Sitka’s Evergreen Acquisitions Documentation

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Evergreen 3.9

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Introduction

Chapter 1. An Introduction to Acquisitions

The Acquisitions Module allows your library to track funds and purchases through the Evergreen Integrated Library System.

NOTE	The Acquisitions module is an add-on service with additional costs. Please contact Sitka Support for information regarding adding this module.

Before beginning to use Acquisitions, the Acquisitions initial setup must be completed by the Acquisitions administrator:. Refer to Acquisitions Module Configuration for details.

Chapter 2. New Features in Evergreen Acquisitions Version 3.9

2.1. Administration

The acquisitions administration interfaces have been updated and in some cases consolidated.

- The four claiming interfaces have been consolidated into one tabbed interface.
- Currencies and exchange rates are now a single interface, making it easier for libraries to view current exchange rates and for Co-op Support to manage exchange rates for different currencies for libraries.
- The distribution forumulas interface has been re-designed.
- Funding sources, funds, and fund tags have been re-designed and consolidated into a tabbed Fund Administration interface.
- Funding sources now have an active flag so you can mark funding sources that are no longer in use as inactive.

Chapter 3. Recommended Workflows

The Evergreen Acquisitions module is flexible and can accommodate many different Acquisitions procedures. The workflows discussed in this chapter are recommend for Sitka's Acquisitions libraries.

3.1. Workflow: Upload MARC Records

NOTE	**Sitka's Enhanced On Order Record workflow** - This workflow should be followed by libraries that download brief Marc records from their provider's website. This workflow assumes you have been setup for EDI.

Select

1. Create a cart on your provider's website and add the desired items to the cart.
    a. Assign line item templates while adding items to the cart.
2. Download the MARC records for the items in the cart.
    a. Save the .mrc file on your computer. It's important to remember where you save it.
3. Do NOT submit the cart as an order to your provider via their website.
    a. **After** you have successfully created your purchase order in Evergreen you can go back to the vendor website and clear your cart.

Order

1. Upload the MARC record file downloaded from the provider's website.
    a. Refer to Load MARC Order Records for details.
2. View Purchase Order
    a. When your Purchase Order has finished loading, click **View Purchase Order**.
        i. It may take a while for the **View Purchase Order** link to appear. Unless you get an error message the order is loading do NOT start the upload again.
        ii. Wait a few minutes if the link does not appear **Search** for your pending purchase orders.
3. Once your purchase order is displayed on screen verify
    a. **Total Line Items**
    b. **Total Estimated**
4. Prepare Purchase Order for Activation
    a. Enter a Purchase Order name according to provider naming conventions
        i. Click **Name** enter a unique name.
        ii. Example for ULS orders use **LIBRARYMMDD**. *MPL0518*
    b. Check the line item attributes and make any changes
        i. Click **Expand All** to view line item details
        ii. Refer to Line Items for details.

5. Activate Purchase Order
    a. Click **Activate Order**
    b. Refer to Activate Purchase Order for details.
6. View EDI Messages
    a. Evergreen will automatically send the order to your vendor via EDI
    b. Refer to EDI for details.

Invoice & Receive

1. Open the box
2. Find the Invoice
    a. Verify that all the items on the invoice are in the box
3. Search in Evergreen using **Vendor Invoice ID**
    a. Refer to search by invoice ID for details.
4. Receive items
    a. Click **Receive Items** button on the invoice.
    b. Refer to Receive Items on the Invoice for details.
5. Verify Totals
    a. Edit Billed / Total amounts in Evergreen to match the paper invoice.
6. Add Charges
    a. Click **Add Charge** to add lines for invoice charges such as shipping fee, processing fees or taxes.
    b. Refer to Invoice Item Types for details.
7. Close the Invoice
    a. Click **Close**
    b. Refer to Close an Invoice for details.
8. Information is forwarded to finance department/bookkeeper.

Catalogue

1. Update existing On Order copies
    a. Use ISBN to search the catalogue to find your item
    b. Refer to Numeric Search for details.
2. Click **Edit** beside the item's temporary barcode.
    a. Update Volume/Copy information for each item.
    b. Refer to Editing a Copy from OPAC View
3. Use Z39.50 to overlay the brief record with a full record or do original cataloguing to replace brief bibliographic records.
    a. Refer to Overlay records via Z39.50 for details.

4. Process items.
    a. As per your libraries processing specifications.
5. Check in items.
    a. Items are now ready to circulate.

3.2. Workflow: Order Shelf Ready Items

NOTE	**Sitka's Shelf Ready Items workflow** - This workflow should be followed by libraries that order Shelf Ready Items. This workflow assumes you have been setup for EDI.

Select

1. Create a cart on your provider's website and add the desired items to the cart.
    a. Assign line item templates while adding items to the cart.
2. Download the MARC records for the items in the cart.
    a. Save the .mrc file on your computer. It's important to remember where you save it.
3. Do NOT submit the cart as an order to your provider via their website.
    a. **After** you have successfully created your purchase order in Evergreen you can go back to the vendor website and clear your cart.

Order

1. Upload the MARC record file downloaded from the provider's website.
    a. Refer to Load MARC Order Records for details.
2. View Purchase Order
    a. When your Purchase Order has finished loading, click **View Purchase Order**.
    b. It may take a while for the **View Purchase Order** link to appear. Unless you get an error message the order is loading do NOT start the upload again.
    c. Wait a few minutes if the link does not appear search for your pending purchase orders.
3. Once your purchase order is displayed on screen verify
    a. **Total Line Items**
    b. **Total Estimated**
4. Prepare Purchase Order for Activation
    a. Enter a Purchase Order name according to provider naming conventions
        i. Click **Name** enter a unique name.
        ii. Example for ULS orders use **LIBRARYMMDD**. *MPL0518*
    b. Check the line item attributes and make any changes
        i. Click **Expand All** to view line item details
        ii. Refer to Line Items for details.

5. Activate Purchase Order
    a. Refer to Activate Purchase Order for details.
6. View EDI Message
    a. Evergreen will automatically send the order to your vendor via EDI
    b. Refer to EDI for details.

Invoice and Receive

1. Open the box
2. Find the Invoice
    a. Verify that all the items on the invoice are in the box
    b. Verify all the items have been processed (Barcodes & Spine labels)
3. Check the Status of the items
    a. Scan an item barcode into Item Status → verify the item is "In process"
    b. If the item status is On order wait 48 hours and try again
    c. If the item status is still shows On order after 48 hours email sitka@bc.libraries.coop
4. Search in Evergreen using **Vendor Invoice ID**
    a. Refer to search by invoice ID for details.
5. Receive items
    a. Click **Receive Items** button on the invoice.
    b. Refer to Receive Items on the Invoice for details.
6. Verify Totals
    a. Edit Billed / Total amounts in Evergreen to match the paper invoice.
7. Add Charges
    a. Click **Add Charge** to add lines for invoice charges such as shipping fee, processing fees or taxes.
    b. Refer to Invoice Item Types for details.
8. Close the Invoice
    a. Click **Close**
    b. Refer to Close an Invoice for details.
9. Information is forwarded to finance department/bookkeeper.

Catalogue

1. Use Item Status to verify the completeness of the item attributes.
    a. Barcode
    b. Call Number
    c. Shelving Location
    d. Circulation Modifier

2. Verify the completeness of the MARC record and adds additional information if required.
    a. See Maintaining Bibliographic records for details.
3. Check in items.
    a. Items are now ready to circulate.

3.3. Workflow: Order from the Catalogue

NOTE	**Sitka's Create Purchase Order from Scratch workflow** - This workflow should be followed by libraries when brief On Order records are not available from the provider. This workflow assumes you are placing the order on the providers website (Amazon, etc.).

Select

Using existing bibliographic records from the Sitka catalogue you can add line items to a Purchase Order in four ways

1. Click **View/Place Order** in Record Summary.
    a. Refer to View/Place Order for details.
2. Load Catalog Record IDs.
    a. Refer to Load Catalog Record IDs for details.
3. MARC Federated Search.
    a. Refer to MARC Federated Search for details.
4. Add Brief Records.
    a. Refer to Add Brief Records for details.

Order

1. Open Purchase Order
    a. Search for your pending purchase orders.
2. Add Copies
    a. Refer to Add Copies to a Line Item for details.
3. Activate Purchase Order
    a. Refer to Activate Purchase Order for details.

Invoice and Receive

1. Create an invoice from a purchase order or from a line item.
2. Link Selected Line Items to Invoice.
3. Receives Line Items.
4. Add Charges
    a. Click **Add Charge** to add lines for invoice charges such as shipping fee, processing fees or taxes.

b. Refer to Invoice Item Types for details.

5. Close the Invoice
   a. Click **Close**
   b. Refer to Close an Invoice for details.
6. Information is forwarded to finance department/bookkeeper.

Catalogue

1. Update existing On Order copies
   a. Use ISBN to search the catalogue to find your item
   b. Refer to Numeric Search for details.
2. Click **Edit** beside the item's temporary barcode.
   a. Update Volume/Copy information for each item.
   b. Refer to Editing a Copy from OPAC View
3. Use Z39.50 to overlay the brief record with a full record or do original cataloguing to replace brief bibliographic records.
   a. Refer to Overlay records via Z39.50 for details.
4. Process items.
   a. As per your libraries processing specifications.
5. Check in items.
   a. Items are now ready to circulate.

3.4. Workflow: Blanket Orders

NOTE

Sitka's Blanket Order workflow

This workflow should be followed by libraries that want to track money spent on Blanket Orders. This workflow The work flow supported by this development assumes staff does not need to track the individual contents of the order, only the amounts encumbered and invoiced in bulk.

Blanket orders allow staff to invoice an encumbered amount multiple times, paying off the charge over a period of time.

Select

1. Items selected based on Blanket/Standing Order criteria
   a. Selection is not completed in Sitka's Evergreen

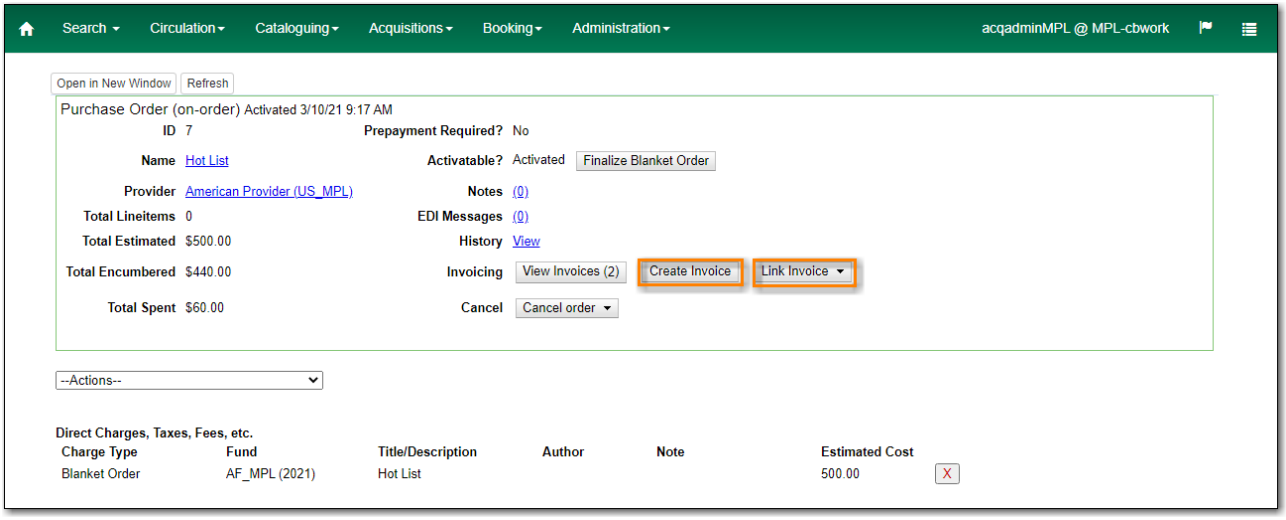
Order

1. Click **Acquisitions → Create Purchase Order**
2. Choose the Ordering Agency.
3. Enter a Purchase Order Name.

4. Enter the Provider code.
5. Click **Save**.
6. Click **New Charge**.
7. Choose Blanket Order from the Charge Type drop down menu.
8. Choose a Fund from the Fund drop down menu.
9. Enter the Estimated Cost for the blanket order.
10. Click Save New Charges
11. Click Activate Order
    a. Refer to Activate Purchase Order for details.

Invoice

1. Click **Acquisitions → Purchase Orders**
2. Search for your Purchase Order (by name, by open etc)
3. From the purchase order screen, you can either **Create Invoice** or **Link Invoice**



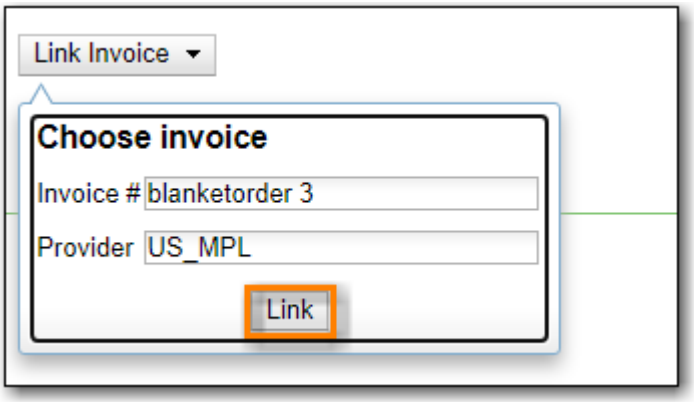
Create Invoice

1. Click **Create Invoice**
2. Enter the Invoice information. Refer to Invoice details for details.
3. Enter the amount billed into the Billed field.
    a. The Paid field will auto-fill to match.
4. Enter an optional Title / Description.
5. Click **Save**.
6. Click **Close** to close the invoice.

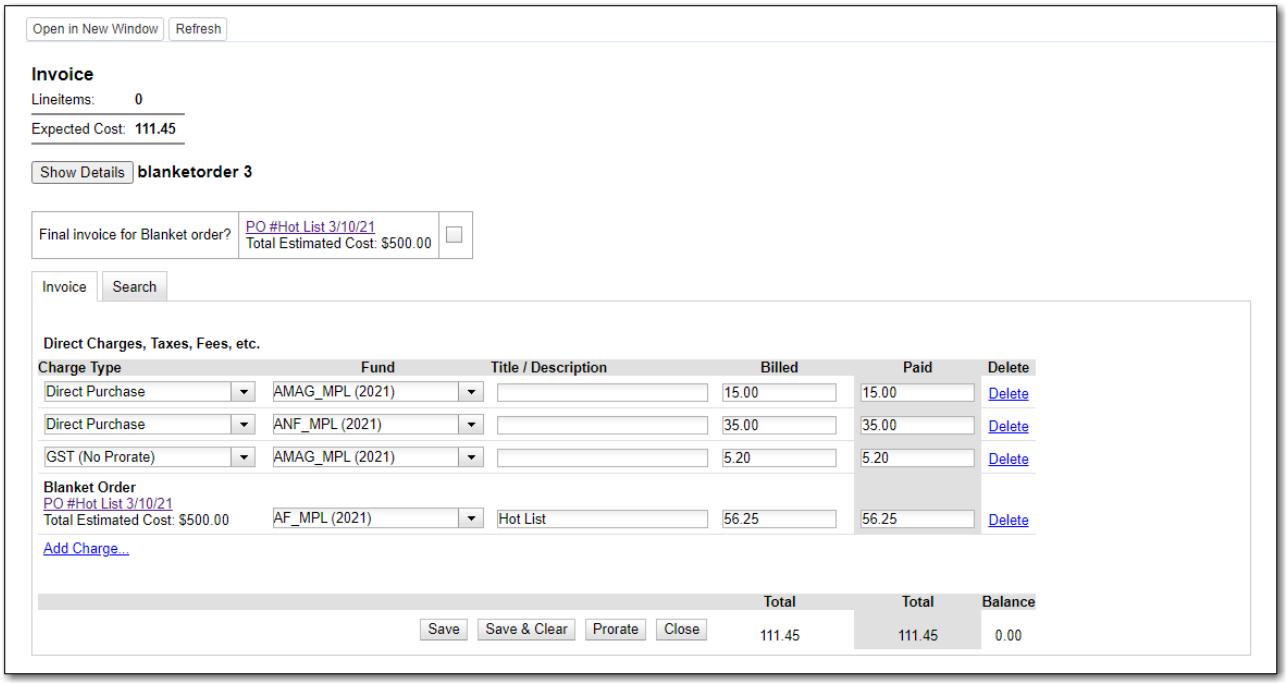
Link Invoice

1. Click **Link Invoice**
2. Enter the Invoice #
3. Enter the Provider

4. Click **Link**.

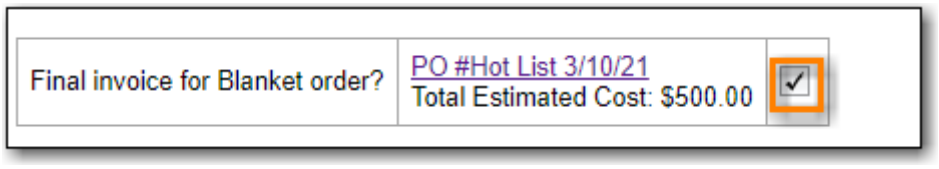


5. Enter the amount billed into the Billed field.
    a. The Paid field will auto-fill to match.
6. Enter an optional Title / Description.
7. Click **Save**.
8. Click Close to close the invoice.



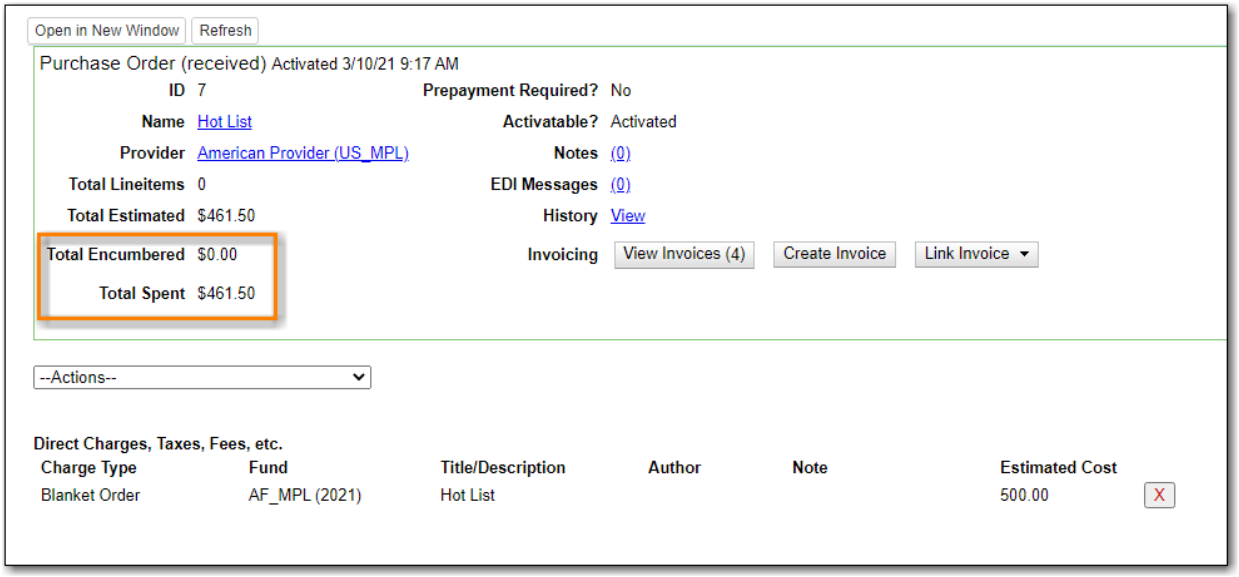
Final Invoice

1. Check the **Final Invoice for Blanket Order** checkbox.



2. Enter the amount billed into the Billed field.
    a. The Paid field will auto-fill to match.
    b. The Fund will auto-populate with the Fund used on the Purchase Order.

