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

To view all available WorldShare roles, see [WorldShare Admin, Roles](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles).

**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/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles) for a list of available standard reports and associated roles.

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Acquisitions reports from the Analytics module.</td>
<td>ACQUISITIONS ADMIN</td>
</tr>
<tr>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Run serials reports from the Analytics module.</td>
<td>x</td>
</tr>
<tr>
<td></td>
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</tr>
<tr>
<td>Run vendor reports from the Analytics module.</td>
<td>x</td>
</tr>
<tr>
<td>Utilize My Library and My Files functionality in Analytics.</td>
<td>x</td>
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https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
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## 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 REORDER 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>x</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>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS BUDGET MANAGER</td>
<td>ACQUISITIONS BUDGET STAFF</td>
<td>ACQUISITIONS CATALOGING STAFF</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>
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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 budget.</td>
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<tr>
<td>Create a budget for a future time period.</td>
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<tr>
<td>Create a fund for a budget.</td>
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<tr>
<td>Delete a fund from a budget, assuming the fund does</td>
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<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS BUDGET MANAGER</td>
<td>ACQUISITIONS BUDGET STAFF</td>
<td>ACQUISITIONS CATALOGING STAFF</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>
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</tbody>
</table>

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

<p>| | x | x | x |</p>
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS BUDGET MANAGER</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>actions depend on whether a budget is open or closed, enabled or not, and the presence or absence of future budgets.</td>
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<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</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS BUDGET MANAGER</td>
<td>ACQUISITIONS BUDGET STAFF</td>
<td>ACQUISITIONS CATALOGING STAFF</td>
<td>ACQUISITIONS ORDER STAFF</td>
<td>ACQUISITIONS READ ONLY USER</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
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<tr>
<td>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 make simple corrections to the time period of a budget.</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Update a budget, shortening or extending the end date.</td>
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<tr>
<td>View a budget, including</td>
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<th>ACQUISITIONS ADMIN</th>
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<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 STAFF</th>
<th>ACQUISITIONS SENIOR STAFF</th>
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<tbody>
<tr>
<td>its start and end dates.</td>
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<td>x</td>
<td>x</td>
<td>x</td>
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</tr>
<tr>
<td>Search for collections and view funds in the budget, including fund name and WorldCat KnowledgeBase.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Search for and view collections and titles in the WorldCat KnowledgeBase.</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS READ ONLY USER</td>
<td>ACQUISITIONS RECEIVE STAFF</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
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<tr>
<td>Create supplemental, credit, and refund invoice items.</td>
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<td>x</td>
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<tr>
<td>Create debit invoice item.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
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<tr>
<td>Change an invoice before it's paid.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
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<tr>
<td>Change items on an invoice before it's paid.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
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<tr>
<td>Create an invoice.</td>
<td>x</td>
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<td>x</td>
<td>x</td>
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<tr>
<td>Delete an invoice.</td>
<td>x</td>
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<td>x</td>
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<tr>
<td>Delete an item from an open (unpaid) invoice.</td>
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<td>x</td>
<td>x</td>
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<tr>
<td>Revert an invoice to un-paid state in order to correct mistakes and</td>
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<td></td>
<td>x</td>
<td>x</td>
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<tr>
<td>thus alter the corresponding budget expenditures (This feature is</td>
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<td>not allowed for invoices that use a closed budget).</td>
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<tr>
<td>My Labels invoices.</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td><strong>ACTION</strong></td>
<td><strong>ACQUISITIONS ADMIN</strong></td>
<td><strong>ACQUISITIONS RECEIVE STAFF</strong></td>
<td><strong>SERIALS ADMIN</strong></td>
<td><strong>SERIALS RECEIVE</strong></td>
<td></td>
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<tr>
<td>including the vendor, invoice number, etc.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Can print labels.</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>
<td>x</td>
<td>x</td>
<td>x</td>
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<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>
<td>ACQUISITIONS REQUEST MANAGER</td>
<td>ACQUISITIONS REQUEST REVIEWER</td>
