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
- ACQ_ORDER_STAFF
- ACQ_READ_ONLY_USER
- ACQ_RECEIVE_STAFF
- ACQ_REQUEST_CREATOR
- ACQ_REQUEST_MANAGER
- ACQ_REQUEST_REVIEWER
- ACQ SENIOR STAFF
- ACQ SENIOR ORDER STAFF
- SELECTOR
- SERIALS_ADMIN
- SERIALS BINDING STAFF
- SERIALS CLAIM
- SERIALS RECEIVE
- VIC Vendor Administrator
- VIC Vendor Manager

### Acquisitions role comparison

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>your institution’s holdings</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Activate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>a</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQ ADMIN</td>
<td>ACQ ORDER STAFF</td>
<td>ACQ READ ONLY</td>
<td>ACQ RECEIVE STAFF</td>
<td>ACQ REQUEST CREATOR</td>
<td>ACQ REQUEST MANAGER</td>
<td>ACQ REQUEST REVIEWER</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------</td>
<td>-----------------</td>
<td>---------------</td>
<td>-------------------</td>
<td>---------------------</td>
<td>---------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>vendor for use within both Acquisitions and Licenses.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add an item to an invoice after that item has already been added to a previous invoice, so that they library can process and pay supplemental invoices received to cover adjusted costs for items.</td>
<td>x</td>
<td></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></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add items</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ROLES</td>
<td></td>
<td></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>
</tr>
<tr>
<td>ACQ</td>
<td>ADMIN</td>
<td>ACQ ORDER STAFF</td>
<td>ACQ READ ONLY</td>
<td>ACQ RECEIVE STAFF</td>
<td>ACQ REQUEST</td>
<td>ACQ REQUEST</td>
<td>ACQ REQUEST</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>CREATOR</td>
</tr>
</tbody>
</table>

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.

Allows user to delete an issue in Manage Issues from the list of issues, if the issue has not
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST REQUEST</th>
<th>ACQ REQUEST REQUEST</th>
<th>ACQ REQUEST REQUEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>been used for receiving, claiming, or start/stop receiving.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Approve or reject a purchase request.</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assign roles to other users. Create a user that automatically has the Everyone role assigned.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can print labels.</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can select one or more issues from the &quot;missing issues&quot; list and claim</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
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>them, optionally sending a notification to the Vendor.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancel order items, so that they can no longer be received.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Change an invoice before it is paid.</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change items on an invoice before it is paid.</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change items on an order, before it has been placed.</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change the link from an</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>item on order</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>to the WorldCat 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>Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change a vendor order number, order name, and order comments on a placed purchase</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
order, i.e. one that has been submitted to the vendor.

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.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>into the new budget.</td>
<td></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></td>
<td></td>
<td></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>x</td>
<td></td>
<td></td>
<td>x</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</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)

Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>vendor for import</strong></td>
<td><strong>ACQ</strong>&lt;br&gt;<strong>ACQ</strong>&lt;br&gt;<strong>ACQ</strong>&lt;br&gt;<strong>ACQ</strong>&lt;br&gt;<strong>ACQ</strong>&lt;br&gt;<strong>ACQ</strong>&lt;br&gt;<strong>ACQ</strong></td>
</tr>
<tr>
<td><strong>into Acquisitions</strong></td>
<td><strong>ADMIN</strong>&lt;br&gt;<strong>ORDER</strong>&lt;br&gt;<strong>READ</strong>&lt;br&gt;<strong>RECEIVE</strong>&lt;br&gt;<strong>REQUEST</strong>&lt;br&gt;<strong>REQUEST</strong>&lt;br&gt;<strong>REQUEST</strong>&lt;br&gt;<strong>REQUEST</strong>&lt;br&gt;<strong>REQUEST</strong>&lt;br&gt;<strong>REQUEST</strong>&lt;br&gt;<strong>CREATOR</strong>&lt;br&gt;<strong>MANAGER</strong>&lt;br&gt;<strong>REVIEWER</strong></td>
</tr>
<tr>
<td>Create a fund for a</td>
<td>x</td>
</tr>
<tr>
<td>budget.</td>
<td></td>
</tr>
<tr>
<td>Create an invoice.</td>
<td>x</td>
</tr>
<tr>
<td>Create new serial</td>
<td>x</td>
</tr>
<tr>
<td>issues for a title.</td>
<td>x</td>
</tr>
<tr>
<td>New issues are shared</td>
<td>x</td>
</tr>
<tr>
<td>with all libraries.</td>
<td></td>
</tr>
<tr>
<td>Create a purchase</td>
<td>x</td>
</tr>
<tr>
<td>order.</td>
<td>x</td>
</tr>
<tr>
<td>Create a purchase</td>
<td>x</td>
</tr>
<tr>
<td>request.</td>
<td>x</td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td>x</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a vendor.</td>
<td>ACQ ADMIN ACQ ORDER STAFF ACQ READ ONLY ACQ RECEIVE STAFF ACQ REQUEST CREATOR MANAGER REVIEWER</td>
</tr>
<tr>
<td>Delete a fund from a budget, assuming the fund does not have any open transactions (encumbrances, expenditures, etc.)</td>
<td>ACQ ADMIN ACQ ORDER STAFF ACQ READ ONLY ACQ RECEIVE STAFF ACQ REQUEST CREATOR MANAGER REVIEWER</td>
</tr>
<tr>
<td>Delete an invoice.</td>
<td>ACQ ADMIN ACQ ORDER STAFF ACQ READ ONLY ACQ RECEIVE STAFF ACQ REQUEST CREATOR MANAGER REVIEWER</td>
</tr>
<tr>
<td>Delete an item from an open (unpaid) invoice.</td>
<td>ACQ ADMIN ACQ ORDER STAFF ACQ READ ONLY ACQ RECEIVE STAFF ACQ REQUEST CREATOR MANAGER REVIEWER</td>
</tr>
<tr>
<td>Delete an item from an open (unplaced) purchase order, in case an order</td>
<td>ACQ ADMIN ACQ ORDER STAFF ACQ READ ONLY ACQ RECEIVE STAFF ACQ REQUEST CREATOR MANAGER REVIEWER</td>
</tr>
</tbody>
</table>
Delete an order item template (in case it is no longer valid for your library).

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.

Delete
users.

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.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
</table>

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

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>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>
<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></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Find a vendor.</td>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finish receiving an e-product</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

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

Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
</table>

order so that it is marked as completely received by the library.

Finish receiving a serial order so that it is marked as completely received by the library.

Modify the end date of an open (current or future) budget to adjust for changing fiscal cycles and budget periods or make simple corrections.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>to the time period of a budget.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Order a purchase request.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<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>
<td></td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perform all operations, including assigning roles to users.</td>
<td>x</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perform</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQ ADMIN</td>
<td>ACQ ORDER STAFF</td>
<td>ACQ READ ONLY</td>
<td>ACQ RECEIVE STAFF</td>
<td>ACQ REQUEST CREATOR</td>
<td>ACQ REQUEST MANAGER</td>
<td>ACQ REQUEST REVIEWER</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------</td>
<td>-----------------</td>
<td>---------------</td>
<td>-------------------</td>
<td>----------------------</td>
<td>----------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>item operations, like adding and editing items.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Place an order, submitting it to the vendor, if not done already.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publish a vendor to all libraries.</td>
<td></td>
<td></td>
<td></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></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read information about users, regardless of module (Circ, Acq, etc.)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive issue</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
Printed: Thu, 20 Feb 2020 19:43:46 GMT
### ROLES

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>for your library.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Receive outstanding monographs that have been ordered, but not yet received.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></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></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renew order items.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Request a price quote from a vendor for a group of items on an</td>
<td>x</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

Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
</table>

order.

Retrieve and view users.

Revert an invoice to 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).