3. Enter an optional Title / Description.
4. Click **Save**.
5. Click Close to close the invoice.
    a. The Purchase Order will be marked as received and any remaining encumbrances set to $0.00.



Catalogue

1. Retrieve bibliographic record from the catalogue, Import a record from Z39.50 or do original cataloguing.
2. Add Volume/Copy.
3. Process items.
4. Check in items.

3.5. Workflow: Invoice Only

NOTE

Sitka's Invoice Only workflow

This workflow should be used by libraries that want to track money spent on items not ordered via Evergreen.

Select

1. Not completed in Sitka's Evergreen

Order

1. Not completed in Sitka's Evergreen

Invoice

1. Click **Acquisitions → Create Invoice**
2. Add Charges for Direct Purchases
    a. Click **Add Charge** to add lines for Direct Purchase charges.

3. Add Charges
    a. Click **Add Charge** to add lines for invoice charges such as shipping fee, processing fees or taxes.
    b. Refer to Invoice Item Types for details.
4. Close the Invoice
    a. Click **Close**
    b. Refer to Close an Invoice for details.
5. Information is forwarded to finance department/bookkeeper.

Catalogue

1. Retrieve a matching bibliographic record from the catalogue, Import a new record from Z39.50 or do original cataloguing.
    a. Refer to the Cataloguing Part of Sitka's Evergreen Documentation for details.
2. Add Volume/Copy.
    a. Refer to the Add Holdings Chapter of Sitka's Evergreen Documentation for details.
3. Process items.
    a. As per your libraries processing specifications.
4. Check in items.
    a. Items are now ready to circulate.

NOTE	Cataloguing is only required if you want to add the items to the database.

Acquisitions

Chapter 4. Acquisitions Search

4.1. General Search

Sitka's Evergreen Acquisitions Video - General Search (1:22)

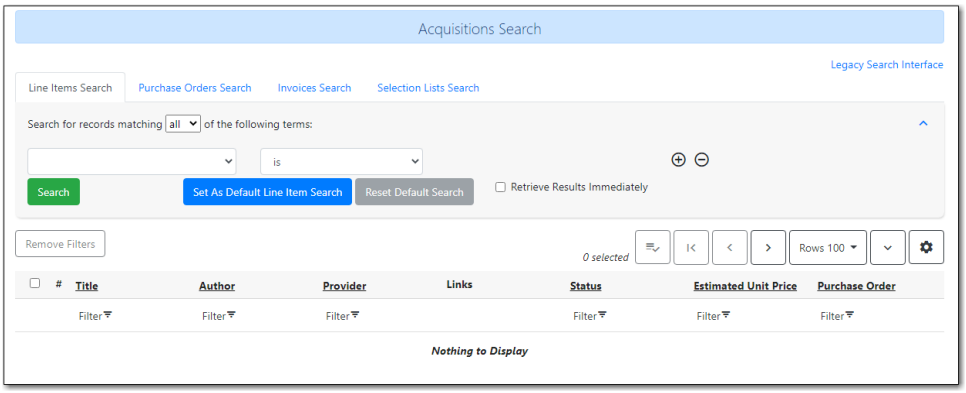
The Acquisitions Search interface provides a centralized place for searching Line Items, Purchase Orders, Invoices, and Selection Lists.

1. Click **Acquisitions** → **General Search**.

4.2. Line Items Search

The Acquisitions Search interface defaults to the Line Items Search tab. Here you can search across the entire acquisitions module (selection lists, purchase orders, and invoices) to find line items matching your search terms. There is not an initial default search for this tab. Users must create their search or set a default line item search.

1. Select your search field(s) and enter your search term(s).
2. Click **Search**



The search results consist of line items and provide links to the provider account, bibliographic record in the catalog, associated purchase order, purchase requests, and any associated invoices. Clicking on the linked Lineitem ID will bring you to the highlighted line item on the associated purchase order. All links open in a new tab.

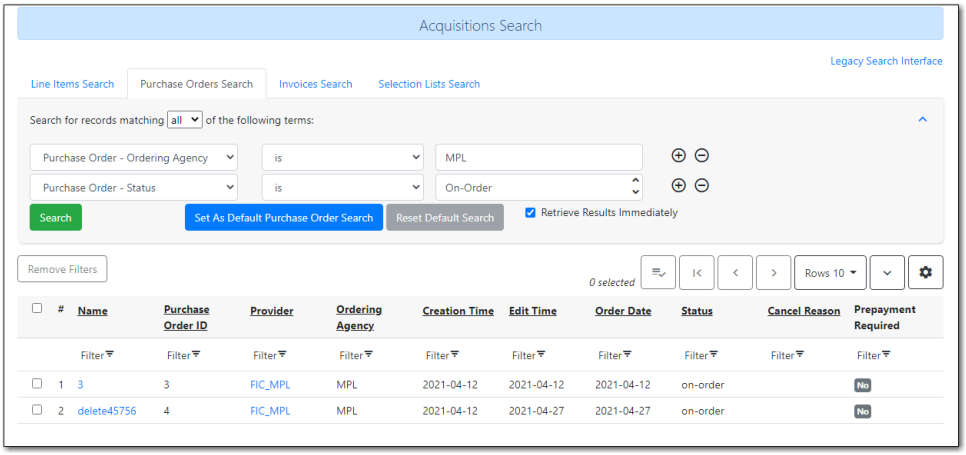
NOTE	Currently no actions can be taken with Line Item search results. The full integration of action functionality will be added by pending development to the acquisitions module.

4.3. Purchase Orders Search

The Purchase Orders Search tab allows you to conduct a search of Purchase Orders. The default search that appears when the tab is viewed is a search for all purchase orders that are in the status of on order at your library:

Search for On-Order purchase orders

1. Purchase Order - Ordering Agency is [your library]
2. Purchase Order - Status is [On-Order]
3. Click **Search**.



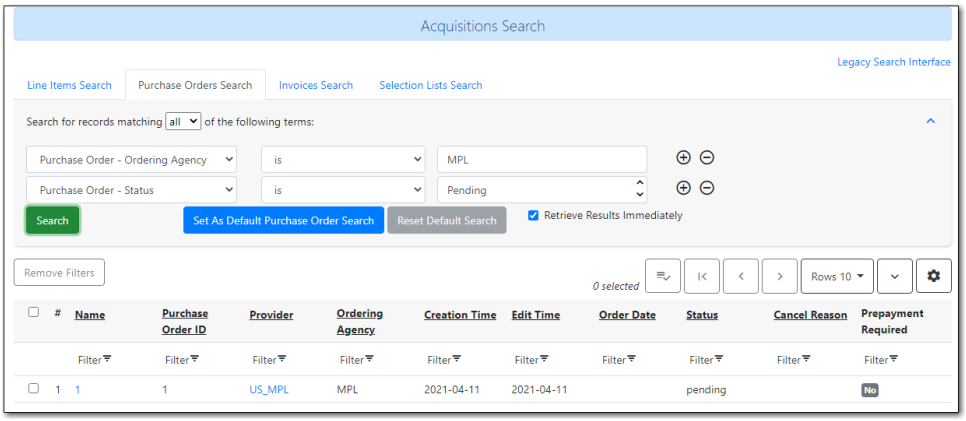
The search results will consist of purchase orders and provide links to the purchase order and the associated provider account. All links open in a new tab.

You can construct a new one-time search instead of using the default search or set a default purchase order search that will replace the default search described above. If a user sets a new default Purchase Orders search, that search will be populated automatically when Acquisitions → Purchase Orders is selected from the main menu.

You can modify the default purchase order search to generate a list of pending purchase orders.

Search for Pending purchase orders

1. **Acquisitions → Purchase Orders**
2. Purchase Order - Ordering Agency is [your library]
3. Purchase Order - Status is [Pending]
4. Click **Search**.

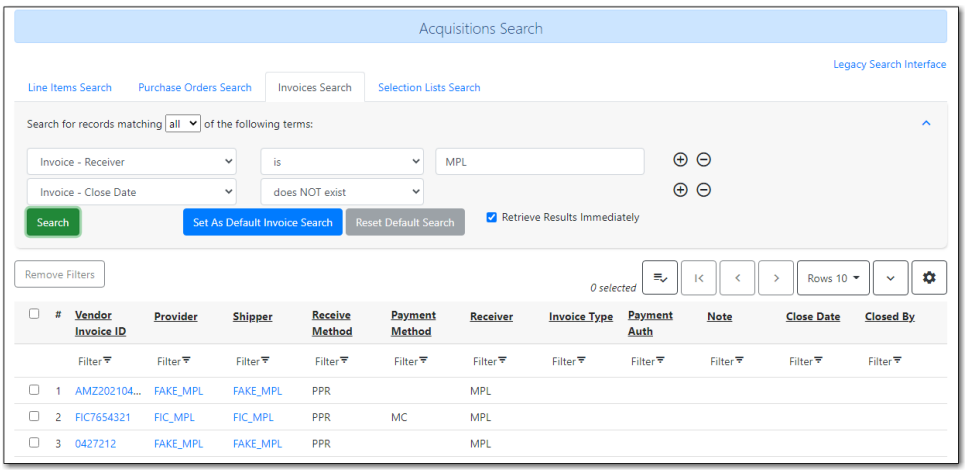


4.4. Invoices Search

The Invoices Search tab allows you to conduct a search of Invoices. The default search that appears when the tab is viewed is a search for all open invoices at your library.

Search for open invoices

1. Invoice - Receiver is [your library]
2. Invoice - Close Date is [unset - no date].
3. Click **Search**.



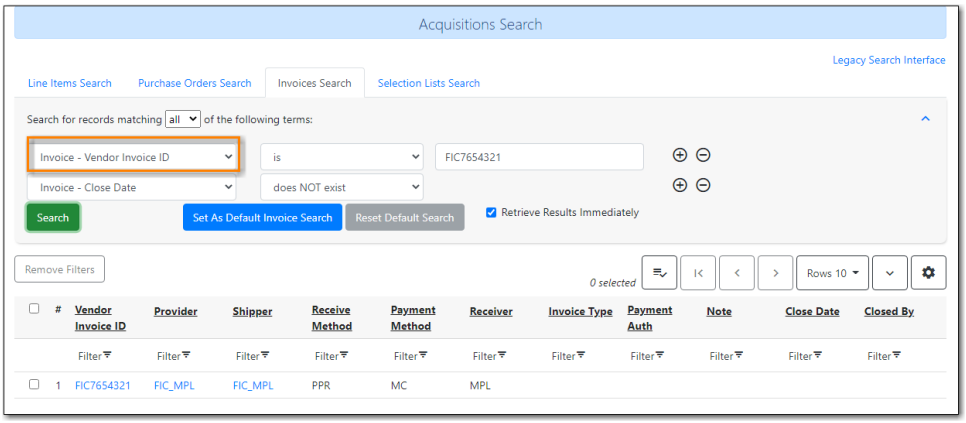
The search results consist of invoices and provide links to the invoice, the provider account, and the shipper account associated with the invoice. All links open in a new tab.

You can construct a new one-time search instead of using the default search or set a default invoice search that will replace the default search described above. If a user sets a new default Invoices search, that search will be populated automatically when Acquisitions → Invoices is selected from the main menu.

Search for a specific invoice by vendor invoice ID

1. Click **Acquisitions → Invoices**.
2. Choose **Invoice-Vendor Invoice ID** from the drop down menu.

3. Enter the invoice ID found on the paper invoice.
4. Click **Search**.

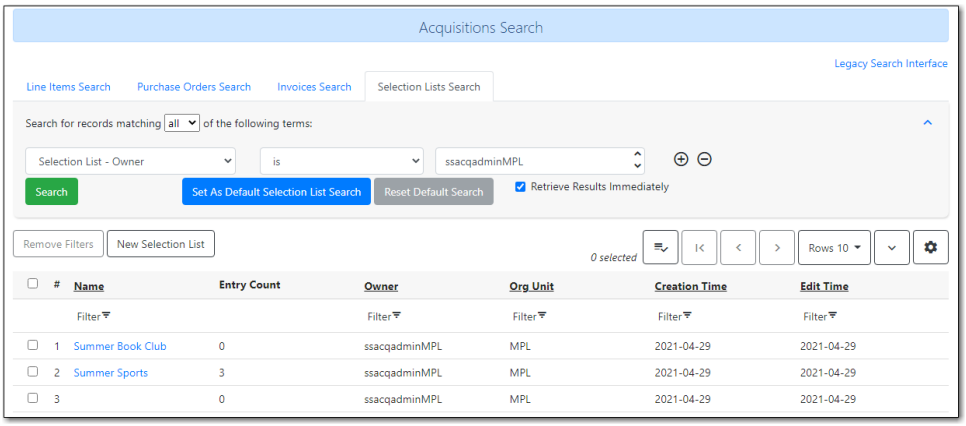


4.5. Search for Selection Lists

The Selection Lists Search tab allows you to conduct a search of selections lists. The default search that appears when the tab is viewed is a search for all selection lists owned by the currently logged in user.

Search for your Selection Lists

1. Selection List - Owner is [currently logged in user]
2. Click **Search**.



The search results will consist of selection lists and provide a link to the selection list via the Name column.

4.6. Creating a New Default Search

In each of the Acquisitions Search tabs you can create a custom default search that will override the standard default search for the tab.

Create a new default search

1. Construct your custom search using the drop down menus in the selected search tab. Click the (+) to add a new field to your search and click the (-) to remove a field from your search.
2. Click the blue button that says Set As Default [Line Item/Purchase Order/Invoice/Selection List] Search. You will see a green message in the lower right hand corner confirming that your default search was saved.
3. This search will now load each time you view the selected tab and will override the default search listed above.

There is also an option to automatically execute the search when the tab is opened, eliminating the need to click the Search button. This can be done by checking the box to Retrieve Results Immediately and then clicking the Set As Default … Search button.

Both the custom default search and the selection to retrieve results immediately are saved to the workstation.

If you wish to reset a search tab to its defaults, click the Reset Default Search button.

4.6.1. Search Syntax and Filters

To create your search, choose if your search should match *all* or *any* of the search terms you use in your search. Selecting *all* will conduct a stricter search that must match all of the search terms you indicate. Selecting *any* will return search results that match any of the search terms you indicate.

Next, select a search attribute from the drop down menu. This menu provides search options related to line items, purchase orders, selection lists, and invoices; the search results will return relevant line items.

The search entry box will display a controlled list of values via a dropdown menu when available. You will see this when searching for an org unit, owner, state, status, and provider, among others. Search is case-insensitive.

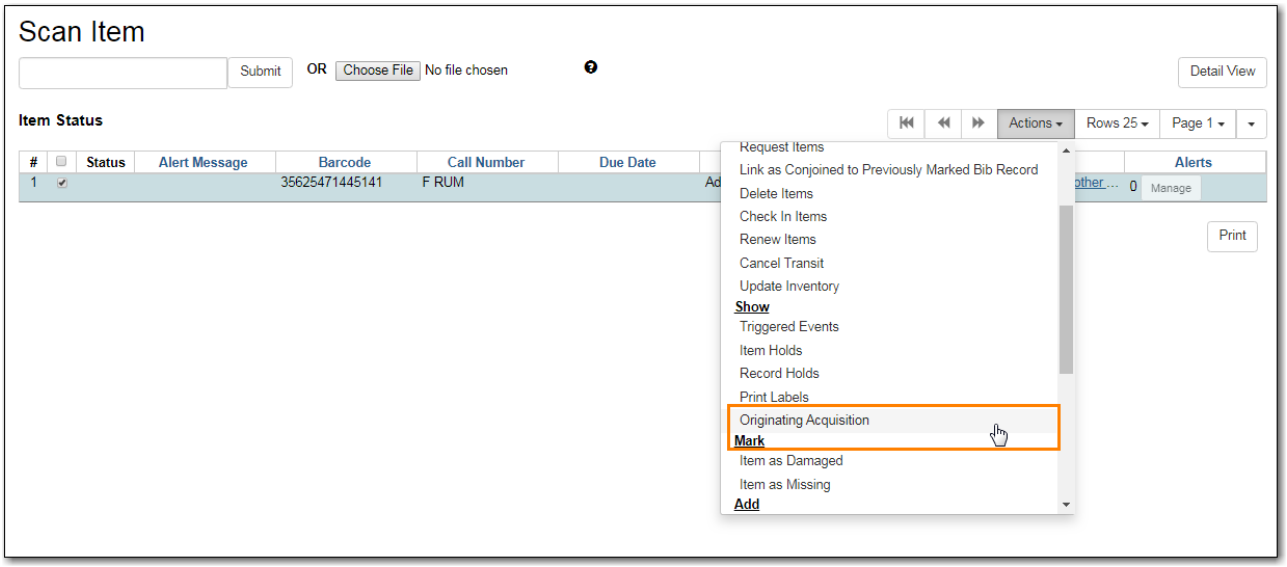
Search Tips

1. Search operators that are not applicable to the search term selected will not appear in the operator drop down menu when creating a new search. Only relevant search operators will display as options.
2. Fields that are associated with controlled vocabularies will display the controlled values in both the search terms and filters for easy selection.
3. Column headers for the search results can be clicked on to sort the results by the column. The columns will sort alphabetically or by other sort criteria as appropriate for the data type.
4. Using the column actions to filter or sort search results will execute a new search using the current search parameters. If any un-executed changes are made to the search parameters between the initial search submission and any changes to the filters, the new search parameters will be executed upon filtering.