<td>ACQUISITIONS SENIOR ORDER STAFF</td>
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<tr>
<td>Add items to an order.</td>
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<td>x</td>
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<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Cancel order items, so that they can no longer be received.</td>
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<td>x</td>
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<td></td>
<td>x</td>
<td>x</td>
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<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>
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<td>x</td>
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<tr>
<td>Change items on an order, before it has been placed.</td>
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<td>Change the link from</td>
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<table>
<thead>
<tr>
<th>Task</th>
<th>Role 1</th>
<th>Role 2</th>
<th>Role 3</th>
<th>Role 4</th>
<th>Role 5</th>
<th>Role 6</th>
<th>Role 7</th>
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</thead>
<tbody>
<tr>
<td>Change the resource for order items.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
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</tr>
<tr>
<td>Create a purchase order.</td>
<td>x</td>
<td></td>
<td>x</td>
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<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></td>
<td>x</td>
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<td>x</td>
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<td>x</td>
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<tr>
<td>Action</td>
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<tr>
<td>or is no longer needed.</td>
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<tr>
<td>Delete an order item template (in case it is no longer valid for your library).</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
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</tr>
<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>
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<td>x</td>
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<td>x</td>
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<tr>
<td>Order a purchase request.</td>
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<td>x</td>
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<tr>
<td>Perform item operations,</td>
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<tr>
<td>ACTION</td>
<td>ACQUISITIONS ADMIN</td>
<td>ACQUISITIONS ORDER STAFF</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>Renew</td>
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<td>x</td>
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<tr>
<td>Approve order items or reject</td>
<td></td>
<td>x</td>
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<tr>
<td>Search, purchase and request view</td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Create a purchase request that have not yet been placed with the vendor.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
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<tr>
<td>Search and view order items.</td>
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<tr>
<td>Search items ordered.</td>
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<td></td>
<td>x</td>
</tr>
<tr>
<td>Select and claim unreceived items and send a message to the vendor.</td>
<td>x</td>
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<td>x 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>
<td>--------------------</td>
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<td>--------------------------------</td>
<td>-------------------------------</td>
<td>---------------------------------</td>
<td>---------------------------</td>
<td></td>
</tr>
<tr>
<td>Approve or reject a purchase request.</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>x</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>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Finish receiving a serial order so that it is marked as completely received by the library.</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>Finish receiving an e-product order so that it is marked as completely received by the library.</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive outstanding monographs that have been ordered, but not yet received.</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>receiving an e-product, so that the library can record the receipt of content on an incomplete order.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start receiving serial issues, so that the library can record their receipt on an incomplete order.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
Printed: Fri, 23 Sep 2022 08:33:58 GMT
<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></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></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>
</tr>
<tr>
<td>Delete a binding unit.</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Edit a binding unit.</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Task Description</td>
<td>Role 1</td>
<td>Role 2</td>
<td>Role 3</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. Issue updates are shared with all libraries.</td>
<td></td>
<td></td>
<td>x</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>x</td>
<td></td>
</tr>
<tr>
<td>View copy and item-level holdings for their institution in WorldCat.</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>View My Library and export data.</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>View serial issues for a title.</td>
<td>x</td>
<td>x</td>
<td>x</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>
</tr>
<tr>
<td>--------</td>
<td>-------------------</td>
<td>--------------------------------------</td>
<td>--------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Configure HTTP order notifications.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create, edit and delete copy and item-level holdings for their institution in WorldCat.</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>
</tr>
<tr>
<td>Upload a file and store it on the Shared File Service.</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>View all product reports.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View the library's Exchange</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
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# User Management

