Acquisitions Skills Checklist

Minimum Requirements

1. Be familiar with the **WYLD Support** page (http://library.wyo.gov/wyld/support) and the help available including **Acquisitions technotes** (https://wyldlibraries.freshdesk.com/support/solutions/61000133605)
2. Be familiar with settings in the **Session Settings wizard** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000283734-session-settings-wizard) and how these settings affect the behavior of other wizards in the Acquisitions module.
3. Understand the Acquisitions workflow: create order (through 'Add Order' wizards or 9xx ordering), receive and load order lines, invoice order lines (optional), and add items to the catalog (through the Add Ordered Items to Catalog wizard, TS2bibload report, or Cataloging wizards).
4. Be familiar with the steps involved when creating an order manually including searching for and adding titles, entering PO number, choosing order type, selecting vendor and fiscal cycle, and entering the number of copies, price, and selecting funds and holding codes (distribution information).
5. For those who use 9xx ordering, understand the steps involved by reviewing **the 9XX Ordering technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000283589-9xx-ordering).
6. In order to search for and add titles to an order record, it is essential to understand the components of bibliographic records.
7. When selecting a title record for an order, be able to identify the appropriate record (monograph vs. serial) and record content (author, title, publisher, copyright date, physical description, etc.).
8. In order to add a new title record to an order, it is essential to be able to configure SmartPort settings (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285439-smartport-property-settings).
9. When adding a title record to an order, it is essential to be able to add or request records from LC or OCLC through SmartPort. Also, know how to overlay an already existing record in the WYLD database through SmartPort. See the **Overlaying Using SmartPort technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285444-overlaying-records-using-smartport) and additional SmartPort technotes for more information.
10. If you choose not to select a title record from the database or through SmartPort when creating an order, know how to add a temporary title record (using the Temporary Title helper) according to MARC Format. These temporary records must be resolved at a later date.
11. Know how to identify and resolve temporary on-order records (e.g., auto-generated call number, item barcode). These records either need to be removed, enhanced to level 2 of bibliographic description, or overlaid with records from LC or OCLC. For information about how to identify temporary on-order records, please see the following technotes**: Identifying Baker and Taylor Order Records** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285524-identifying-baker-taylor-on-order-records), **Identifying Ingram Order Records** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285528-identifying-ingram-on-order-records) and **Midwest Tape AV Order Records** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285529-identifying-midwest-tape-on-order-records) .
12. Know *MARC Format* and ***WYLD Cataloging Standards*** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285219-wyld-cataloging-standards).
13. Know how to create, modify, and remove a basic order.
14. Understand and use appropriate holding codes.
15. Know how to receive an order line.
16. Know how to load an order line (enter a date loaded).
17. Know the difference between an open and closed (complete) order line.
    *Hint: An order line is "closed" if a date is entered for both the "Date received" and "Date loaded" fields under the Segments tab of the order line record.

18. Understand the importance of closing order lines in order to reduce error messages when removing items. See the **Receive Orders Wizard technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285240-receive-orders-wizard) for more information.
19. Be familiar with the three ways to create an item record for an ordered item: the Add Ordered Items to Catalog wizard, Cataloging wizards (e.g., Add Item and Call Number and Item Maintenance wizard), and load bibliographic records reports (e.g., TS2bibload report).
20. Know when to contact the WYLD Office for help.

Intermediate Requirements

1. Know how to create, modify, and remove vendors and funds.
2. Know how to create, modify, pay, and remove invoices.
3. Know how to rollover funds, vendors, and orders to a new fiscal year.
4. Understand fund terminology, such as encumbrance, expenditure, free balance, and cash balance. See the **Display Fund (Specific Cycle) Wizard technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000285042-display-fund-specific-cycle-wizard).
5. Know the differences between the types of orders that can be placed: basic (approval, firm, gift), dated (membership, subscription), and recurring (blanket, standing order, monographic serial).
6. Know the difference between cancelling and deleting order lines.
7. Know how to place recurring and dated orders.

Expert Requirements

1. Able to edit vendor MARC records (used for 9XX ordering) using MarcEdit or similar MARC record editing program.
2. Know how to break the link between a title and an order line. See the **Using the Change Title Link Helper technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000287429-using-the-change-title-link-helper).
3. Know how to change the title link for an order line from one item to another. See the **Using the Change Title Link Helper technote** (https://wyldlibraries.freshdesk.com/support/solutions/articles/61000287429-using-the-change-title-link-helper).

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