4.7. Originating Acquisition

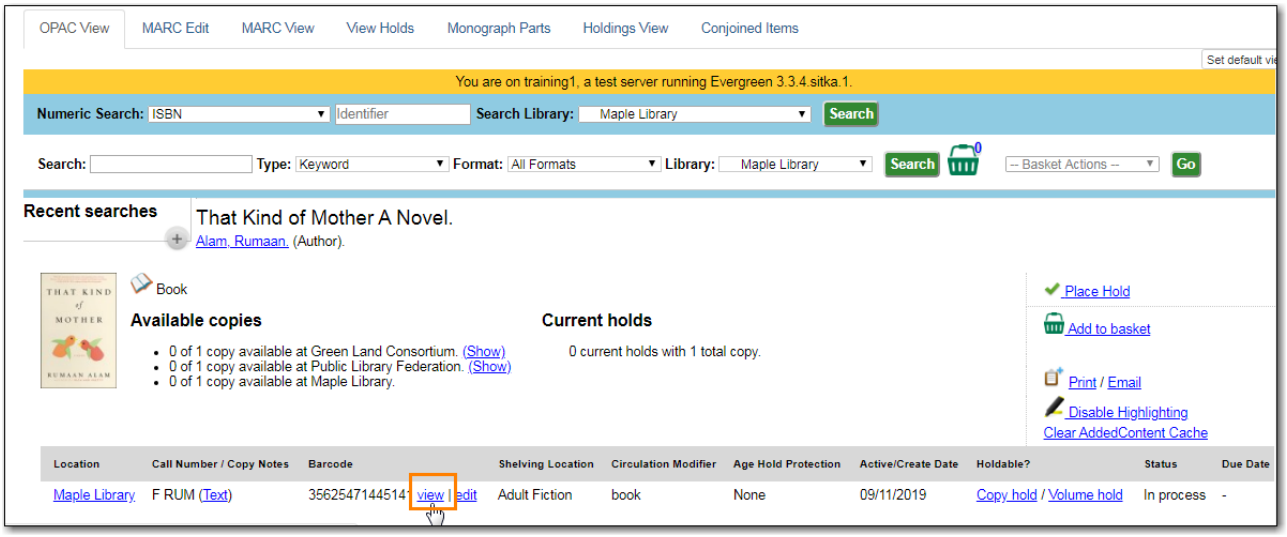
Show Originating Acquisitions from Item Status

1. Click **Circulation** → **Item Status**
2. Enter the item barcode
3. Click **Actions** → Show **Originating Acquisition**

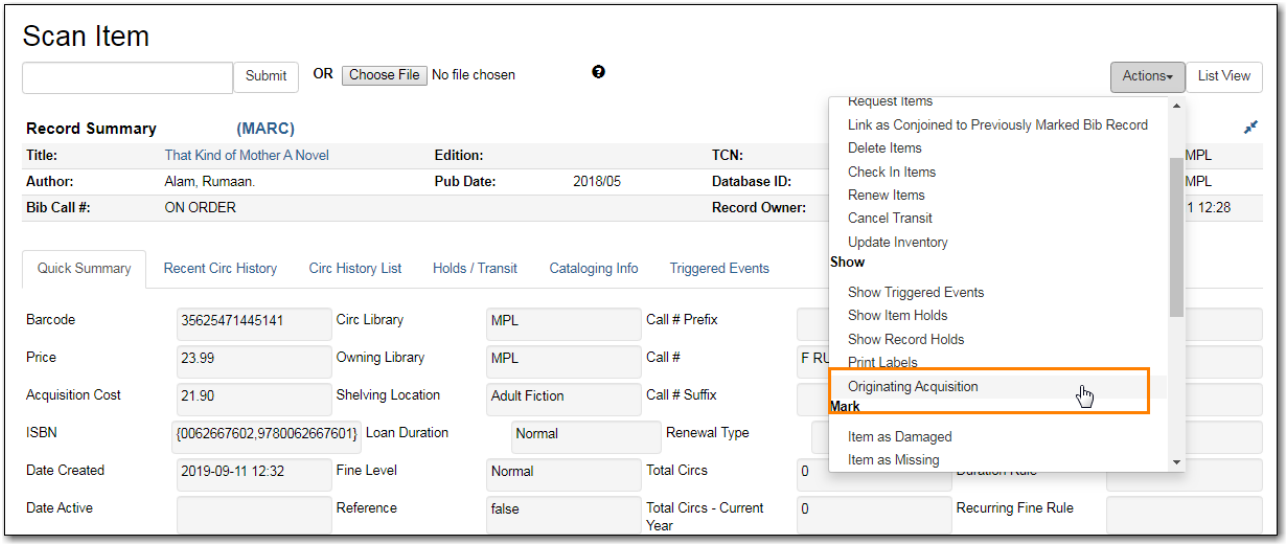


Show Originating Acquisitions from the Catalogue

1. Click **view**



2. Click **Actions** → Show **Originating Acquisition**


Scan Item
Submit
OR
Choose File
No file chosen
Actions
List View
Record Summary
(MARC)
Title:
That Kind of Mother A Novel
Edition:
TCN:
Author:
Alam, Rumaan.
Pub Date:
2018/05
Database ID:
Bib Call #:
ON ORDER
Record Owner:
Request Items
Link as Conjoined to Previously Marked Bib Record
Delete Items
Check In Items
Renew Items
Cancel Transit
Update Inventory
Show
Show Triggered Events
Show Item Holds
Show Record Holds
Print Labels
Originating Acquisition
Mark
Item as Damaged
Item as Missing
Quick Summary
Recent Circ History
Circ History List
Holds / Transit
Cataloging Info
Triggered Events
Barcode
35625471445141
Circ Library
MPL
Call # Prefix
Price
23.99
Owning Library
MPL
Call #
Acquisition Cost
21.90
Shelving Location
Adult Fiction
Call # Suffix
ISBN
{0062667602,9780062667601}
Loan Duration
Normal
Renewal Type
Date Created
2019-09-11 12:32
Fine Level
Normal
Total Circs
0
Date Active
Reference
false
Total Circs - Current Year
0
Recurring Fine Rule

Chapter 5. Selection Lists

Selection lists allow you to create, manage, and save lists of items that you may want to purchase.

View your Selection Lists

1. Click **Acquisitions** → **My Selection Lists**.
    a. Use the general search to view selection lists created by other users.
    b. Refer to Search for Selection Lists for details.

Create a Selection List

1. Click **Acquisitions** → **My Selection Lists**.
2. Click the New Selection List drop down arrow.
3. Enter the name of the selection list in the box that appears.
4. Click **Create**.

You can also create a Selection lists on these screens.

- **New Brief Record**
- **Upload MARC Order Records**
- **MARC Federated Search**

NOTE	In each of these interfaces, you will find the Add to Selection List field. Enter the name of the selection list that you want to create in that field.

Add Items to a Selection List

- Add a brief record
    - See Add Brief Records
- Upload MARC order records
    - See Load MARC Order Records
- MARC federated search
    - See MARC Federated Search
- View/Place Orders menu item in the catalog.
    - See View/Place Order

Convert a selection list to a purchase order.

1. From a selection list, click **Actions** → **Create Purchase Order**.
2. A pop up box will appear.
3. Select the ordering agency from the drop down menu.

4. Enter the provider.
5. Check the box adjacent to prepayment required if prepayment is required.
6. Choose if you will add All Line items or Selected Line items to your purchase order.
7. Check the box if you want to Import Bibs and Create Copies in the catalog.
8. Click Submit.

Clone Selection List

1. Click **Acquisitions → My Selection Lists**.
2. Check the box adjacent to the list that you want to clone.
3. Click **Clone Selected**.
4. Enter a name into the box that appears.
5. Click **Clone**.

NOTE	Cloning selection lists enables you to copy one selection list into a new selection list. You can maintain both copies of the list, or you can delete the previous list.

Merge two or more selection lists into one selection list.

1. Click **Acquisitions → My Selection Lists**.
2. Check the boxes adjacent to the selection lists that you want to merge, and click **Merge Selected**.
3. Choose the Lead Selection List from the drop down menu.
    a. This is the list to which the items on the other list(s) will be transferred.
4. Click **Merge**.

Delete Selection List

1. Click **Acquisitions → My Selection Lists**.
2. Check the box adjacent to the selection list(s) that you want to delete.
3. Click **Delete Selected**.

NOTE	You must delete all line items from a selection list before you can delete the list.

Chapter 6. Load MARC Order Records

Use the Acquisitions **Load MARC Order Record** screen to add MARC records to selection lists or purchase orders and upload records into the catalog. When **Load MARC Order Records** is used in conjunction with a holding tag and subfield information copies can be created during upload. See Holding Subfields for information on setting up holding tags and subfields.

Upload MARC Order Records

1. Click **Acquisitions → Load MARC Order Records**.
2. Check **Create Purchase Order**.
    a. If you want to upload the records to a selection list instead, you can select a list from the drop down menu, or type in the name of the selection list that you want to create.
3. Do not check Activate Purchase Order.
4. Enter the name of the **Provider**. The text will auto-complete.
5. Select a **Context Org Unit** from the drop down menu.
6. Select a **Fiscal Year** from the drop down menu that matches the fiscal year of the funds that will be used for the order.
    a. If no fiscal year is selected, the system will use the organizational unit's default fiscal year stored in the database. If no fiscal year is set, the system will default to the current calendar year.
7. Create a queue to which you can upload your records, or add you records to an existing queue
8. Select a **Record Match Set** from the drop-down menu.
    a. Choose **Sitka Match**
9. Select a **Merge Profile.** Merge profiles enable you to specify which tags should be removed or preserved in incoming records.
    a. Choose **Merge Using EXISTING Record**
10. Select a **Record Source** from the drop-down menu.
11. If you want to automatically import records on upload, select one or more of the following options.
    a. Import Non-Matching Records - import any records that don't have a match in the system.
    b. Merge on Exact Match (901c) - use only for records that will match on the 901c field.
    c. Merge on Single Match - import records that only have one match in the system.
    d. Merge on Best Match - If more than one match is found in the catalog for a given record, Evergreen will attempt to perform the best match as defined by the match score.
12. Best/Single Match Minimum Quality Ratio. (Optional)
13. Insufficient Quality Fall-Through Profile. (Optional)
14. **Do not check** Load Items for Imported Records.

a. If your order records contain holdings information, by default, Evergreen will load them as acquisitions copies.

   i. If Load Items for Imported Records is **checked** copies will be created in the catalogue during upload.

   ii. If Load Items for Imported Records is **not checked** copies will be created in the catalogue when the order is activated.

15. Click **Upload**

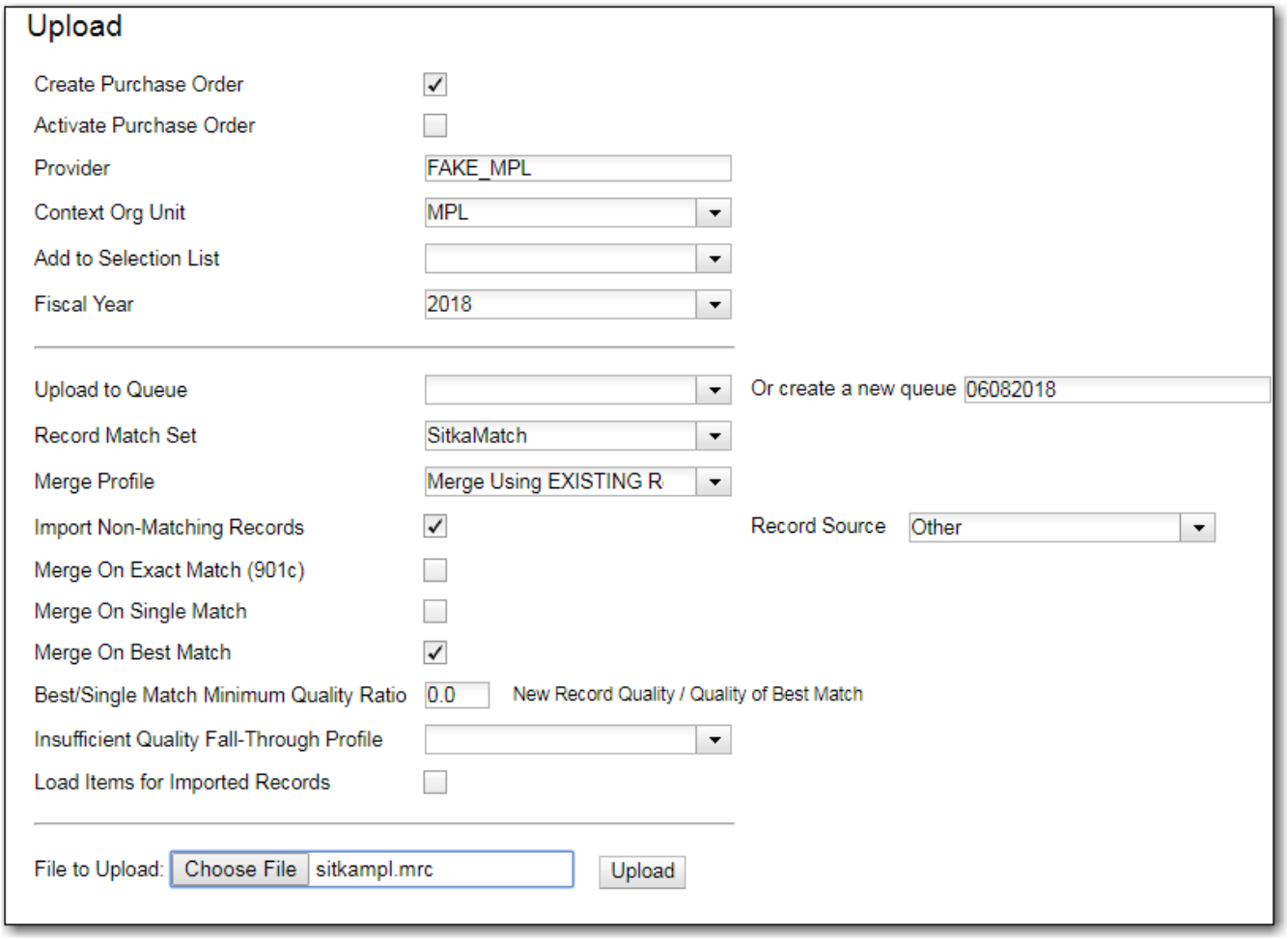


Figure 1. Load MARC Order Records recommended settings for upload

6.1. Default Upload Settings

You can set default upload values by modifying the following settings in **Administration → Local Administration → Library Settings Editor**:

Recommended Settings

- Upload Create PO
  - True
- Upload Default Match Set
  - SitkaMatch

- Upload Default Merge Profile
  - Merge Using EXISTING Record
- Upload Merge on Best Match by Default
  - True

Do not Set values for these settings

- Upload Activate PO
- Upload Default Provider
- Upload Load Items for Imported Records by Default
- Upload Upload Default Min. Quality Ratio
- Upload Default Insufficient Quality Fall-Thru Profile
- Upload Merge on Exact Match by Default
- Upload Merge on Single Match by Default

NOTE	If the above default settings are not implemented, the selections/values used during upload will be sticky and will automatically populate the fields the next time the **Load MARC Order Records** screen is pulled up.

6.2. Acq Import Error

When loading records via the **Load MARC Order Records** screen you may occassionally encounter the *ACQ IMPORT ERROR*.

This error is usually caused by discrepancies between the holdings information supplied by the vendor in the 970 field of the MARC record and the information in Evergreen.

If you update your shelving location names or fund codes in Evergreen make sure to let your vendors know about the changes so they can update their templates as well.

Chapter 7. MARC Federated Search

The MARC Federated Search enables you to import bibliographic records into a selection list or purchase order from a Z39.50 source.

Import record using MARC Federated Search

1. Click **Acquisitions** → **MARC Federated Search**.
2. Check the boxes of Z39.50 services that you want to search. Your local Evergreen Catalog is checked by default.
3. Click **Submit**.
4. A list of results will appear.
5. Check the box(es) on the line item → Click **Actions**
    a. **Save Items to Selection List** - save the line item(s) to a selection list.
    b. **Create Purchase Order** - create a purchase order from the line item(s).
    c. **Add to Purchase Order** - add the line item(s) to an existing purchase order.

Chapter 8. Load Catalog Record IDs

The Load Catalog Record IDs function enables you to create line items from a list of catalogue records whose record IDs are saved in a CSV file. This is useful if you want to batch order copies of items that your organization already owns. For example, you run a copy/hold ratio report to identify how many copies you have available compared to the number of holds that are on your Hot Fiction display. You decided that you want to order an extra copy of six titles. Your copy/hold ration report includes the record ID of each title. You can save the record IDs into a CSV file, upload the file into Evergreen, and create a purchase order for the items. If you only want to order additional copies of one title then using View/Place Orders is faster.

Load Catalogue Record IDs

1. Create a CSV file with the record ID of each catalogue record in the first column of the spreadsheet. You can create this CSV file from a spreadsheet generated by a report, as suggested in the aforementioned example. You can also copy and paste record IDs from the catalogue record into the CSV file.
2. Save the CSV file to your computer.
3. In Evergreen, select **Acquisitions → Load Catalog Record IDs**.
4. Click **Load More Terms**.
5. Locate the desired file and click **Open**.
    a. The screen will display the number of terms (record IDs) that have been loaded. Clicking Load more terms again will allow you to load an additional file of record IDs.
6. Click **Retrieve Records**.
    a. The records will appear as line items.
7. Save the line item(s) to a selection list by checking the box(es) adjacent to the desired line item(s) and selecting **Actions → Save Items to Selection List**.
    a. Either Save as Selection List and type in the name of a new selection list, or Add to Selection List and type in the name of any existing selection list created by any user at your library.
8. Create a purchase order from the line item(s) by checking the box adjacent to the desired line item(s) and selecting **Actions → Create Purchase Order**.
9. Add the line item to an existing Purchase Order by checking the box adjacent to the desired line item(s) and selecting **Actions → Add to Purchase Order**.
    a. In the pop up box that appears enter the name of the purchase order you wish to add the line item to.

NOTE	Record IDs are auto-generated digits associated with each record. They are found in the Record Summary that appears at the top of each record in the catalogue.

Chapter 9. Purchase Orders

This chapter describes how to create and activate purchase orders in the Acquisitions Module.

9.1. Create Purchase Orders

Create a Blank Purchase Order

1. Click **Acquisitions → Create Purchase Order**
2. Choose your library from the **Ordering Agency** drop down menu.
3. Enter a purchase order **Name** (optional).
    a. If you do not enter a name the PO ID will be used.
    b. You can change the name to any grouping of letters or numbers as determined by your library's policies.
    c. You can reuse purchase order names as long as a name is never used twice in the same year.
4. Enter the Provider code. The text will auto-complete.
5. Check the box for Prepayment Required if prepayment is required.
6. Click **Save**
7. The purchase order has been created. You can now add a brief record or view/place order to select from the catalogue.

You can also create a Purchase Order on these screens.

