WorldShare Acquisitions

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WorldShare Acquisitions facilitates ordering, receiving, and processing of physical and electronic items.

- **Get started**
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  Get started with WorldShare Acquisitions.
  
  - About Acquisitions
  - Acquisitions account roles
  - Acquisitions terms
  - Contact OCLC Order Services
  - Set or reset your password
  - Sign in to Acquisitions

- **Budget**
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  Discover how to create, manage, and choose budgets and funds.
  
  - Choose a fund on an order/invoice
  - Close a budget
  - Create a budget for the first time
  - Create a budget for the next fiscal period
  - Create funds
  - Delete funds
  - Download a budget
  - Edit budget
  - Edit funds
  - Notes for funds

- **Order**
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Use Orders to manage your orders, plans, and order items.

- Add item to order
- Create new order
- Import an order
- Manage order item templates
- Place an order
- Request a quote
- Search existing orders
- View and edit an order

- Renew
  
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  Discover how to renew stand alone and subscription items.
  
  - Subscription

- Claim and cancel
  
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  Discover how to claim and cancel order and subscription items.
  
  - Claim
  - Cancel

- Receive
  
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  Discover how to receive monographs, e-products, serials, and serial issues.
  
  - Monographs
  - Serial and e-products
  - Serial issues

- Invoice
  
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  Find out how to create, edit, import, and pay invoices.
  
  - Add not ordered items to invoice
  - Add ordered items to invoice
  - Create new invoice
  - Edit an invoice
  - Import invoices
- Integrate invoices with an external financial system
- Invoice while receiving
- Mark as ready
- Pay an invoice
- Unpay an invoice

- **Vendors**

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  In WorldShare Acquisitions, a vendor is a company from which you buy materials (or access to information).

  - Baker & Taylor EDIFACT configuration
  - Create a new vendor
  - Edit a vendor
  - Import invoices and orders
  - ProQuest EDIFACT configuration
  - Publish a vendor
  - Search for a vendor
  - Send your vendor EDIFACT order information via email

- **Search**

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  Acquisitions provides a variety of methods to search by, including encumbrances, vendors, and order items.

  - Find encumbrances
  - Invoices
  - Invoice items
  - Missing serial issues
  - Orders
  - Order items
  - Saved searches
  - Search for a vendor
  - Vendors
  - WorldCat
  - WorldCat knowledge base

- **Release notes and known issues**

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  Release notes are documents that contain information about new product features and enhancements as installed in scheduled releases.
• WorldShare Acquisitions release notes, July 2016
• WorldShare Acquisitions release notes, October 2016
• WorldShare Acquisitions release notes, February 2017
• WorldShare Acquisitions release notes, June 2017
• WorldShare Acquisitions release notes, October 2017
• Known issues
• WorldShare Acquisitions release notes, December 2017

• Training

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Find training on WorldShare Acquisitions.

◦ Ordering when there is no WorldCat record
◦ Manage budgets and vendors
◦ Managing standing orders
◦ Managing approval plans
◦ Receiving and invoicing serials subscriptions
◦ Ordering and renewing serials subscriptions
◦ Ordering monographs basics
◦ Receiving and invoicing monographs
◦ Adding serials holdings
◦ Adding monograph holdings
◦ Videos
◦ Exercises