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<td>X</td>
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</tr>
<tr>
<td>Task</td>
<td>Active</td>
<td>Passive</td>
<td>Approved</td>
<td>Requested</td>
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<td>----------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Request a price quote from a vendor for a group of items on an order.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Select and claim unreceived items and send a message to the vendor.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
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</tr>
<tr>
<td>Upload MARC files from a vendor to be imported into Acquisitions.</td>
<td>x</td>
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<tr>
<td>View a vendor.</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>View all product</td>
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</tr>
</tbody>
</table>
Acquisitions roles and associated actions

**Acquisitions Admin**

**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 changing 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 the logs of a vendor import/export process, such as the cycle that begins when uploading a file to one of the Partner Exchange Services.**

**View My Library and export data.**

**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.

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles

Printed: Mon, 07 Mar 2022 13:16:54 GMT
• 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.
• 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.
• 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 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 Order Staff

Budgets

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

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.
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.

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.).

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 My Library and export data.

Acquisitions Request Creator

Purchase requests
• Create a purchase request.

Acquisitions Request Manager

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.
Acquisitions Request Reviewer

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.
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.

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.

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

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.

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 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.

Serials Admin

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.

Analytics

See Reports and Report Designer roles for a list of available standard reports and associated roles.