Acquisitions Skills Checklist

Importing/Linking Requirements

1. Identify appropriate record (monograph vs. serial, author, title, publisher, copyright date, physical description, etc.)
2. Understand the components of bibliographic records
3. Understand and know the steps of 9xx ordering

Minimum Requirements

1. Know the General Skills and be signed up for the appropriate distribution list
2. Know MARC Format and WYLD Cataloging Standards
3. Be familiar with the WYLD Support page and the helps available including Acquisitions technotes
4. Be able to configure SmartPORT settings in order to add or request records from LC or OCLC
5. Add a temporary record according to MARC Format using the Acquisitions On Order Template;
6. Add or request records from LC or OCLC and be able to overlay existing temporary records from LC or OCLC
7. Know the different types of orders that can be placed: basic (approval, firm, gift), dated (membership, subscription), and recurring (blanket, standing order, monographic serial)
8. Understand linking versus loading (See the Add Ordered Items to Catalog Wizard technote)
9. Understand and use appropriate Holding Codes.
10. Know how to create, modify and remove the following:
    a. Basic orders
    b. Vendors
    c. Funds
11. Know how to create, modify, pay and remove invoices
12. Know how to receive an orderline
13. Know how to load an orderline (enter a date loaded)
14. Know the difference between an open and closed (complete) orderline. *Hint: An orderline is “closed” if a date is entered for both the “Date received” and “Date loaded” fields under the Segments tab on the orderline record
15. Know how to rollover to a new fiscal year
16. Know how to access context sensitive online helps
17. Know when to contact the WYLD Office.
Intermediate Requirements

1. Understand fund terminology, such as encumbrance, expenditure, free balance, and cash balance. (See the Display Fund (Specific Cycle) Wizard technote)
2. Be familiar with the three ways to create an item record for an ordered item including 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)
3. Know how to remove volumes or copies from orderlines and the catalog
4. Know how to place recurring and dated orders

Expert Requirements

1. Know how to locate and resolve temporary (on-the-fly) records that either need to be removed, enhanced to level 2 of bibliographic description, or overlaid with records from LC or OCLC
2. Understand and manage reports using Reporting Skills Checklist
3. Understand and manage reports using Analytics Skills Checklist

Originally created by the WYLD Network Training Committee

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