The security context contains all the information about a given user (especially

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

Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST READER</th>
</tr>
</thead>
<tbody>
<tr>
<td>what actions they can perform). This permission allows the user to perform actions on behalf of another user (patron).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search invoices.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search items ordered.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Search and view order items</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Select and claim unreceived items and send a message to the vendor.

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.

Update a budget,
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>shortening or extending the end-date.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update information about other users, regardless of module (Circ, Acq, etc.)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update information about self via WorldCat Local/Discovery.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update institution configuration information relating to authentication and authorization.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Update serial issues for a title.</td>
<td>x</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

Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>with all libraries.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Upload a file and store it on the Shared File Service.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></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>
<td></td>
</tr>
<tr>
<td>Use the Forgot Password feature to get a new password.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View all product reports.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View a budget, including its start and end dates.</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View copy</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQ ADMIN</td>
<td>ACQ ORDER STAFF</td>
<td>ACQ READ ONLY</td>
<td>ACQ RECEIVE STAFF</td>
<td>ACQ REQUEST CREATOR</td>
<td>ACQ REQUEST MANAGER</td>
<td>ACQ REQUEST REVIEWER</td>
</tr>
<tr>
<td>----------</td>
<td>-----------</td>
<td>-----------------</td>
<td>---------------</td>
<td>-------------------</td>
<td>---------------------</td>
<td>--------------------</td>
<td>----------------------</td>
</tr>
</tbody>
</table>

and item-level holdings for their institution in WorldCat.

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

View information about a user's accounts. In some circumstances this may include identifying information about accounts external to

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

Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST</th>
<th>ACQ REQUEST</th>
<th>ACQ REQUEST</th>
<th>ACQ REQUEST</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCLC (e.g. where OCLC receives periodic patron updates from an external system, or where authentication is managed by an external system).</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View an invoice, including the vendor, invoice number, etc.</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View items on an invoice.</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View the logs of a vendor import/export process, such as the</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</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: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>process that begins when 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>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Roles and Actions

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ ADMIN</th>
<th>ACQ ORDER STAFF</th>
<th>ACQ READ ONLY</th>
<th>ACQ RECEIVE STAFF</th>
<th>ACQ REQUEST CREATOR</th>
<th>ACQ REQUEST MANAGER</th>
<th>ACQ REQUEST REVIEWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>the file.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View serial issues for a title.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>View a vendor.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x x x x</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ SENIOR ORDER STAFF</th>
<th>SELECTOR</th>
<th>SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access your institution's holdings.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<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></td>
</tr>
<tr>
<td>Add an item to an invoice after that item has already</td>
<td>x</td>
<td></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)
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ ORDER STAFF</th>
<th>SELECTOR</th>
<th>SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add issues to a binding unit</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add items to an invoice.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Add items to an order.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Allocate (or distribute) money into funds associated</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

been added to a previous invoice, so that they library can process and pay supplemental invoices received to cover adjusted costs for items.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACQ</td>
<td>ACQ SENIOR STAFF</td>
</tr>
</tbody>
</table>

with a budget. This changes the budgeted amount of the fund. User is also able to dis-allocate (or remove) money from the fund.

Allows 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.
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ SENIOR ORDER STAFF</th>
<th>SELECTOR</th>
<th>SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
</table>

Assign roles to other users. Create a user that automatically has the Everyone role assigned.

Can print labels.

Can select one or more issues from the "missing issues" list and claim them, optionally sending a notification to the Vendor.

Cancel order items, so that they can no longer...
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACQ SENIOR STAFF</td>
<td>ACQ SENIOR ORDER STAFF</td>
</tr>
</tbody>
</table>

be received.

| Change an invoice before it is paid. | x |
| Change items on an invoice before it is paid. | x |
| Change items on an order, before it has been placed. | x |
| Change the link from an item on order to the WorldCat record, in case the wrong WorldCat record or item was selected. | x | x |
Change an open (unsubmitted) purchase order. It does not allow editing the items on the order.

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.