View the metadata of files 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 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>Access the Admin module on WorldShare.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign roles to other users.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create new user accounts.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete user accounts.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search user accounts.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Read information about user accounts.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Link](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles)
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQUISITIONS ADMIN</th>
<th>ACQUISITIONS CATALOGING STAFF</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></td>
<td></td>
<td>x, x</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>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x, x</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>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>Role 1</td>
<td>Role 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>one that has been submitted to the vendor.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create a vendor.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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>x</td>
<td>x</td>
<td></td>
<td></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</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
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<table>
<thead>
<tr>
<th>Task</th>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
<th>Column 4</th>
<th>Column 5</th>
<th>Column 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>for processing by Partner Exchange Services.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit public vendors (indicated by a globe icon) and the public data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>for this Vendor, including name, country, etc.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit vendor data for your library only.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Find a vendor.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay an invoice, so that the vendor can receive payment for items</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ordered and</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>Action</td>
<td>Action</td>
<td>Action</td>
<td>Action</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td>--------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>the library can track the invoice amount as expended, rather than encumbered.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Place an order, submitting it to the vendor, if not done already.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publish a vendor to all libraries.</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Remove a vendor from your list of active partners (in Acquisitions or License Manager).</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request a price quote from a vendor for a</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Action Description</td>
<td>Role A</td>
<td>Role B</td>
<td>Role C</td>
<td>Role D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------</td>
<td>--------</td>
<td>--------</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></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upload MARC files from a vendor to be imported into Acquisitions.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View a vendor.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View all product reports.</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>View the logs of a vendor import/export process, such as the process that begins when</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Acquisitions roles and associated actions

<table>
<thead>
<tr>
<th>Action</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uploading a file to one of the Partner Exchange Services.</td>
<td></td>
<td></td>
<td></td>
<td></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>
<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)
Acquisitions Admin

Analytics

• Run Acquisitions reports from the Analytics module.
• Run serials reports from the Analytics module.
• Run vendor reports from the Analytics module.
• Utilize My Library and My Files functionality in Analytics.

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

• Create supplemental, credit, and refund invoice items.
• Change an invoice before it's paid.
• Change items on an invoice before it's paid.
• Create an invoice.
• Create debit invoice items.
• 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

- Configure HTTP order notifications.
- Create, edit and delete copy and item-level holdings for their institution in WorldCat.
- Modify the library’s Exchange Rates.
- Upload a file and store it on the Shared File Service.
- View all product reports.
- View the library's Exchange Rates.
- 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.

User Management

- Access the Admin module in WorldShare.
- Assign roles to other users.
- Create new user accounts.
- Delete user accounts.
- Read information about user accounts.
- Search user accounts.

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.
- Download and read files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services.
- 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,
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

- View the library's Exchange Rates.

User Management

- Read information about user accounts.

Acquisitions Receive Staff

Budgets

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

Invoices

- Change an invoice before it's paid.
- Change items on an invoice before it's paid.
- Create an invoice.
- Create debit invoice item.
- Create supplemental, credit, and refund invoice items.
- 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.
• View all product reports.
• View the library's Exchange Rates.

User Management
• Read information about user accounts.

Acquisitions Reports Viewer

Analytics
• Run Acquisitions reports from the Analytics module.
• Run serials reports from the Analytics module.
• Utilize My Library and My Files functionality in Analytics.

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**

• View all product reports.
• View the library's Exchange Rates.

**User Management**

• Create new user accounts.
• Delete user accounts.
• Read information about user accounts.

**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.
• Run serials reports from the Analytics module.
• Utilize My Library and My Files functionality in Analytics.

**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**

• Change an invoice before it's paid.
• Change items on an invoice before it's paid.
• Create an invoice.
• Create debit invoice items.
• Create supplemental, credit, and refund invoice items.
• 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

• Create, edit and delete copy and item-level holdings for their institution in WorldCat.

• Upload a file and store it on the Shared File Service.

• View all product reports.

• View the library's Exchange Rates.

• 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.

• Download and read files stored on the shared file service, such as those uploaded for processing by Partner Exchange Services.

• 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

• Configure HTTP order notifications.
• Create, edit and delete copy and item-level holdings for their institution in WorldCat.

Serials Admin

Analytics

• Run serials reports from the Analytics module.
• Utilize My Library and My Files functionality in Analytics.

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**

Note: See [Reports and Report Designer roles](https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles) for a list of available standard reports and associated roles.

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