1. **Upload MARC Order Records**
2. **MARC Federated Search**
3. **View/Place Orders**

When creating a purchase order or editing an existing purchase order, the purchase order name must be unique for the ordering agency. Evergreen will display a warning dialog to users, if they attempt to create or edit purchase order names that match the names of already existing purchase orders at the same ordering agency. The **Duplicate Purchase Order Name Warning Dialog** includes a link that will open the matching purchase order in a new tab.

When a duplicate purchase order name is detected, the user may:

- Click **View PO** to view the purchase order with the matching name. The purchase order will open in a new tab.
- Click **Cancel** to cancel the creation of the new purchase order.
- Within the *Name (optional)* field, enter a different, unique name for the new purchase order.

- If the purchase order name is unique for the ordering agency, the user will continue filling in the remaining fields and click **Save**.
- If the purchase order name is not unique for the ordering agency, the Save button will remain grayed out to the user until the purchase order is given a unique name.

To change the name of an existing purchase order:

1. Within the purchase order, the *Name* of the purchase order is a link (located at the top left-hand side of the purchase order). Click the PO Name.
2. A new window will open, where users can rename the purchase order.
3. Enter the new purchase order name.
4. Click **OK**.

NOTE	Purchase Order Names are case sensitive.

9.2. Add Line Items

9.2.1. Brief Records

Brief records are short bibliographic records with minimal information that are often used as placeholder records until items are received. Brief records can be added to selection lists or purchase orders and can be imported into the catalog. You can add brief records to new or existing selection lists. You can add brief records to new, pending or on-order purchase orders.

Add brief records to purchase orders

You can add brief records to new or existing purchase orders.

1. Open or create a purchase order.
2. Click **Actions** → **Add Brief Record**.
3. Enter bibliographic information in the desired fields.
4. Click **Save Record**.

CAUTION	Brief Records are created without an 008 field. Co-op Support strongly recommends that you edit the MARC record to add an 008.

9.2.2. Place Order

View/Place Orders to order an additional copy of an item that is already in the catalogue.

1. Open the bibliographic record of the title you wish to purchase.
2. Click **Other Actions → View/Place Orders**
3. Click **Add to Selection List**, **Add to Purchase Order** or **Create a Purchase Order**

9.3. Activate Purchase Order

9.3.1. Activation Criteria

Copy

- Each line must have at least one copy attached to it.
- If there is no copy the Activate Order? field will read, *Activatable? No: The lineitem has no attached copies (ACQ_LINEITEM_NO_COPIES) (lineitemID).*
  1. Attach a copy to the line item to resolve the issue.
     - Refer to Add Copies to a Line Item for details.
     - Copies should not be added to line items after a purchase order is activated.

Owning Branch

- Each line item must have an Owning Branch.
- If there is no assigned Owning Branch Activate Order? field will read, *Activatable*. However attempting to Activate the order will result in an error message.
- Use the Line Item Batch Updater to assign an Owning Branch.
  - Refer to Line Item Batch updater for details.

Fund

- Each line item must have funds applied to it.
- If no funds are applied the Activate Order? field will read, *No: The requested acq. fund was not found (ACQ_FUND_NOT_FOUND).*
- Apply funds individually or as a batch.
  - The fund(s) used for the purchase order must not have reached its stop level. If the fund is above its stop level the Activate Order? field will read, No; fund [fund name here] would be encumbered beyond its stop level. In this case, more credit must be allocated to the fund or a different fund must be applied to the purchase order.
  - If the fund(s) used for the purchase order have reached its warning level staff will be alerted but are able to continue with activating the purchase order.

Price

- Each line item must contain an estimated price.
- If there is no estimated price the Activate Order? field will read, *No: The lineitem has no price (ACQ_LINEITEM_NO_PRICE).*
- Enter prices in the estimated price fields.

When the above criteria have been met the **Activate Order** button will appear and you can proceed with the following:

9.3.2. Activate a Purchase Order

Activate a Purchase Order

1. Click **Activate Order**.
2. When you activate the order the bibliographic records and copies will be imported into the catalogue using the Vandelay interface, if not previously imported. See Load MARC Order Records for instructions on using the Vandelay interface.
3. The funds associated with the purchases will be encumbered.

After you click **Activate Order**, you will be presented with the record import interface for records that are not already in the catalogue. Once you complete entering in the parameters for the record import interface, the progress screen will appear. This progress screen consists of a progress bar in the foreground, and a tally of the following in the background of the bottom-left corner:

- Lineitems processed
- Vandelay Records processed
- Bib Records Merged/Imported
- ACQ Copies Processed
- Debits Encumbered
- Real Copies Processed

CAUTION	There is a known bug which stalls activation on Purchase Orders where the records are not already linked to the catalogue. If your progress bar freezes at 100% click your browser refresh button and click **Activate Order** for a second time.

9.3.3. Activate Purchase Order Without Loading Items

This function should only be used in situations where the copies have already been added to the catalogue.

- Cleaning up pre-acquisitions backlog
- Direct purchases that have already been catalogued

Activate Purchase Order without loading items

1. Click **Activate Without Loading Items**.
2. The funds associated with the purchases will be encumbered.

NOTE	Once the purchase order has been activated without loading items, it is not possible to load the items in Acquisitions.

9.4. Purchase Order Actions

The actions available will depend on the current state.

Purchase Order in any State

- Export Single Attribute List
- Print Purchase Order
- View PO History
- Apply Claim Policy to Selected Line Items

If Purchase Order State is pending

- Delete Selected Items
- Add Brief Record
- Load Bibs and Items

If Purchase Order State is on-order

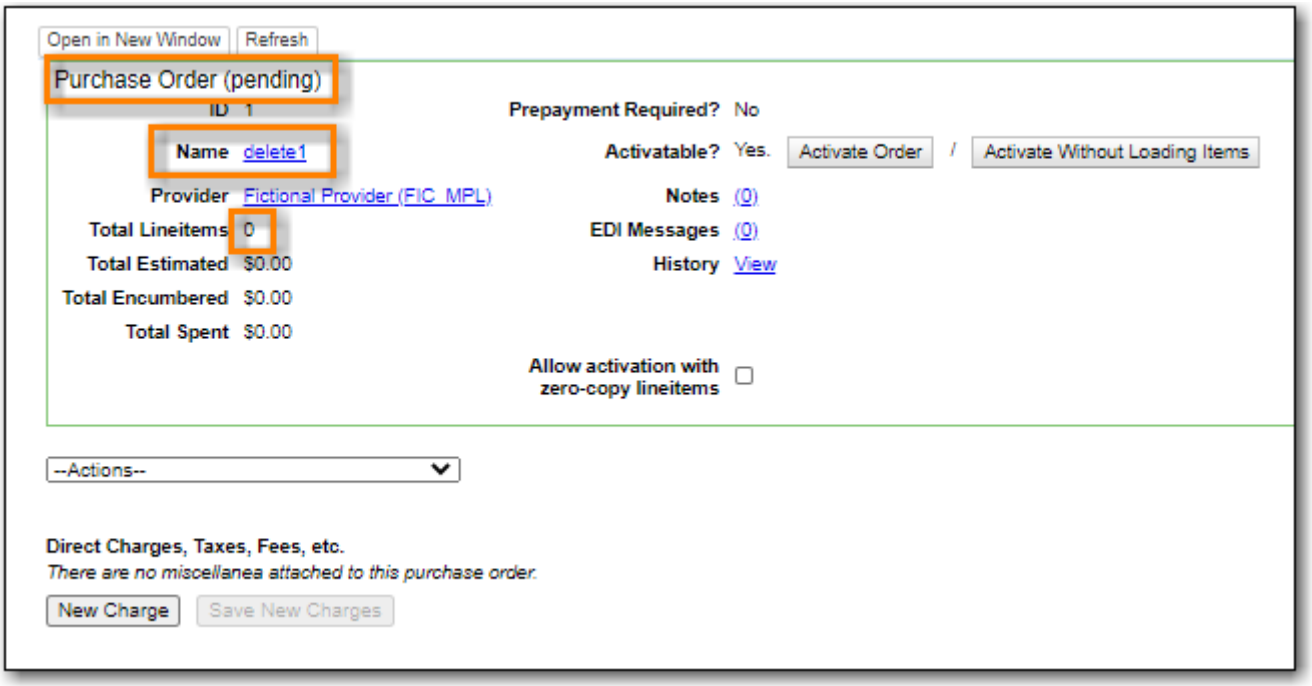
- Cancel Selected Line items
- Mark Selected Line Items as Received
- Un-Receive Selected Line Items
- Create Invoice From Selected Line Items
- Link Selected Line Items to Invoice

9.5. Delete Purchase Orders

Purchase orders cannot be deleted from within the staff client.

Purchase orders that meet all the following criteria are automatically deleted from the database daily.

- The purchase order has the state of **Pending**
- The purchase order is **empty**, has no line items or charges
- The purchase order has the word **delete** at the beginning of its name

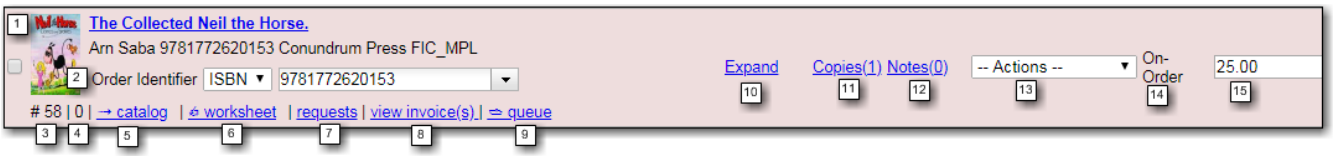

Open in New Window
Refresh
Purchase Order (pending)
ID 1
Name delete1
Provider Fictional Provider (FIC_MPL)
Total Lineitems 0
Total Estimated $0.00
Total Encumbered $0.00
Total Spent $0.00
Prepayment Required? No
Activatable? Yes.
Activate Order
/
Activate Without Loading Items
Notes (0)
EDI Messages (0)
History View
Allow activation with zero-copy lineitems
--Actions--
Direct Charges, Taxes, Fees, etc.
There are no miscellanea attached to this purchase order.
New Charge
Save New Charges

Chapter 10. Line Items

Line items represent bibliographic records on a selection list or purchase order.

10.1. Line Item Attributes

Line item attributes are characteristics of the bibliographic record, such as ISBN or Title. Line items also contain copy information, price information, notes, and alerts.



Line Item

1. Title & Publishing information
2. Order Identifier
3. Line Item ID
4. Count of Existing Copies
5. Link to Catalog
6. Worksheet
7. Requests
8. Invoice
9. Queue
10. Line Item Detailed view
11. Copies
12. Notes
13. Actions
14. Status
15. Price

Title & Publishing information - Title & Publishing information from the bibliographic record. If there is a jacket cover it will be displayed.

Order Identifier - Line items that are created from existing MARC records may have multiple

ISBNs, ISSNs, or UPCs attached to the record (depending on the type of item). Users are able to specify which ISBN, ISSN, or UPC to display in the purchase order sent to providers. User can also add new identifiers as needed. This function helps to ensure that the correct edition of an item is ordered.

- From the drop down menu chose the appropriate ISBN, ISSN, or UPC; or you can highlight the existing identifier and type in or paste your new identifier.

Line Item ID = A unique system generated ID# which can be used to search for & retrieve line items.

Count of Existing Copies on Line items

When displaying Acquisitions line items within the Selection List and Purchase Order interfaces, Evergreen displays a count of existing catalog copies on the line item. The count of existing catalog copies refers to the number of copies owned at the ordering agency and / or the ordering agency's child organization units.

- The counts display for line items that have a direct link to a catalog record. Generally, this includes line items created as "on order" based on an existing catalog record.
  - If the existing copy count is greater than zero, then the count will display in bold and red on the line item.
  - If no existing copies are found, a "0" (zero) will display in plain text.
- The count of existing copies does not include copies that are in either a Lost or a Missing status.

Catalog link / Link to Catalog

You can link a line item on a selection list to a corresponding MARC record in the catalogue. The link to catalog option enables you to search for a matching record and link the line item to it. The catalogue record replaces the record originally used to create the line item. When bibliographic records and copies are loaded into the catalogue the copies are attached to the linked record in the catalogue. Open a selection list or purchase order. On the line item you would like to link, click link to catalog. The Locate Bib Record search box will appear. By default the search box contains the item's the ISBN, title, and author. Adjust your search terms if necessary. Click Search. Your result(s) will appear. If there are no results you will return to the search screen. The brief bibliographic information appears. Click View MARC to view the MARC record of your selection. Click Hide to hide the MARC record. If you are satisfied that the record is for the same item, click Select to link it to the record on the selection list or purchase order. The screen will reload and the line item will display with a catalog link. The line item is now linked to the MARC record in the catalogue. This is the record the holdings will attach to when you Load Bib Records and Items into the catalogue.

Line Item Worksheet

1. Click the worksheet link on the line item for which you would like to view the worksheet.
2. The line item worksheet will appear.
3. The worksheet can be printed by CTRL+P.
4. When you are finished, click Return to return to your selection list or purchase order.

Patron Requests - this feature is not currently used by Sitka libraries

Invoice - a link to the invoice

Queue - a link to the Acquisitions queue

Line Item Detailed view

- Click **Expand** on a line item to display the detailed view for that line item.
- Click **Expand All** to display the detailed view for all line items.
    - Clicking Expand or Expand All a second time will close the detailed view.

Copies - Use the Copies link to add copy information to a line item.

Notes - Use the Notes link to add notes or alerts to a line item.

Actions - Use the Actions link to perform specific actions on a line item.

Refer to Line Item Actions for details.

Line Item Status - Refer to Line Item Status for details.

Estimated Price - A purchase order will not activate without the Estimated Price field filled in for each line item. The price entered into Estimated Price is the amount that will be encumbered for the item. It is also the amount that will appear in the price field of the copy editor for all copies created from this line item.

10.2. Add Copies to a Line Item

By default, line items have no copies attached to them. If a default number of copies as been specified for the provider, when line items are added to a purchase order copies are automatically added. Use the **Batch Updater** or **Copies** link to add copy information to a line item. You can add copies to line items on a selection list or a pending purchase order.

Add a Copy via the Line Item Batch Updater on a selection list or purchase order.

1. Open a selection list or purchase order.
2. Enter the total number of copies for the line item in the Copies field on the Line Item Batch Updater.
3. The number entered in the Copies field is always the total number of copies for the line item, not the number of copies to add to the selected line item(s).
4. Check the box(es) beside the line item(s) you wish to apply the copies to.
5. Click Apply to Selected.
6. The zero of the Copies link will update to reflect the number of copies created for the line item.

Add a Copy via the Copies Screen on a selection list or purchase order.

1. Open a selection list or purchase order.
2. Click the Copies (0) link on the line item you would like to add copies to. This will take you to the Copies screen.
3. Enter the number of copies you would like to order into Item Count and click Go. A line will be created for each copy.
4. The gray box is a batch update function. Each field in this box corresponds to the columns below.
    a. You can use the batch update for:
        i. Owning Branch
        ii. Copy Location
        iii. Collection Code
        iv. Fund
        v. Circ Modifier
        vi. Call Number
    b. Enter your terms and click Batch Update. The copies will update to reflect your choices.
5. Once you have entered all the desired information, click Save Changes.
6. Click Return to return to your selection list or purchase order.
7. The zero of the Copies link will update to reflect the number of copies you have created for the line item.

NOTE	Copies should not be added once a purchase order has been activated.

10.3. Line Item Batch updater

The Line Item Batch Updater allows line items on selection lists or purchase orders to have multiple fields batch updated simultaneously.

The following fields can be batch updated:

- Copies - this is the total number of copies for the line item, rather than additional copies
- Owning Branch
- Copy Location
- Collection Code
- Fund
- Circ Modifier

Rather than filling in the same fields every time users can set up Distribution Formulas to use as Line Item Templates.

Batch Update Line Items

1. Select the line items to apply the updates to.
2. Fill in the individual fields on the Batch Updater you wish to update or select a Distribution Formula to use.
3. Click **Apply to Selected**.

10.4. Line Item Actions

The line item actions menu provides you with a number of functions that can be applied to a particular line item.

Update Barcode

1. Using the Actions menu on the line item, click **Actions → Update Barcodes**.
    a. The line item must be marked as received before you can update the barcode.
2. The Volume/Copy Editor will open in a new tab.

Holdings Maintenance

1. Once an item is received it is possible to use the Actions menu to go directly to Holding Maintenance to view and edit the holdings for a line item.
2. Open a purchase order.
3. Using the Actions menu on the line item, click **Actions → Holdings Maint.**.

4. The Holdings Maintenance screen will open in a new tab.
5. See Adding Holdings for further instructions.

Claim

1. Using the Actions menu on the line item, click **Actions → Claims (0 existing)**.
2. Check the boxes adjacent to the copies you wish to claim and click **Claim Selected**.
3. From the Claim Type drop down menu select the Claim reason.
4. Enter a note(optional) and click **Claim**.
5. Claim vouchers for the claimed items will appear.
6. Click **Print** to save or print out your vouchers.
    a. The voucher can be mailed or emailed to the provider to initiate the claim.
7. The number of existing claims on the line item updates.

View History

1. Using the Actions menu on the line item, select **Actions → View History**.
2. By default the newest changes appear first. Use the column headers to sort.

10.5. Line Item Notes

Notes on line items can include any additional information that you wish to add to the line item. Notes can be internal or can be made available to providers. Notes also display on the Line Item Worksheet for the item.

Add a Note

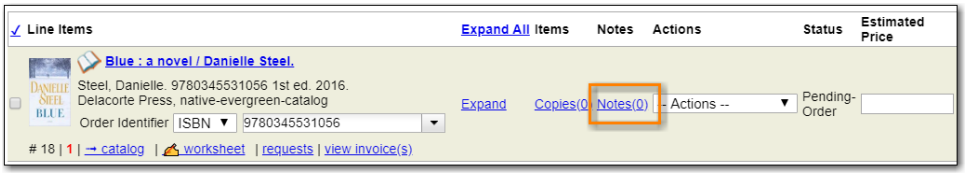
1. Click **Notes (0)**.
2. Click **New Note**.
3. Enter your note.
4. If you wish to make this note available to your provider, check the box adjacent to Note is vendor-public.
5. Click **Create**. The note will display on the screen.
6. Click **Return** to return to the selection list or purchase order.
7. The zero of the Notes link will update to display the total number of alerts and notes for the line item.