Close the budget
<table>
<thead>
<tr>
<th>ACTION for the current fiscal cycle, including transferring any open encumbrances to the next fiscal cycle.</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete binding of a binding unit</td>
<td>x x</td>
</tr>
<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>
<td></td>
</tr>
<tr>
<td>Create</td>
<td>x x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQ SENIOR STAFF</td>
</tr>
<tr>
<td>---------</td>
<td>------------------</td>
</tr>
<tr>
<td>a binding unit</td>
<td></td>
</tr>
<tr>
<td>Create a budget for a future time period.</td>
<td></td>
</tr>
<tr>
<td>Create, edit and delete copy and item-level holdings for their institution in WorldCat.</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</td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ACQ SENIOR STAFF</td>
</tr>
<tr>
<td>--------</td>
<td>------------------</td>
</tr>
<tr>
<td>vendor for import into Acquisitions.</td>
<td></td>
</tr>
<tr>
<td>Create a fund for a budget.</td>
<td>x</td>
</tr>
<tr>
<td>Create an invoice.</td>
<td></td>
</tr>
<tr>
<td>Create new serial issues for a title.</td>
<td></td>
</tr>
<tr>
<td>New issues are shared with all libraries.</td>
<td>x</td>
</tr>
<tr>
<td>Create a purchase order.</td>
<td>x</td>
</tr>
<tr>
<td>Create users, regardless of module (Circ, Acq, etc.)</td>
<td></td>
</tr>
<tr>
<td>Create a vendor.</td>
<td>x</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
Printed: Thu, 20 Feb 2020 19:43:46 GMT
# Roles

<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ SENIOR ORDER STAFF</th>
<th>SELECTOR</th>
<th>SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete a binding unit</td>
<td>x</td>
<td>x</td>
<td></td>
<td></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></td>
<td></td>
<td></td>
<td></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>
<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>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delete an item from an open (unplaced) purchase order, in case</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
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACQ senior staff</td>
<td>ACQ senior order staff</td>
</tr>
<tr>
<td>select serials admin</td>
<td>serials binding staff</td>
</tr>
<tr>
<td>serials claim</td>
<td>serials receive</td>
</tr>
<tr>
<td>vic admin</td>
<td>vic manager</td>
</tr>
</tbody>
</table>

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
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ SENIOR ORDER STAFF</th>
<th>SELECTOR SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM STAFF</th>
<th>SERIALS RECEIVE STAFF</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete users.</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 for processing by Partner Exchange Services.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit a binding unit</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit public vendors (indicated by globe icon) and the public data for this Vendor, including name, country,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
</tr>
</tbody>
</table>

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ SENIOR ORDER STAFF</th>
<th>SELECTOR ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROLES</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>etc.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit vendor data for your library only.</td>
<td></td>
<td></td>
<td></td>
<td></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 enabling a future budget for use.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: The availability of

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

Printed: Thu, 20 Feb 2020 19:43:46 GMT
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
Find a vendor.

Finish receiving an e-product order so that it is marked as completely received by the library.

Finish receiving a serial order so that it is marked as completely received by the library.

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.

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.

Perform all operations,
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ SENIOR ORDER STAFF</th>
<th>SELECTOR</th>
<th>SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>including assigning roles to users.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perform item operations, like adding and editing items.</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Place an order, submitting it to the vendor, if not done already.</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publish a vendor to all libraries.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>x</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>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read information about users, regardless</td>
<td></td>
<td></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
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>of module (Circ, Acq, etc.)</td>
<td><strong>ACQ SENIOR STAFF</strong></td>
</tr>
<tr>
<td>Recall a binding unit from the bindery</td>
<td>x</td>
</tr>
<tr>
<td>Receive issue for your library.</td>
<td>x</td>
</tr>
<tr>
<td>Receive outstanding monographs that have been ordered, but not yet received.</td>
<td>x</td>
</tr>
<tr>
<td>Remove a vendor from your list of active partners (in Acquisitions or License Manager).</td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ROLES</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>Renew order items.</td>
<td>x</td>
</tr>
</tbody>
</table>

Request a price quote from a vendor for a group of items on an order.

