Administer your institution configuration for WorldShare Acquisitions

Discover how to administer your institution configuration for WorldShare Acquisitions. You can administer your institution configuration settings from WorldShare Acquisitions. On the left navigation, click Settings > Administration to access your institution configuration settings. You can modify the following areas from the Administration screen.

**Budget and Pricing**

1. Click **Budget and Pricing accordion** to open the accordion.
2. For Default Budget Period Duration, select the default duration for new budget periods created from the drop-down list.
   - 6 months
   - 1 year
   - 2 years
   
   Caution: This field is not currently working as expected. OCLC recommends not using it to set a budget period duration at this time.
3. For Default Tax Handling, select the default tax handling to be used on new orders and new invoices from the drop-down list.
   - **Tax item cost** - Tax is calculated based only on the item cost, rather than the sum of the item price with service charges and shipping.
   - **Tax item, shipping, and service costs** - Tax is calculated based on a percentage of the sum of the item price along with the service charges and shipping costs. Use when service charges and shipping costs are also taxed.
   - **Include taxes in costs** - Tax is included in the unit price of the item itself.

   Note: The default tax handling can be overridden manually in an order or invoice.

**Receiving and Local Holding Record**

1. Click **Receiving and Local Holding Record** to open the accordion.
2. For Default Shelving Scheme, select the shelving scheme to use for new local holdings records created by Acquisitions during receiving from the drop-down list. Your selection also determines which call number from the bibliographic record to pull into the Receiving and Invoicing screen in Acquisitions.
   - **Dewey Decimal** - Also pulls in the Dewey Decimal call number from the bibliographic record into the Receive and Invoice screen.
Library of Congress - Also pulls in the Library of Congress call number from the bibliographic record into the Receive and Invoice screen.

MARC Code

National Library of Medicine - Also pulls in the NLM call number from the bibliographic record into the Receive and Invoice screen.

Other

Shelved Separately

Shelving Control Number

Superintendent of Documents

Title

Unknown

3. For Local Holding Record Pricing, select how the price of any local holding records created by Acquisitions is calculated.

   ◦ None - No price is set when creating the Local Holding Record.
   ◦ Unit Price, plus Taxes, Shipping, and Service Charges - Sets the price of the Local Holding Record based on the total price of the order item, including unit price, taxes, shipping, and service charges.
   ◦ Unit Price - Sets the price of the Local Holding Record based only on the unit price of the order item.

4. For Set Arrival Date, select the check box to display the dialog to set the arrival date after receiving an item.

5. For Receiving Alerts:
   ◦ Select the Holds check box to receive an alert when an item being received has a hold on it.
   ◦ Select the Requestor check box to receive an alert when an item being received has a requestor.

6. For Use most recent call number for additional copies of order item, select the check box to have the call number of subsequent copies in an order pre-filled with the call number from previously received copies of the same order.

Custom Fields

1. Click Custom Fields to open the accordion.

2. For Prevent Modifications To:
   ◦ Select the Order Item Custom Fields check box to prevent users from modifying Fields 11-20 of the order item custom fields.
   ◦ Select the Invoice Item Custom Fields check box to prevent users from modifying Fields 11-20 of the invoice item custom fields.

3. For Import, select the Enabled check box to allow the import of custom field data into Acquisitions.

Optional Features

1. Click Optional Features to open the accordion.

2. For Display:
   ◦ Select the Legal Deposit Receipts check box to enable viewing of Legal Deposit Receipts in the left navigation.
   ◦ Select the Statistics Value check box to enable the Statistics Value field on the order item.
Enter a value in the **Accrual Mode Threshold** box to enable the accrual mode threshold feature, or leave blank to disable it.