10.6. Line Item Alerts

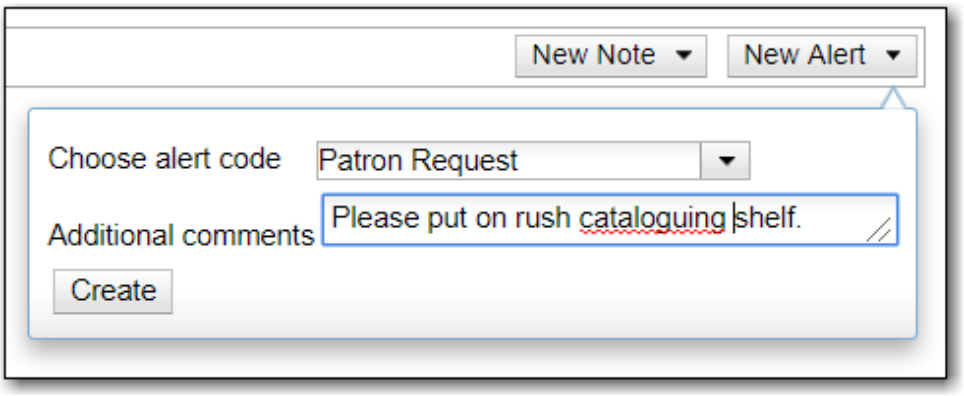
Alerts are pop up messages that appear when an item is received. Alerts also display on the Line Item Worksheet for the item.

Add an Alert

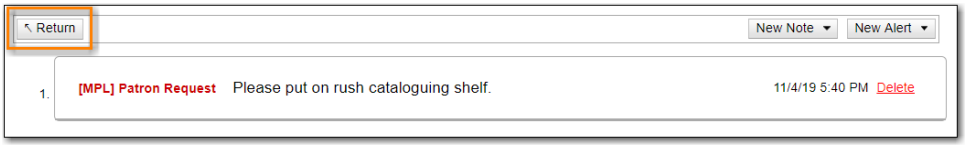
1. Click **Notes (0)**.



2. Click **New Alert**.
3. Choose an alert code from the drop down menu. These Line Item Alert codes are created by your Acquisitions Administrator.
4. Add additional comments (optional).
5. Click **Create**. The alert will display on the screen.



6. Click **Return** to return to the selection list or purchase order.



7. A red flag will now appear to the right of the Notes link and the zero of the Notes link will update to display the total number of alerts and notes for the line item.

10.7. Line Item Status

The status of a line item displays to the right of the actions menu. The line item bar changes colour depending on the status of the line item.

The colours that display may vary depending on your screen resolution.

Possible statuses

- new (off-white): Item is newly added to the acquisitions process.
- selector-ready (light pink): Item has been chosen and is waiting for a selector to approve.
- order-ready (periwinkle): Item is ready to be ordered.
- pending-order (grey): Item is part of a purchase order that has not yet been activated.
- on-order (pink): Item is currently on-order.
- received (grey blue): Item has been received by the library.
- received and paid (grey blue with red "Paid" label): Item has been received by the library, the invoice has been closed .
- cancelled (white): Item has been cancelled.
- delayed (blue): Item has been cancelled but debits remain as the item is really delayed.

NOTE	While there is some overlap in naming, line item statuses and item statuses are not the same thing.

10.7.1. Paid for Line Items

Purchase Order line items are marked as "Paid" in red text when all non-cancelled copies on the line item have been invoiced.

10.8. Delete a Line Item

Line items with the status of new, selector-ready, order-ready, or pending-order can be deleted. Be sure you want to delete the line item as there is no warning message and once deleted line items cannot be un-deleted.

NOTE	If you created copies for your line items before activating the purchase order you will need to delete the items from the catalogue before deleting the Acquisitions line item. See Deleting Holdings

Delete line item

1. Check the box(es) of the line item(s) you would like to delete.
2. Using the main Actions menu, select **Actions → Delete Selected Items**.
3. Your line item and the history associated with it will disappear.

Line items with the status of On-order cannot be deleted - these must be cancelled. See Cancel Acq for details

Chapter 11. Receive

You can receive or un-receive entire purchase orders, individual line items or specific copies. Items can be marked as received before or after they are invoiced.

11.1. Receive Purchase Order

You can receive purchase orders that have a status of on-order. You can un-receive purchase orders that have a status of received.

In the event that all items on a purchase order arrive together you are able to receive the entire purchase order at once.

Receive a Purchase Order

1. Open a purchase order.
2. Check the check box to select all items on the purchase order.
3. Click **Actions** → **Mark Selected Line Items as Received**.
4. Any alerts for the line items will pop up. Click OK to acknowledge the alerts and receive the items.
5. The line items will change to a gray blue colour and the Status will update to received.

Un-Receive a Purchase Order

1. Open a purchase order.
2. Check the check box to select all items on the purchase order.
3. Click **Actions** → **Un-Receive Selected Line Items**.
4. A pop up will appear asking you to confirm the action → Click **OK**.
5. The line items on the purchase order will change to a pink colour and the status will update to on-order.
    a. If the purchase order is received in the future it will behave in the same manner as a purchase order that is being received for the first time.

11.2. Receive Line items

You can receive line items that have a status of on-order. You can un-receive line items that have a status of received.

Receive a Line Item

1. Open a purchase order.

2. Check the check box(es) of the line item(s) you wish to receive.
3. Click **Actions → Mark Selected Line Items as Received**.
4. Any alerts on the line item will pop up. Click OK to acknowledge the alert and receive the item(s).
5. The line item(s) will change to a gray blue colour and the status will update to received.

Unreceive a Line Item

1. Open a purchase order.
2. Check the check box(es) of the line item(s) you wish to un-receive.
3. Click **Actions → Un-Receive Selected Line Items**.
4. A pop up will appear asking you to confirm the action → Click **OK**.
5. The line item(s) will change to a pink colour and the status will update to on-order.
    a. If the line item is received in the future it will behave in the same manner as a line item that is being received for the first time.

11.3. Receive Copies

You can receive copies that have a status of on-order. You can un-receive copies that have a status of received.

Receive a Specific Copy

1. Open a purchase order.
2. Click **Copies** on the line item for the copy or copies you wish to receive.
3. Click **Mark Received** adjacent to the copy you wish to receive.
4. Any alerts on the associated with the line item will pop up → Click **OK** to acknowledge the alert and receive the copy.
    a. The alerts associated with a particular line item will appear each time a copy on that line item is received.
5. Click **Return** to return to the purchase order.
    a. The line item will only change to a gray blue colour and update the status to received when all copies associated with the line item have been received. Otherwise the line item continues to display in a pink colour with a state of on-order.

Unreceive a Specific Copy

1. Open a purchase order.
2. Click **Copies** link on the line item for the copy or copies you wish to un-receive.
3. Click **Un-Receive** adjacent to the copy you wish to un-receive.
4. Click **OK**.
5. Click **Return** to return to the purchase order.

6. The line item will be a pink colour and the Status will show as on-order.
    a. If the copy is received in the future it will behave in the same manner as a copy that is being received for the first time.

11.4. Receive Items on the Invoice

You can receive line items directly from the invoice rather than through a purchase order.

1. Create or open an invoice.
2. link all applicable line items to the invoice. See Populating Invoices for instructions.
3. Click **Save**
4. Click Receive Items.
5. The Acquisitions Invoice Receiving screen opens.
6. Select the number of copies you would like to receive for each line item on the invoice.
7. Click **Receive Selected Copies**.
8. Click **Return to Invoice**.

11.4.1. List Mode

Receive specific copies

1. Create or open an invoice.
2. Click **Receive Items**.
3. Click **Use List Mode**.
    a. Line item details including Fund, Call Number, & Barcode will be displayed
4. Use the check boxes to select the specific copies you would like to receive.
5. Click Receive Selected Copies.
6. Select more copies to receive or click **Return to Invoice**.

NOTE	Fund debits linked to an invoice are marked as paid (encumbrances = false) only when the invoice is closed.

Chapter 12. Invoices

You can create invoices for purchase orders, individual line items, as well as creating blank invoices that charges can be added to. If you are setup for EDI your vendor can send you electronic invoices. If desired, you can create an invoice for items before you receive them. You are able to re-open closed invoices to make adjustments as well as print out all invoices. You can create an invoice to use for direct purchases or to link line items to.

Create a Blank Invoice

1. Click **Acquisitions** → **Create Invoice**.
2. Fill in the top section of the invoice. See Invoice details for details.
3. Click **Save**.

Create an Invoice From a Purchase Order

1. Open a purchase order.
2. Click Create Invoice.
3. A new invoice will open in the same tab.
4. Fill in the top section of the invoice. See Invoice Details for guidelines on filling in this information.
5. The Bibliographic Items section of the invoice will list all of the line items from the purchase order along with information pertaining to each line item.
6. Click **Save**.

Create an Invoice From Multiple Line Items

1. Open a purchase order.
2. Check the boxes beside the line items you would like to use to create your invoice.
3. Click **Actions** → **Create Invoice From Selected Lineitems**.
4. A new invoice will open in the same tab.
5. Click **Save**.

NOTE	You can link additional line items from the same or different purchase orders to this invoice.

Vendor created invoice from EDI

1. Select Acquisitions → General Search.
2. Search for the invoice using the **Vendor Invoice Id** found on the paper invoice received with the items.
3. Click on the Vendor Invoice ID to retrieve the invoice.
4. Click on Show Details.

5. Verify the information in the invoice details.
    a. See Invoice Details for guidelines on filling in this information.
6. If your shipment includes items received from a Standing Order the line item count will not match the count of items in the shipment.
    a. Only the items ordered via the Acquisitions module will appear as line items on the invoice.
    b. Standing Order items should be added as Direct Purchase charges.
7. Verify the billed amounts for each line item listed in the Bibliographic Items section.
    a. Invoices received via EDI will have line items attached with the billed and paid amounts entered by the vendor. If required the electronic invoice should be edited to match the paper invoice.
8. Mark the items as received
9. Add Charges for:
    a. Items received from a Standing Order should be added as a Direct Purchase.
    b. Processing costs should be added as Processing Fee or Processing Fee - Prorate.
    c. Shipping costs.
    d. Taxes.
10. Prorate the charges.
    a. Some charge types, such as taxes, are proratable. This means when Prorate is clicked the system divides the amount being charged proportionally among the funds in use on the invoice based on how much is being spent out of each fund.
    b. If the charge type selected is proratable the fund field will be grayed out. When the invoice is prorated the system will determine which funds to apply the charges to based on the contents of the invoice.
    c. Do NOT Prorate the charges until you are ready to close the invoice. If changes are made to billed amounts after prorating has been done the existing charges will not be automatically updated.
11. Save and Close the invoice
    a. Invoices must be closed for items to show as "Paid". Fund debits linked to an invoice are only marked as paid when the invoice is closed.

12.1. Invoice details

The Invoice Details section must be completed for every invoice created.

Invoice Details fields

- Vendor Invoice ID (required).
    - This number will be listed on the paper invoice sent by your provider.
- Receive Method (required).

    - Paper or EDI
- Provider and Shipper (required).
    - These fields will auto-complete.
- Note (optional).
- Payment Method
    - Available payment methods display in a drop down menu. Additional payment methods can be requested. See Guidelines for Submitting Suggestions for New Defaults.
- Invoice Date (required).
    - By default this is the date the invoice is created on. The date can be changed by clicking the field and selecting a new date using the calendar widget.
- Invoice Type
    - This field is used if your library distinguishes between types of invoices.
- Payment Authorization
    - This field is used if your library requires authorization for payments.
- Receiver (required).
    - This field defaults to the location at which your workstation is registered. If necessary, you can change the receiver using the drop down menu.

NOTE	The Invoice Details automatically hides once completed. The Invoice Details can be shown at any time by clicking Show Details.

Line Item Details

- Title
- Author
- ISBN
- summary of copies ordered, received, invoiced, claimed, and cancelled
- summary of amounts estimated, encumbered, and paid
- line item ID number
- link to the Selection List (if used)
- link to the Purchase Order

The # Invoiced and the # Billed fields will have auto-populated with the number of copies available to be invoiced for the line item.

These fields can be updated as needed.

Enter the amount billed into the Billed field. The Paid field will auto-fill to match.

The following fields are required to save the invoice:

1. Vendor Invoice ID

2. Provider
3. Shipper
4. Payment Method
5. # Invoiced
6. # Paid

Save an invoice

- Click Save to save the changes you have made and keep the invoice open.
- Click Save and Clear to save the invoice and open a blank invoice.

12.2. Add Line items to the Invoice

You can use the Link Invoice button to link all the line items on a purchase order to an existing invoice. For example, an invoice is received for a shipment with items on purchase order #1 and purchase order #2. When the invoice arrives, purchase order #1 is retrieved, and the invoice is created. Rather than recreate the invoice for purchase order #2 you simply link the purchase order to the invoice.

12.2.1. Link an Entire Purchase Order to an Existing Invoice

1. Open a purchase order.
2. Click Link Invoice.
3. In the drop down that appears, enter the invoice number of the invoice you would like to link the purchase order to.
4. Enter the code for the provider. This field will auto-complete.
5. Click **Link**.
6. The invoice will open in the same tab and all the line items on the purchase order will be added to the invoice.

Use the Link to Invoice for Selected Lineitems menu option to link multiple line items to an invoice that already exists in Evergreen. For example, an invoice may be made up of items from multiple purchase orders. In this circumstance, you can create an invoice for the selected line items from your first purchase order and then link the line items from other purchase orders onto your invoice.

12.2.2. Link Multiple Line Items to an Existing Invoice

1. Open a purchase order.
2. Check the boxes beside the line items you would like to link to your invoice.
3. Using the main Actions menu, select Actions → Link Selected Line Items to Invoice.
4. In the pop up box that appears, enter the invoice number of the invoice you would like to link

the line item to.

5. Enter the code for the provider. This field will auto-complete.
6. Click Link.
7. The Invoice # and Provider fields are sticky. The information entered in those fields will persist as you move between purchase orders until you change the information.
8. The invoice will open in the same tab with the selected line items attached.
9. Click Save.

You can use the new Search tab to search for and add line items to an invoice from within the invoice.

12.2.3. Search for Line Items from an Invoice

1. Open an invoice or create an invoice.
2. Click the Search tab.
3. Select your search criteria from the drop down menu.
4. See Searching for Line Items for general searching tips.
5. The Limit to Invoiceable Items check box is checked by default.
6. Invoiceable items are those that are on order, have not been cancelled, and have not yet been invoiced.
7. The Sort by title check box is optional.
8. By default, results are listed by line number. This check box sorts the results by ascending title.
9. Click Search or press Enter on your keyboard.
10. Search will start a new search while Enter will build on your current search.
    a. For example, choose LIA-ISBN as your search field, type in the ISBN of your first book and press Enter. The line item will appear in the results list. Then, type your next ISBN into the search box and press Enter. Both line items will now appear in the results list. Continue building your list.
11. Use the Next and Back links to navigate through the results.
12. Select the line items you would like to add to the invoice and click Add Selected Items to Invoice.
13. The selected line items are highlighted, and the invoice summary at the top of the screen updates.
14. Click the Invoice tab to see the updated invoice.
15. You can add additional charges to any invoice. Possible charges include taxes and shipping fees as well as charges for items that are purchased without a purchase order, such as a bulk book buy at a local bookstore.
    a. See Invoice Item Type for a list of the charge types available.
    b. Some charge types, such as taxes, are proratable. This means when Prorate is clicked the system divides the amount being charged proportionally among the funds in use on the invoice based on how much is being spent out of each fund.

12.2.4. Add Charges to an Invoice

1. Open an invoice.
2. Click **Add Charge**.
3. Choose the charge you would like to apply from the Charge Type drop down menu.
4. Using the drop down menu, choose the fund from which payment for the charge will come.
5. If the charge type selected is proratable the fund field will be grayed out. When the invoice is prorated the system will determine which funds to apply the charges to based on the contents of the invoice.
6. Enter a Title/Description of the charge.
7. In the Billed and Paid fields enter the amount billed and the amount paid respectively.
8. Click Save to save the changes you have made.
9. Click Close to close the invoice. Once all the line items and invoice charges have been added the invoice must be closed.
10. Invoices can be re-opened at a later date if adjustments are required. See Re-Open an Invoice.

12.2.5. Delete Charges from an Invoice

1. Open an invoice.
2. Click the Delete link adjacent to the charge line.
3. Confirm that you wish to delete the charge by clicking OK on the pop up that appears.
4. The charge is deleted and removed from the invoice.
5. Click Save to save the changes you have made.
6. Click Close to close the invoice.

NOTE	An invoice must be open in order to delete charges from it. It is possible to re-open a closed invoice if adjustments are necessary. See Re-Open an Invoice.

In the event that you receive and are invoiced for more copies that originally ordered, the additional copies can be easily added to the invoice.

12.2.6. Add Additional Copies to an Invoice

1. Additional copies must be added before the Billed and Paid columns are filled for the line item.
2. Open an invoice.
3. Update the number of copies in both # Invoiced and # Paid to reflect the number of copies you actually have.

4. The Extra Items pop up will appear to confirm the number of copies you are adding.
5. Select a fund from the drop down menu to apply to the new copies.
6. Click Add New Items.
7. Click Save to allow the changes to take effect.
8. The Title Details for the line item will update to reflect the additional copies. The additional copies are automatically received in the system. Proceed with paying the invoice.
9. The additional copies can be un-received if needed following the instruction in the Receiving and Un-Receiving Copies section.

12.2.7. Detach Line Items from an Invoice

1. Open an invoice.
2. Click the Detach link adjacent to the line item you wish to remove.
3. Confirm that you wish to detach the line item by clicking OK on the pop up that appears.
4. If your invoice is complete and contains proratable charges, click Prorate.
5. Save the invoice.
6. Click Close to close the invoice. Once all the line items and invoice charges have been added the invoice must be closed.
7. Don't forget to link the detached line item to another invoice or create a new invoice for it so it can be paid for.

Invoices can be re-opened at a later date if adjustments are required. See Re-Open an Invoice.

12.3. View an Invoice

You can view an invoice in one of three ways:

- View Invoices through a Search
- View Invoices on a Purchase Order
- View Invoices Attached to a Line Item

View Invoices through a Search

1. Click **Acquisitions** → **Invoices**.
2. By default the search interface is set to search for open invoices created by your ordering agency.
3. Click **Search**.

NOTE	The default invoice search allows you to quickly generate a list of open invoices. This search can also easily be modified to search for invoices using other

parameters.

View Invoices on a Purchase Order

1. Open a purchase order.
2. Click **View Invoices**.
    a. The number in parentheses indicates the number of invoices attached to the purchase order.
3. Select the invoice you would like to display from the grid that appears.