Retrieve and view users.

Revert an invoice to un-payed state in order to correct mistakes and thus alter the corresponding budget expenditures (This feature is not allowed)
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACQ SENIOR STAFF</td>
<td>ACQ SENIOR ORDER STAFF</td>
</tr>
</tbody>
</table>

for invoices that use a closed budget).

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).

<p>| Search invoices. | x |
| Search items ordered. | x |
| Search and | x |</p>
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>view open orders that have not yet been placed with the vendor.</td>
<td>ACQ SENIOR STAFF</td>
</tr>
<tr>
<td>Search and view order items</td>
<td>x</td>
</tr>
<tr>
<td>Select and claim unreceived items and send a message to the vendor.</td>
<td>x</td>
</tr>
<tr>
<td>Send a binding unit to the bindery</td>
<td>x</td>
</tr>
<tr>
<td>Start receiving an eProduct, so that the library can record the</td>
<td>x</td>
</tr>
<tr>
<td>ACTION</td>
<td>ROLES</td>
</tr>
<tr>
<td>--------</td>
<td>-------</td>
</tr>
<tr>
<td></td>
<td>ACQ SENIOR STAFF</td>
</tr>
</tbody>
</table>

- 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

- Update a budget, shortening or extending the end-date. 
  - x

- Update information about other users, regardless of module (Circ, Acq, etc.)

---

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

Printed: Thu, 20 Feb 2020 19:43:46 GMT
information about self via WorldCat Local/Discovery.

Update institution configuration information relating to authentication and authorization.

Update serial issues for a title. Issue updates are shared with all libraries.

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

Upload MARC files from a vendor to be imported

https://help.oclc.org/Library_Management/WorldShare_Acquisitions/Get_started/Account_roles
Printed: Thu, 20 Feb 2020 19:43:46 GMT
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACQ SENIOR STAFF</td>
<td></td>
</tr>
<tr>
<td>ACQ SENIOR ORDER STAFF</td>
<td></td>
</tr>
<tr>
<td>SELECTOR ORDER STAFF</td>
<td></td>
</tr>
<tr>
<td>SERIALS ADMIN</td>
<td></td>
</tr>
<tr>
<td>SERIALS BINDING STAFF</td>
<td></td>
</tr>
<tr>
<td>SERIALS CLAIM</td>
<td></td>
</tr>
<tr>
<td>SERIALS RECEIVE</td>
<td></td>
</tr>
<tr>
<td>VIC ADMIN</td>
<td></td>
</tr>
<tr>
<td>VIC MANAGER</td>
<td></td>
</tr>
</tbody>
</table>

into Acquisitions.

Use the Forgot Password feature to get a new password.

View all product reports.

View a binding unit

View a budget, including its start and end-dates.

View copy and item-level holdings for their institution in WorldCat.

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

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...
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ROLE</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ ORDER STAFF</th>
<th>SELECTOR ADMIN</th>
<th>SERIALS ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>View an invoice, including the vendor, invoice number, etc.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View items on an invoice.</td>
<td>x</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

where authentication is managed by an external system).
<table>
<thead>
<tr>
<th>ACTION</th>
<th>ACQ SENIOR STAFF</th>
<th>ACQ SENIOR ORDER STAFF</th>
<th>SELECTOR ADMIN</th>
<th>SERIALS BINDING STAFF</th>
<th>SERIALS CLAIM</th>
<th>SERIALS RECEIVE</th>
<th>VIC ADMIN</th>
<th>VIC MANAGER</th>
</tr>
</thead>
<tbody>
<tr>
<td>View My Library and export data.</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td></td>
</tr>
<tr>
<td>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.</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View serial issues for a title.</td>
<td>x</td>
<td>x</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>View a vendor.</td>
<td>x</td>
<td>x</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
Printed: Thu, 20 Feb 2020 19:43:46 GMT