View Invoices Attached to a Line Item

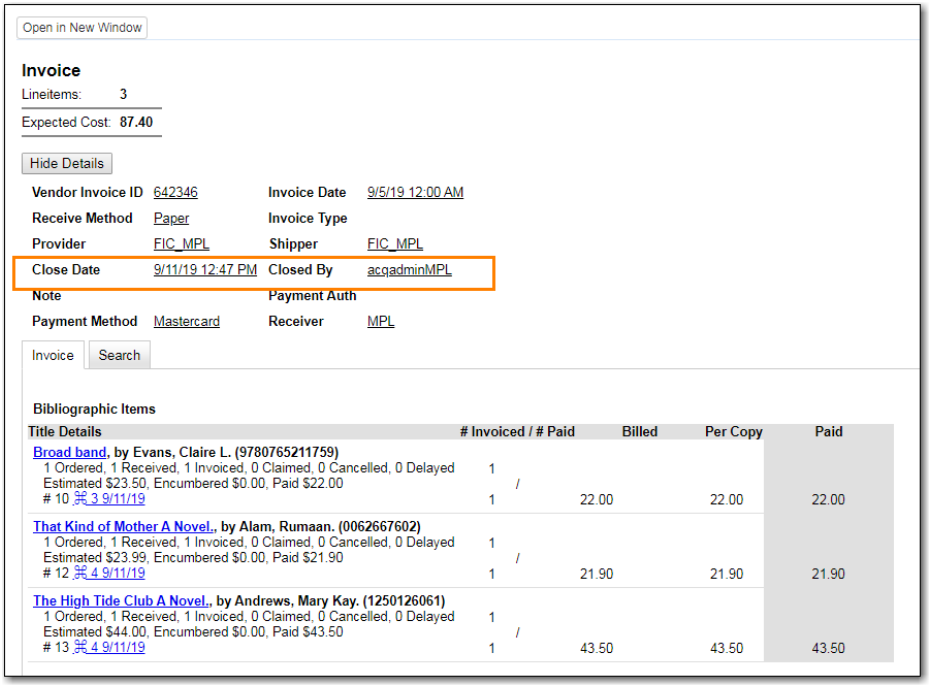
1. Open a purchase order.
2. Click view invoice(s) on the Line Item.
3. Select the invoice you would like to display from the grid that appears. The invoice will appear in the current tab.

12.4. Close an Invoice

Invoices must be closed for items to show as "Paid". Fund debits linked to an invoice are only marked as paid when the invoice is closed. Once all the line items and invoice charges have been added the invoice must be closed.

Close Invoice

1. Open or create an invoice.
2. Enter information into all of the required fields.
3. The totals at the bottom of the invoice will calculate based on the information entered.
4. These totals must match or the invoice will not close.
5. In the Billed column, enter the amount paid for each line item. The Paid column will auto-fill to match.
6. If your invoice contains proratable charges, click Prorate.
    a. This prorates the charges, such as taxes, across funds if multiple funds are used to pay the invoice.
7. Click **Save** to save the changes you have made to the invoice.
8. Click **Close**.
    a. Close Date — This is set to the time when the user clicks the **Close** button in the invoice interface.
    b. Closed By — This is set to the logged in staff user who performs the **Close** action.



A "Paid" label appears along the bottom of each line item in the PO display when every non-cancelled copy on the line item has been invoiced.

CAUTION	Invoices can be re-opened at a later date if adjustments are required. See Re-Open an Invoice. If an invoice is reopened the Close date and Closed By fields are cleared.

12.5. Re-open an Invoice

Completed invoices can be re-opened at anytime by users with appropriate permissions.

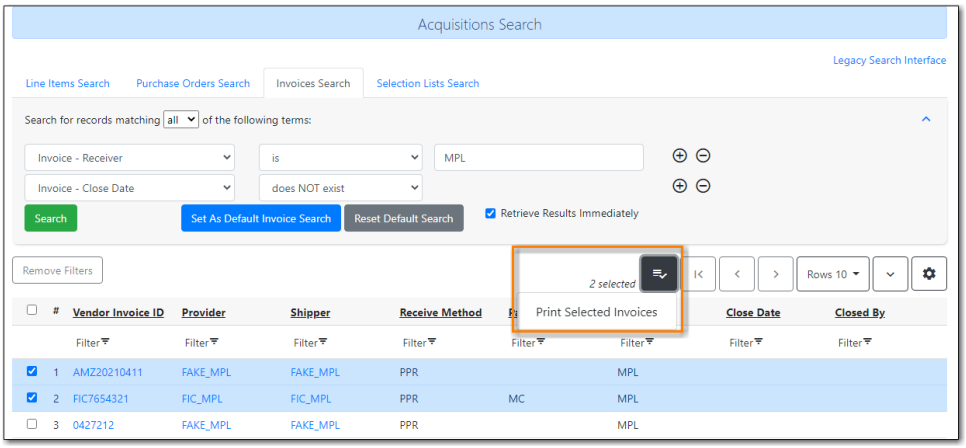
1. Open the completed invoice you wish to re-open.
2. At the bottom of the invoice click Reopen Invoice.
3. The invoice is now open and can be edited.
4. Click Close to close the invoice once finished.

12.6. Print Invoices

Invoices can be printed individually or as a batch from the search grid.

1. Click **Acquisitions** → **Invoices**.
2. This opens the Acquisitions Search screen. Use this search to retrieve the invoices you would like to print. See Invoices Search for more details.
3. Check the box(es) adjacent to the invoices you would like to print.

4. Click **Actions → Print Selected Invoices**.



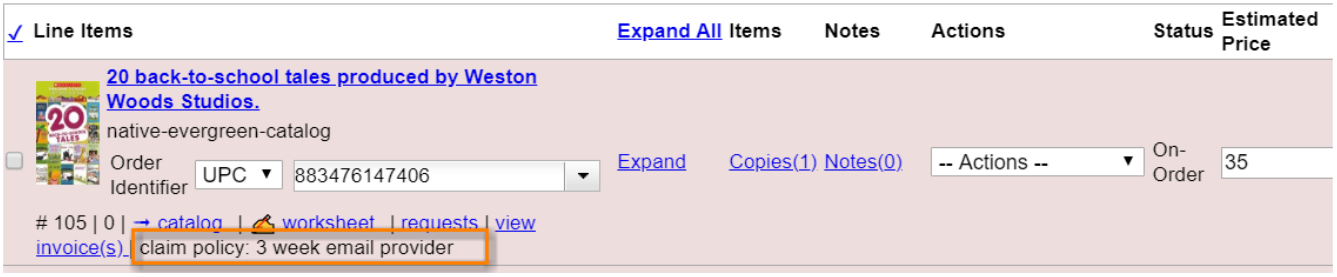
5. Select your printer and click **OK**.

Chapter 13. Claiming

Evergreen uses claim policies to compile a list of claim-ready items based on order date. All claiming is currently manual; electronic claiming is not available

13.1. Claim Policies

The default claim policy associated with each Provider is automatically assigned to line items and copies ordered from the provider.



Apply or Change a Line Item Claim Policy

1. Open your purchase order.
2. Check the check boxes adjacent to each line item you would like to apply the claim policy to.
3. Click **Actions → Apply Claim Policy to Selected Line Items**.
4. Choose a **Claim policy** from the drop down menu.
5. Click **Save**.
6. The new claim policy will be applied to the line item(s).

You can change the claim policy that has been applied to a line item until the item is marked as received.

13.2. Claim-Ready Items

Evergreen can produce a list of items, by ordering branch, which are ready to be claimed. You can use this list to manually claim items from your provider without having to open the purchase orders.

If an item has not been received and meets the conditions for claiming, the item will be eligible for claiming.

Batch Claiming of Claim-Ready Items

1. Click **Acquisitions → Claim-Ready Items**.

2. Any items that meet the conditions for claiming will appear.
    a. Any items being claimed with the same claim type (claim reason) can be claimed at the same time.
3. Check the box(es) adjacent to the line item(s) you wish to claim.
4. Click **Claim selected items**.
    a. From the **Claim Type** drop down menu select the reason you are making the claim.
    b. Enter a note (optional) and click **Claim**.
5. Claim vouchers for the claimed items will appear.
6. Click **Print** to save or print out your vouchers.
    a. The voucher can be mailed or emailed to the provider to initiate the claim.

Claim a Line Item from the Purchase Order

1. Open your purchase order.
2. Using the **Actions** menu on the line item
3. Click **Actions → Claims (0 existing)**
4. Check the boxes adjacent to the copies you wish to claim and click **Claim Selected**.
5. From the **Claim Type** drop down menu select the reason you are making the claim.
6. Enter a note (optional) and click **Claim**.
7. Claim vouchers for the claimed items will appear.
8. Click **Print** to save or print out your vouchers.
    a. The voucher can be mailed or emailed to the provider to initiate the claim.

Claim a Copy from the Purchase Order

1. Open your purchase order.
2. Click the **Copies** link on the line item containing the copy or copies you wish to claim.
3. Click the **Claim** link adjacent to the copy you wish to claim.
4. Use the check boxes to select any additional copies you wish to claim and then click **Claim selected**.
5. From the **Claim Type** drop down menu select the reason you are making the claim.
6. Enter a note (optional) and click **Claim**.
7. The number of existing claims on the line item updates and a claim voucher appears.
    a. The voucher can be printed and mailed to the provider to initiate the claim.

Manual claiming can be done for both line items and individual copies. You can manually claim a line item or copy any time after it has been ordered until it is received. Line items or copies that have been suspended can be claimed.

13.3. Claim Vouchers

Claim vouchers can be saved and emailed to providers to initiate claims. These vouchers can be printed at the time of the manual claim in the system or reprinted at a later time through the copies link.

View, Save or Print Claim Vouchers

1. Open a purchase order.
2. Click the **Copies** link on the line item containing the copy or copies you wish to view the claim voucher for.
3. Click the **Claim** link adjacent to any of the copies.
4. The claim type (claim reason) will display with a **Show Voucher** link.
5. Click the **Show Voucher** link.
    a. View the voucher on screen.
    b. Save the voucher as a PDF.
    c. Print the voucher.

Claim vouchers contain the following information:

- **Claim Type (Claim Reason)**
- **Title and Author of item**
- **Event Type**: The action to be performed by the library to claim the item.
- **Event Date**: The date the item was claimed in Evergreen.
- **Order Date**: The date the purchase order for the item was activated.
- **Expected receive date**: (Not currently functional)
- **Initiated by**: The name of the staff member who manually claimed the item in Evergreen.
- **Barcode**: In most cases this will be a temporary system-generated barcode.
- **Fund**: The name of the fund being used to purchase the item.

Chapter 14. Cancel / Delay Acquisitions

You can cancel or delay individual copies, line items, or entire purchase orders.

Certain cancel reasons are used to delay acquisitions. These cancel reasons are set to keep the debits when the purchase order is cancelled. For example, a cancel reason such as **Delayed:Postponed**, for which debits are kept, indicates that the item will still be purchased when published. The funds remain encumbered for the purchases while the copy, line item, or purchase order has the status of cancelled. See Cancel Reasons for a full list.

NOTE	If a hold has been placed for an item that is cancelled through acquisitions, the system will cancel the hold. The cancelled hold will appear in the patron's account under cancelled holds as a staff forced hold.

Cancel a Purchase Order

1. Open a purchase order.
2. Click **Cancel order**.
3. Select a Reason from the drop down menu.
    a. Choose a reason that begins with **Canceled**
4. Click **Cancel order**.
5. A pop up will appear asking you to confirm that you wish to cancel the purchase order.
6. Click **OK**.
7. The status of the purchase order becomes Canceled and all the line items colour changes to white.
    a. The funds no longer show as encumbered for the purchase order.

Delay a Purchase Order

1. Open a purchase order.
2. Click **Cancel order**.
3. Select a Reason from the drop down menu.
    a. Choose a reason that begins with **Delayed**
4. Click **Cancel order**.
5. A pop up will appear asking you to confirm that you wish to cancel the purchase order.
6. Click **OK**.
7. The status of the purchase order becomes Delayed and all the line items colour changes to blue.
    a. The funds are still encumbered.
    b. A delayed purchase order is resolved when all the items are marked as received.
    c. A delayed purchase order can be canceled. You can mark a purchase order as delayed, and if

later, the order cannot be filled, you can change the cancel reason to canceled. When delayed purchase orders are canceled, the encumbrances are deleted.

NOTE	You can only cancel or delay purchase orders where all line items are in a state of on-order.

Cancel a Line Item

1. Open a purchase order.
2. Check the check box(es) of the line item(s) you wish to cancel.
3. Click **Actions** → Select **Cancel Selected Line Items**.
4. Select a Reason from the drop down menu.
    a. Choose a reason that begins with **Canceled**
    b. If line items are being cancelled for different reasons they will need to be cancelled separately so different cancel reasons can be used.
5. Click **Cancel Line Items**.
6. A pop up will appear asking you to confirm that you wish to cancel the line item.
7. Click **OK**.
8. The status of the line item becomes Canceled and the colour changes to white.
    a. The funds for the particular line item will no longer be encumbered.

Delay a Line Item

1. Open a purchase order.
2. Check the check box(es) of the line item(s) you wish to delay.
3. Click **Actions** → Select **Cancel Selected Line Items**.
4. Select a Reason from the drop down menu.
    a. Choose a reason that begins with **Delayed**
    b. If line items are being delayed for different reasons they will need to be delayed separately so different cancel reasons can be used.
5. Click **Cancel Line Items**.
6. A pop up will appear asking you to confirm that you wish to cancel the line item.
7. Click **OK**.
8. The status of the line item becomes Delayed and the colour changes to blue.
    a. The funds for the line item are still encumbered.
    b. A delayed line item is resolved when the line item is marked as received.
    c. A delayed line item can be canceled. You can mark a line item as delayed, and if later, the order cannot be filled, you can change the cancel reason to canceled. When delayed line items are canceled, the encumbrances are deleted.

NOTE	You can only cancel or delay line items that are in a state of on-order.

Cancel a Copy

1. Open a purchase order.
2. Click the **Copies** link on the line item containing the copy or copies you wish to cancel.
3. Click the **Cancel** link adjacent to the copy you wish to cancel.
    a. Copies must be cancelled individually.
4. Select a Reason from the drop down menu.
    a. Choose a reason that begins with **Canceled**
5. Click **Cancel copy**.
6. A pop up will appear asking you to confirm that you wish to cancel the copy.
7. Click **OK**.
8. The status of the copy becomes Canceled.
    a. The line item bar will only change to white and have a status of cancelled if all copies for the line item have been cancelled.
    b. The funds for the copy will no longer be encumbered.

Delay a Copy

1. Open a purchase order.
2. Click the **Copies** link on the line item containing the copy or copies you wish to delay.
3. Click the **Cancel** link adjacent to the copy you wish to delay.
    a. Copies must be delayed individually.
4. Select a Reason from the drop down menu.
    a. Choose a reason that begins with **Delayed**
5. Click **Cancel copy**.
6. A pop up will appear asking you to confirm that you wish to cancel the copy.
7. Click **OK**.
8. The status of the copy becomes Delayed.
    a. The line item bar will only change to blue and have a status of Delayed if all copies for the line item have been delayed.
    b. The funds for the copy are still encumbered.
    c. A delayed copy is resolved when the copy is marked as received.
    d. A delayed copy can be canceled. You can mark a copy as delayed, and if later, the order cannot be filled, you can change the cancel reason to canceled. When delayed copies are canceled, the encumbrances are deleted.

NOTE	You can only cancel or delay copies that are in a state of on-order.

Acquisitions Administration

Chapter 15. Acquisitions Module Configuration

Before beginning to use Acquisitions, the following must be configured by an acquisitions administrator:

Acquisitions Initial Set-up

1. Set up your funding sources.
2. Apply credit to your funding sources.
3. Set up your funds.
4. Allocate money to your funds.
5. Set up your providers.
6. (optional) Set up your EDI accounts.
7. (optional) Set up your claim policies.
8. (optional) Set up your distribution formulas.
9. (optional) Set up your line item alerts.

Multi vs Single Branch Library

- The context org unit is the org unit responsible for placing and managing the order. It defines what org unit settings (eg copy locations) are in scope, what fiscal year to use, who is allowed to view/modify the PO, where the items should be delivered and the EDI SAN.
    - Multi-branch systems uploading records for multiple branches should choose the system.
    - Single branch libraries or branches responsible for their own orders should choose the branch.

Chapter 16. Fund Administration

16.1. Funding Sources

In the funding sources interface you can create funding sources, allocate credit to funding sources, and apply credit to funds. Funding sources allow you to specify the sources that contribute monies to your fund(s), such as your municipal government, grants, and donations. You can create as few or as many funding sources as you need.

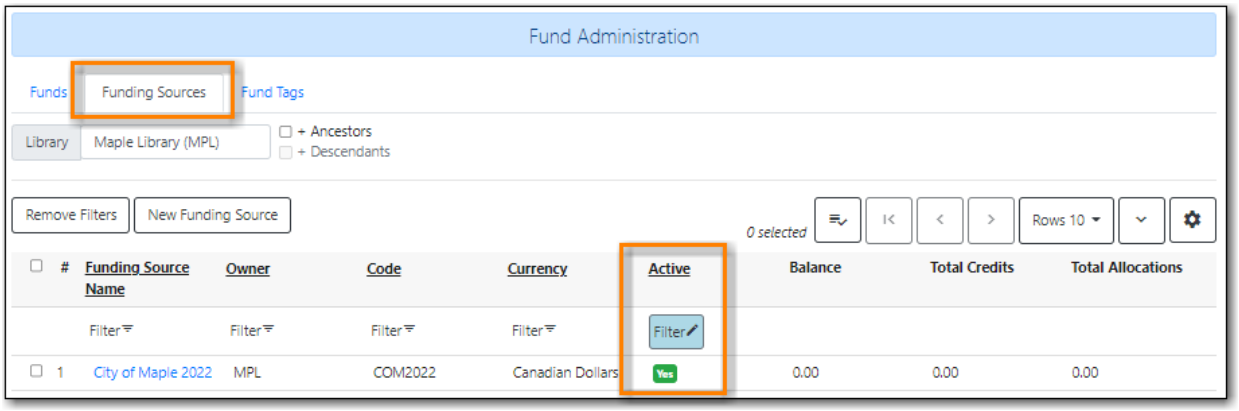
TIP

Funding sources are not tied to fiscal or calendar years, but since any unspent money is returned to the funding source during the year end process Co-op Support recommends that you create new funding sources for each year and de-active funding sources when they are no longer in use. To distinguish the funding sources from year to year, best practice is to include the year in the funding source name and code. For example, City of Fiction 2022 and COF2022.

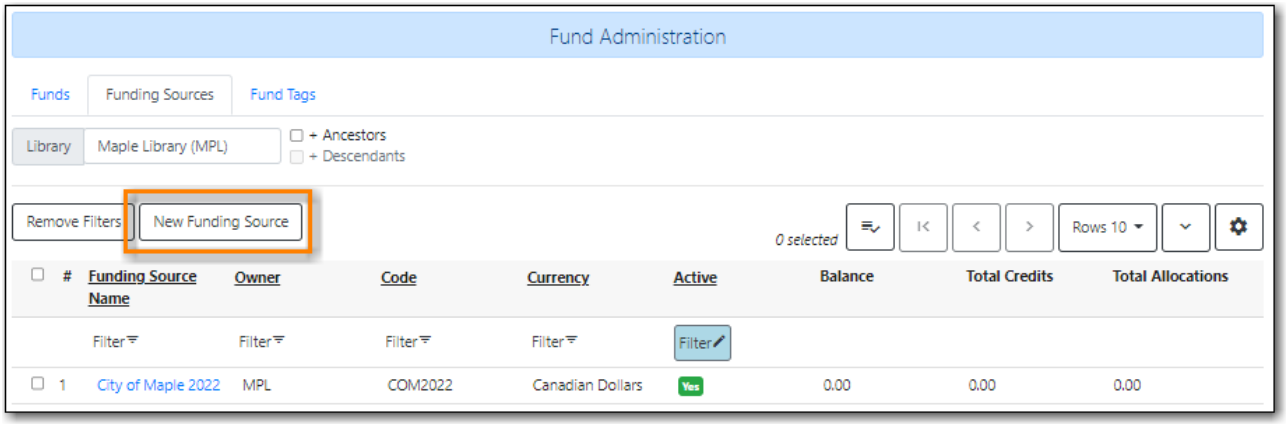
16.1.1. Creating Funding Sources

Sitka Training Video - Creating Funding Sources (1:29)

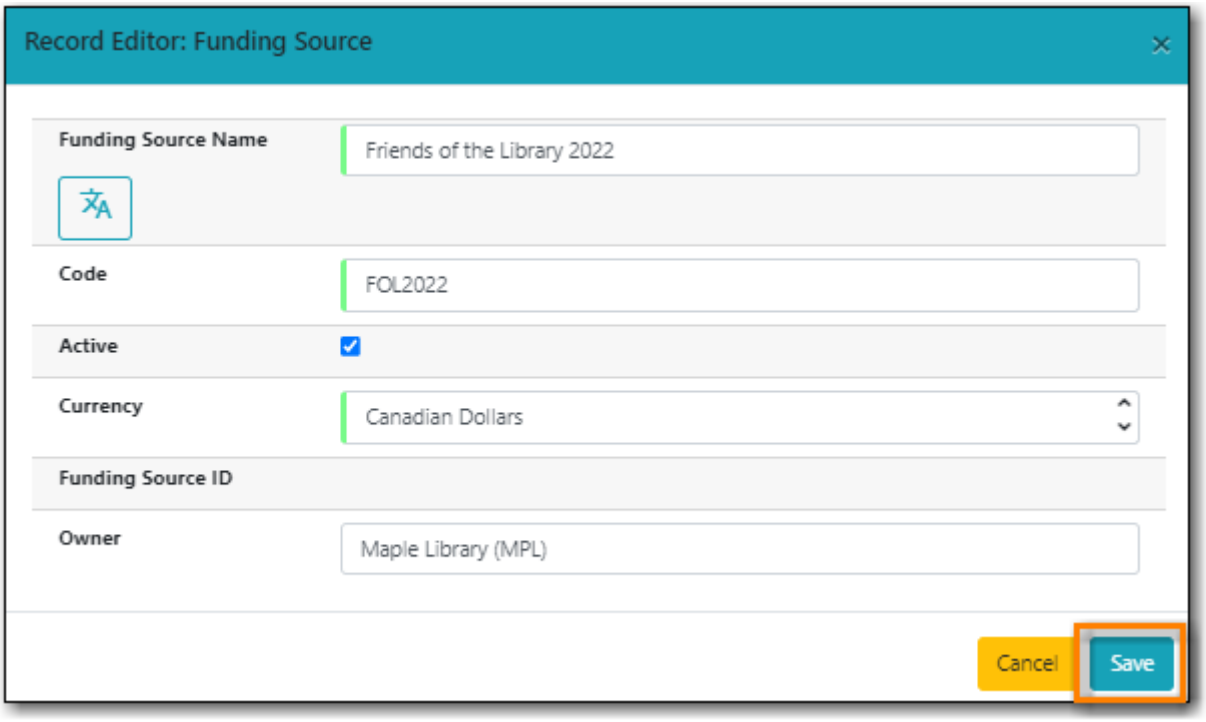
1. Go to **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funding Sources** tab.
   a. By default Evergreen filters so that only active funding sources display.



3. Click **New Funding Source**.



4. Enter a name for your funding source.
5. Enter a unique Code for the source.
6. The funding source will be *Active* by default.
7. Select a currency from the drop down menu.
8. Owner will default to your workstation.
    a. Multi-branch libraries may wish to set the Owner as their system rather than a specific branch.
9. Click **Save**.



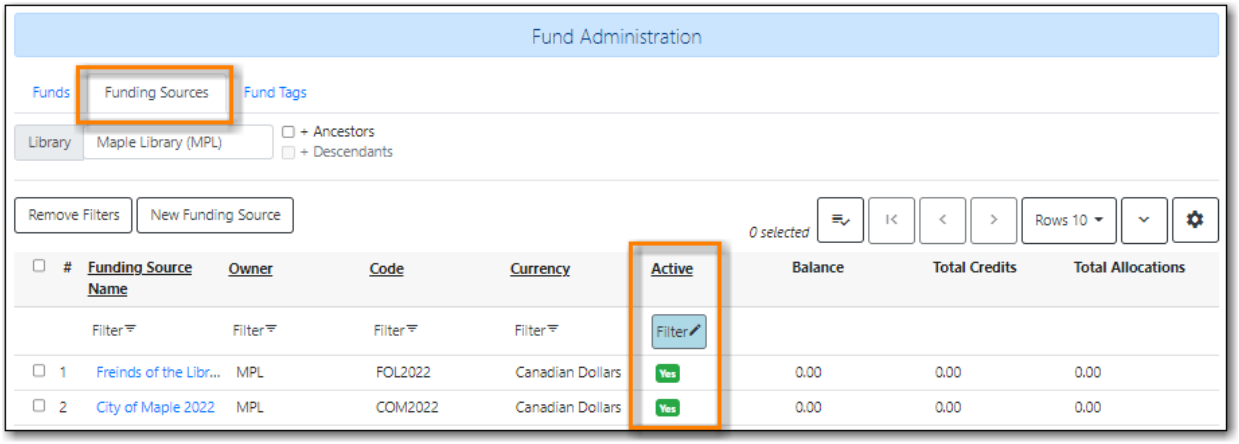
10. Your funding sources is created and displays in the list.
11. You can now apply credit. See Applying Credit.

16.1.2. Editing a Funding Source

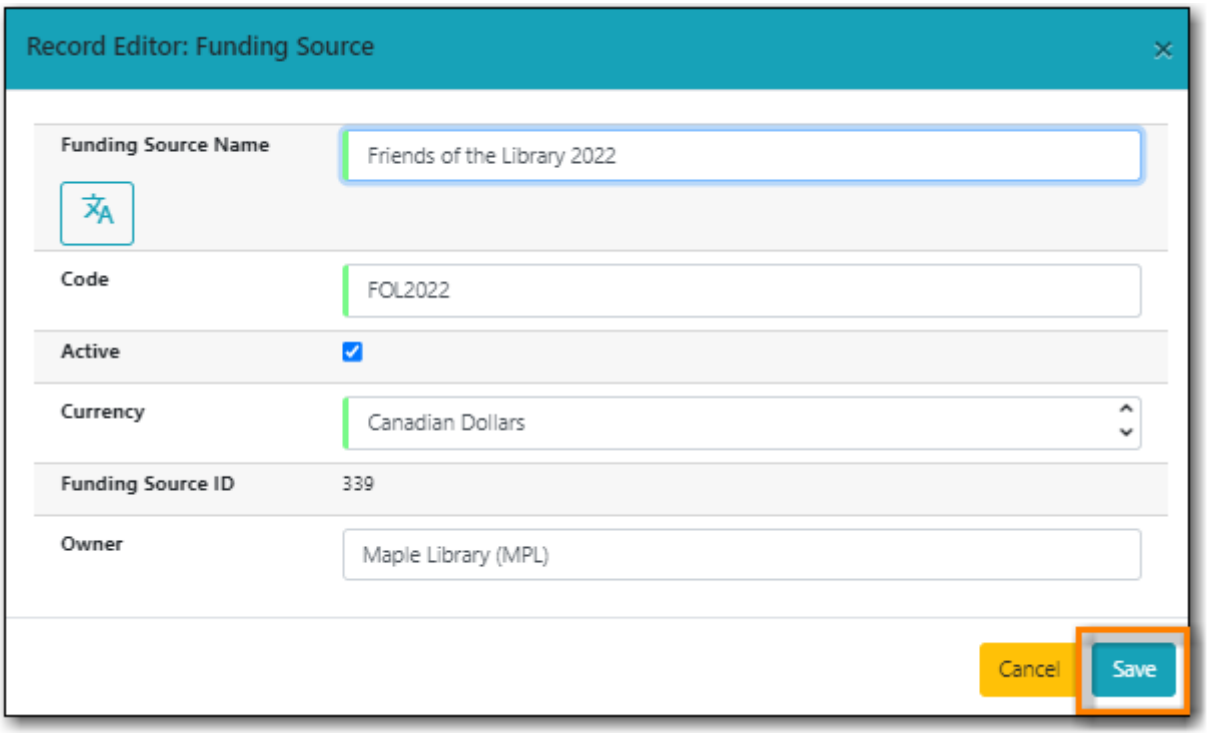
NOTE While you are able to edit your funding source's name, owner, code, currency, and active flag, you are unable to edit the balance of your funding source. The balance

of a funding source can only be altered by applying credit to the funding source or allocating credit from the funding source to a fund.

1. Go to **Administration → Acquisitions Administration → Fund Administration**.
2. Select the **Funding Sources** tab.
   a. By default Evergreen filters so that only active funding sources display.



3. Double-click on the row you would like to edit. A pop-up box will appear in which you can edit the fields.
4. Make your changes and click **Save**.



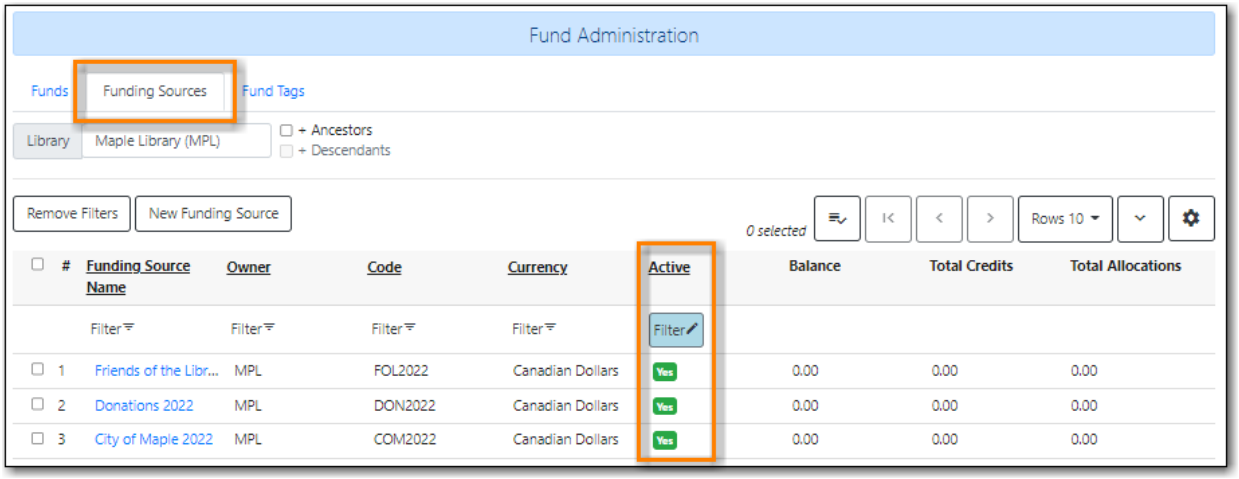
5. Your funding source is updated.

CAUTION Editing the currency of an active in use funding source is not recommended as it can have serious consequences.

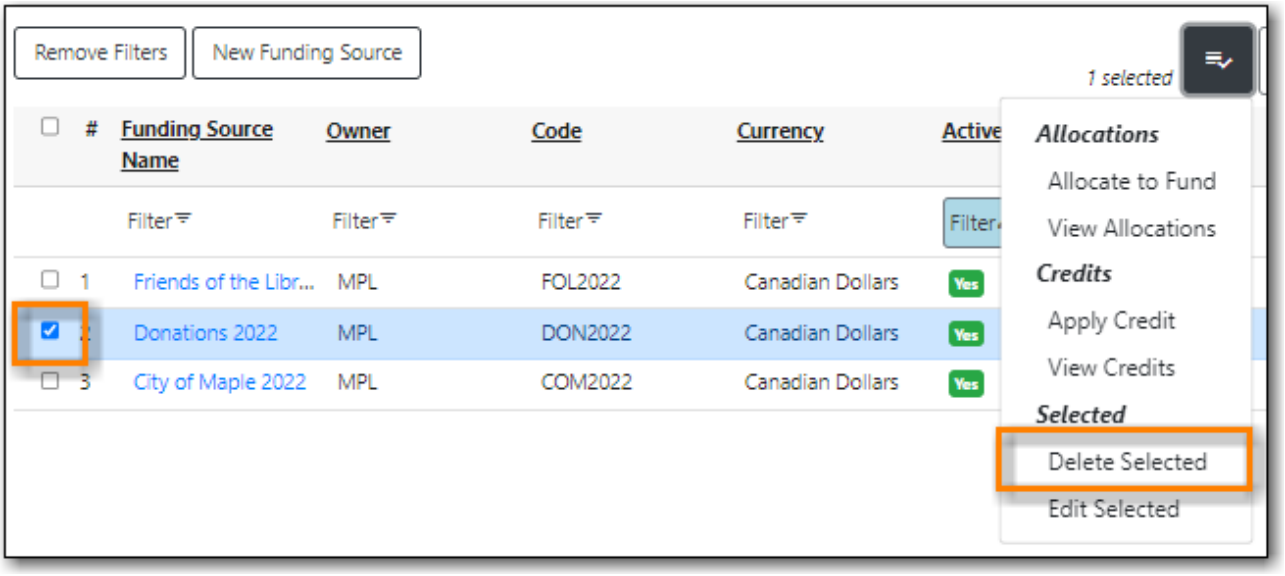
16.1.3. Deleting a Funding Source

CAUTION	A funding source can only be deleted if no credit has been applied to it.

1. Go to **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funding Sources** tab.
   a. By default Evergreen filters so that only active funding sources display.



3. Check the box of the funding source you wish to delete.
4. From the **Actions** menu select **Delete Selected**.



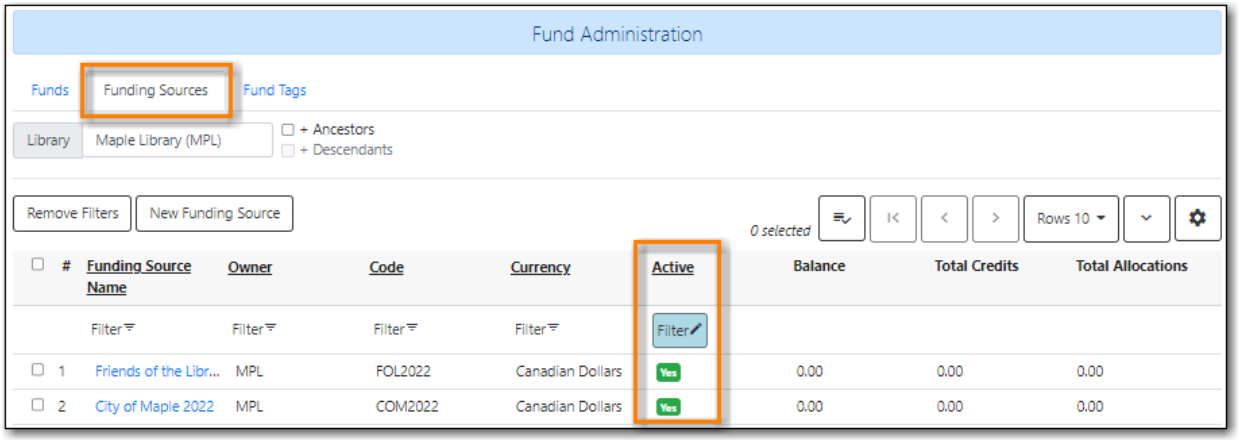
5. On the pop up that appears click **Confirm**.
6. The funding source is deleted.

16.1.4. Applying Credit

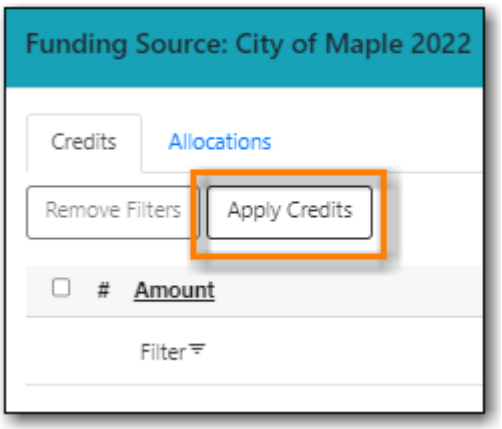
Sitka Training Video - Apply Credit to Funding Sources (1:40)

CAUTION	A funding source with credit applied cannot be deleted.

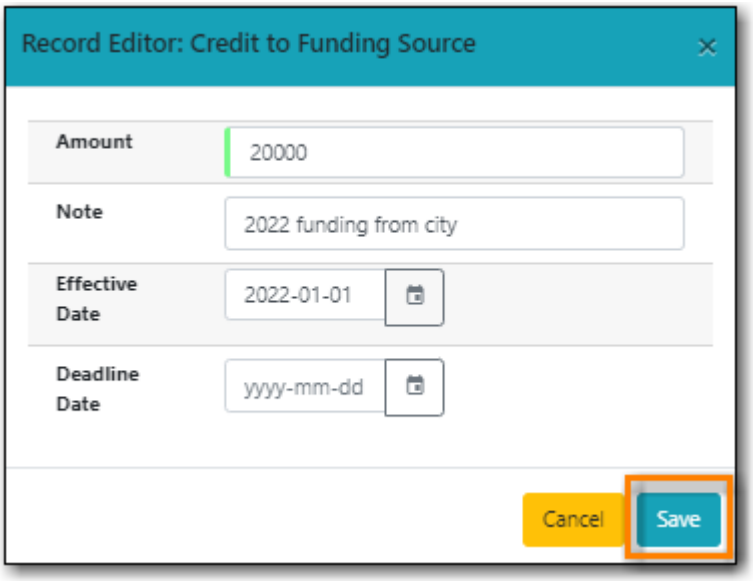
1. Go to **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funding Sources** tab.
   a. By default Evergreen filters so that only active funding sources display.



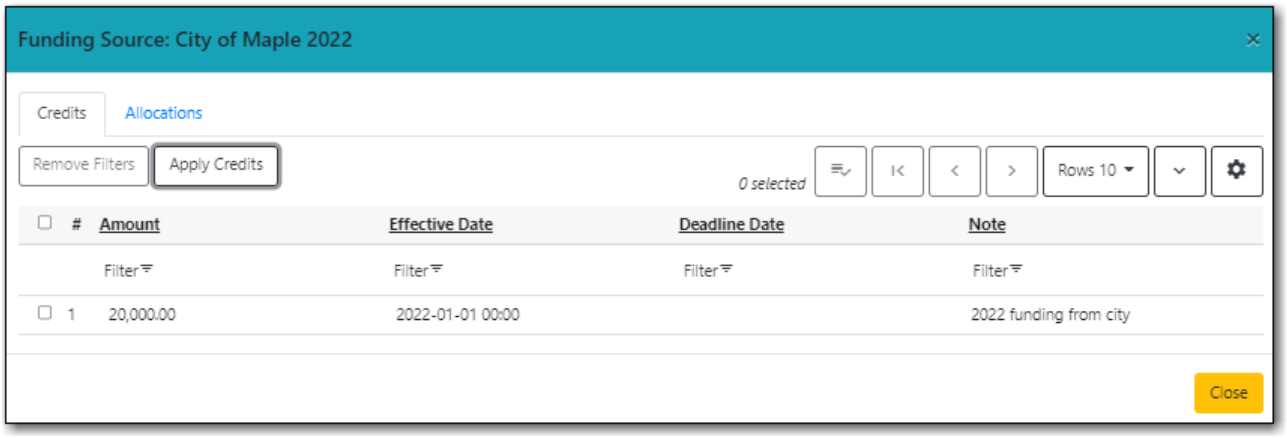
3. Click on the hyperlinked name of the funding source you would like to apply credit to.
4. On the **Credits** tab click **Apply Credits**.



5. Enter the amount to apply to this funding source.
6. Enter a note. This field is optional.
7. Enter an effective date if different from the current day.
8. Optionally, enter a deadline date by which the money must be spent.
9. Click **Save**.



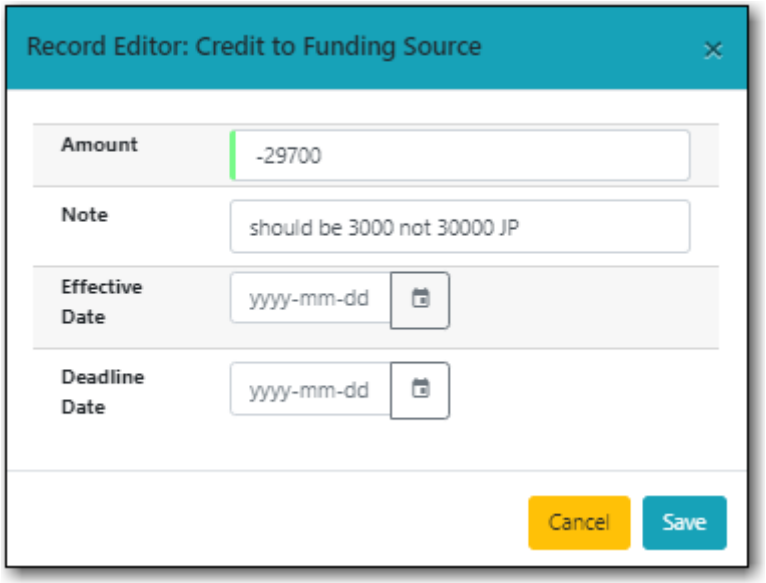
10. The **Credits** tab will update to reflect the credit applied.



11. Click **Close** to close the pop-up.

NOTE

If an incorrect amount of credit is applied you can apply a negative credit to correct it. Co-op Support recommends including a note with explanation in these cases.



16.1.5. Allocate Credit to Funds - Funding Source Tab

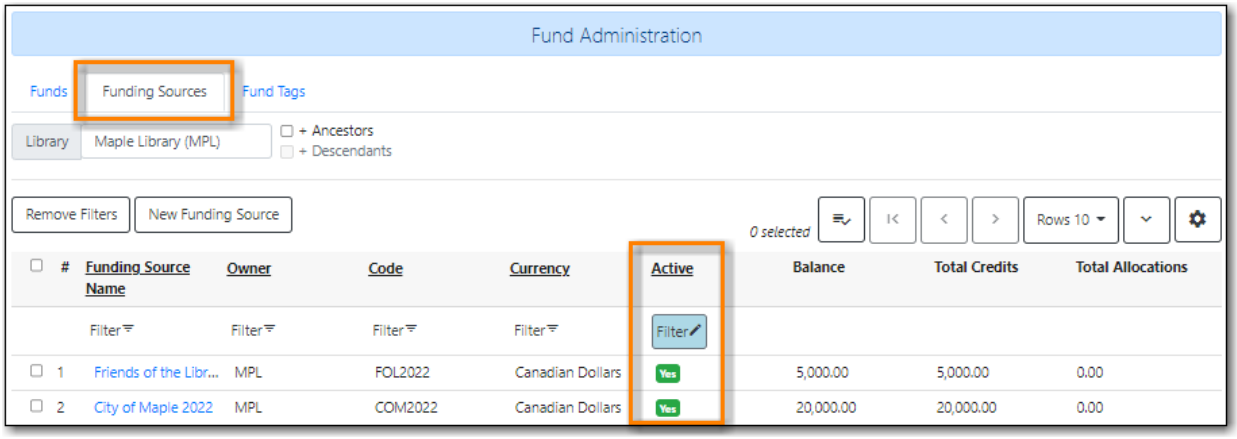
Sitka Training Video - Allocate Money to Funds (2:22)

Once you have set up your funds, credit can be allocated to them from your funding sources in two ways:

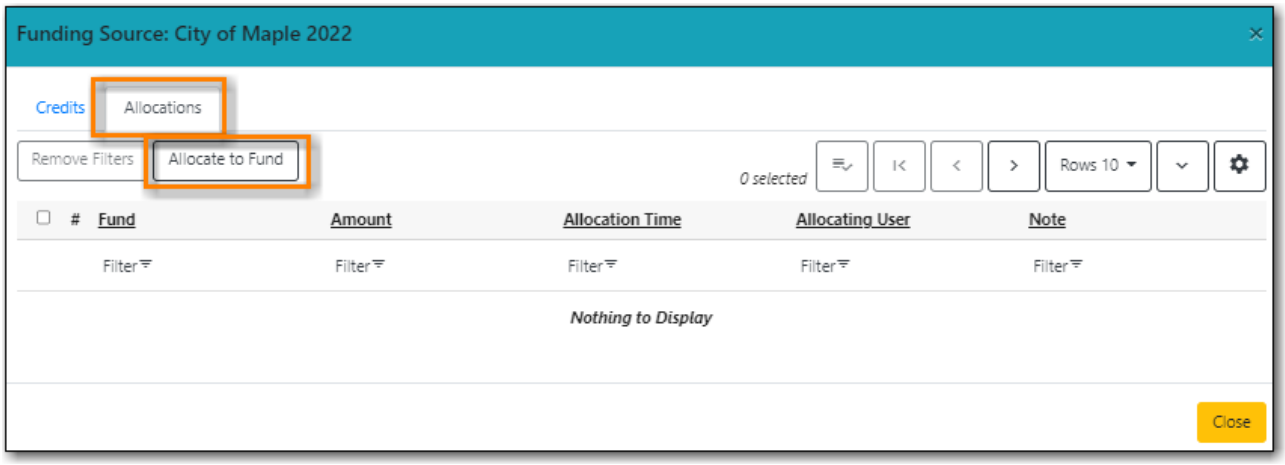
1. Allocate to Fund - Funding Source Tab
2. Allocate to Fund - Funds Tab

To allocate credit to your funds using the Funding Source Tab:

1. Go to **Administration → Acquisitions Administration → Fund Administration**.
2. Select the **Funding Sources** tab.
    a. By default Evergreen filters so that only active funding sources display.

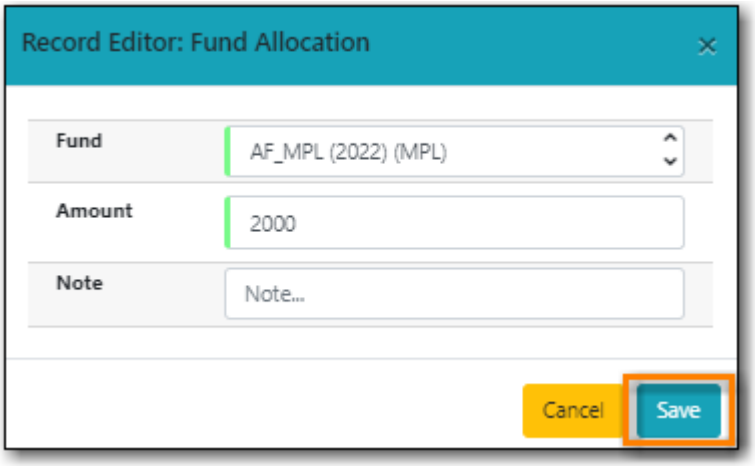


3. Click on the hyperlinked name of the funding source you'd like to allocate from.
4. Select the **Allocations** tab and click **Allocate to Fund**.

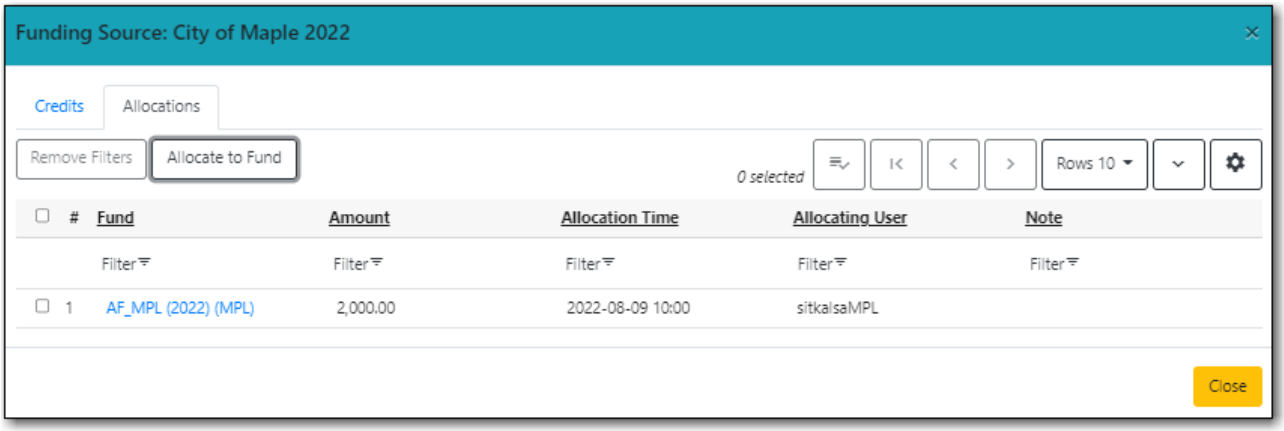


5. Select the fund you would like to allocate credit to.
    a. Only active funds will display in the drop down menu.

6. Enter the amount that you would like to allocate.
7. Enter a note. This field is optional.
8. Click **Save**.



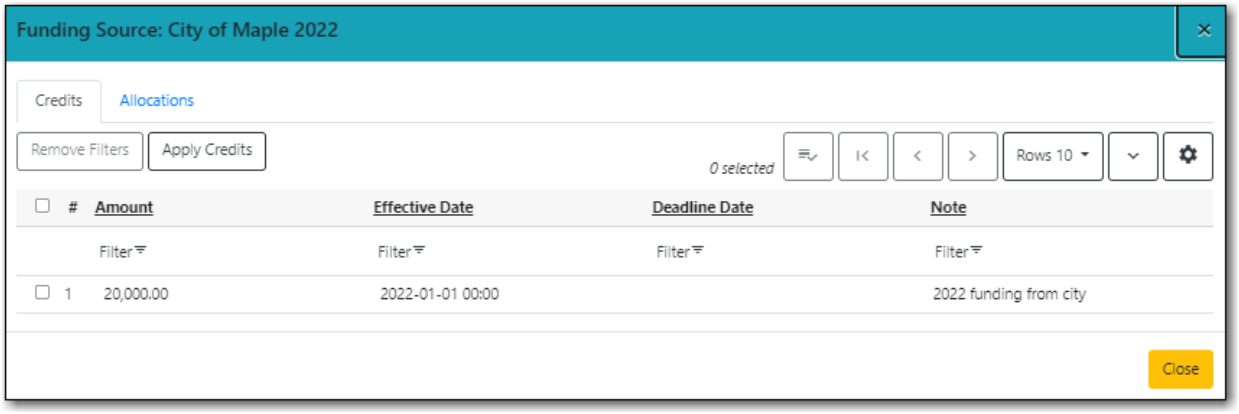
9. The **Allocations** tab will display all allocations made to funds out of this funding source. See Track Credits and Allocations for more information.



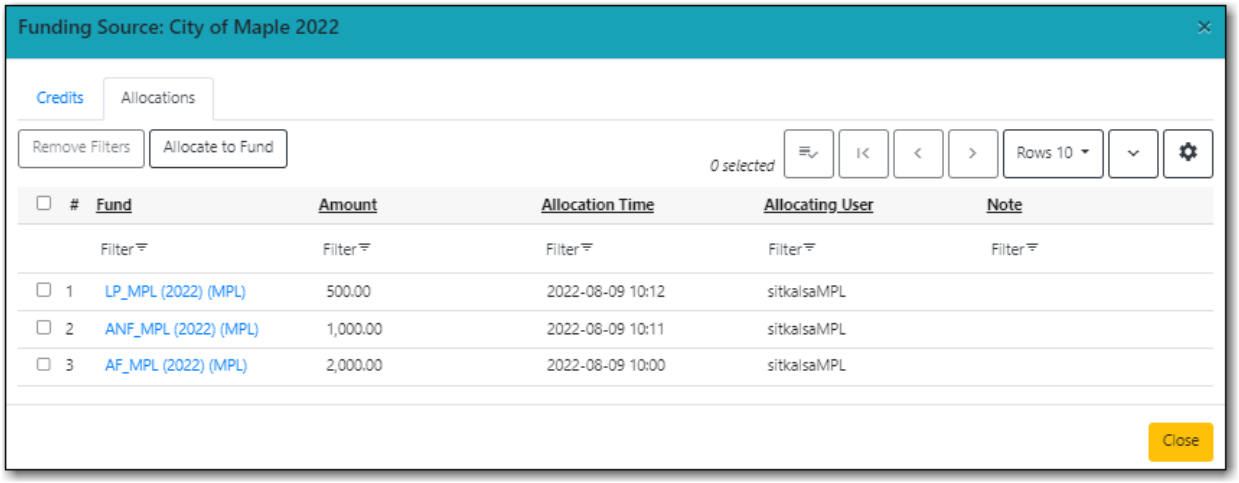
16.1.6. Track Credits and Allocations

You can track credits to and allocations from for each funding source through the Funding Source Details pop up.

1. Go to **Administration → Acquisitions Administration → Fund Administration**.
2. Select the **Funding Sources** tab.
3. Click on the hyperlinked name of the funding source to open the Funding Source Details pop up.
    a. **Credits** The Credits tab tracks all credits applied to the funding source.



b. **Allocations** - The Allocations tab tracks all allocations from the funding source to funds. Clicking on the hyperlinked fund name will open the Fund Details pop up in a new tab.



16.2. Funds

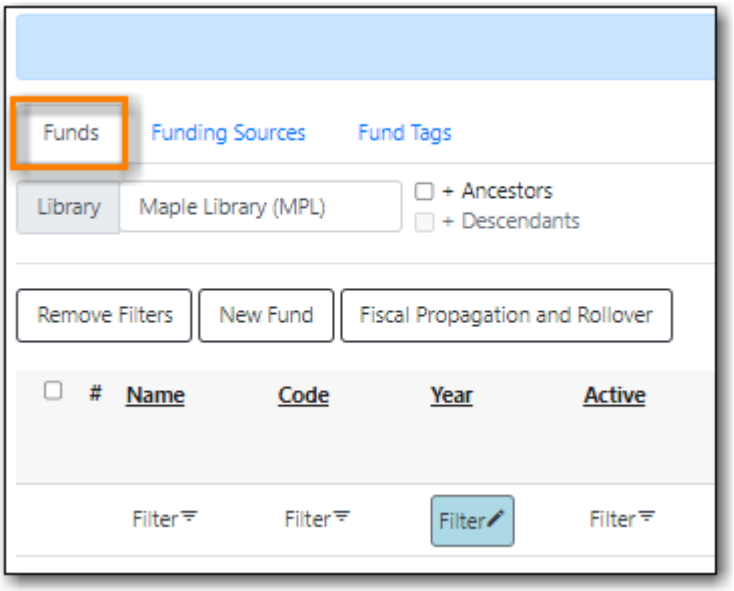
Funds should be created for every budget you wish to track. For some libraries this may be a fund per individual collection; other libraries may only use one fund for all purchasing. Libraries may want to create funds specifically for non-bibliographic purchases, such as processing supplies, or for other charges such as charges for MARC records.

Multi-branch libraries may have a single set of funds for their entire system, a set of funds for each branch, or may use a combination of funds at the branch and system levels.

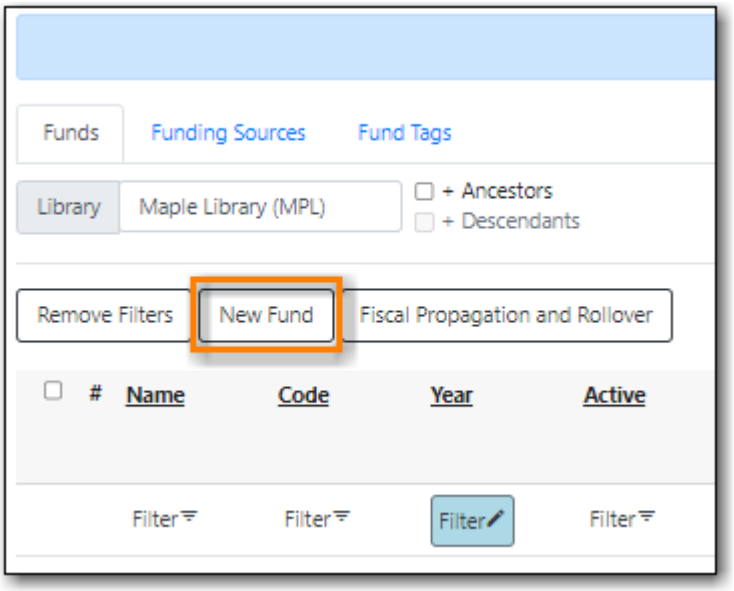
16.2.1. Creating Funds

NOTE	Funds should be created when your library first starts using acquisitions and when you want to track a new budget. Funds for subsequent fiscal years are created automatically by Evergreen during the year end processes.

1. Go to **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funds** tab.



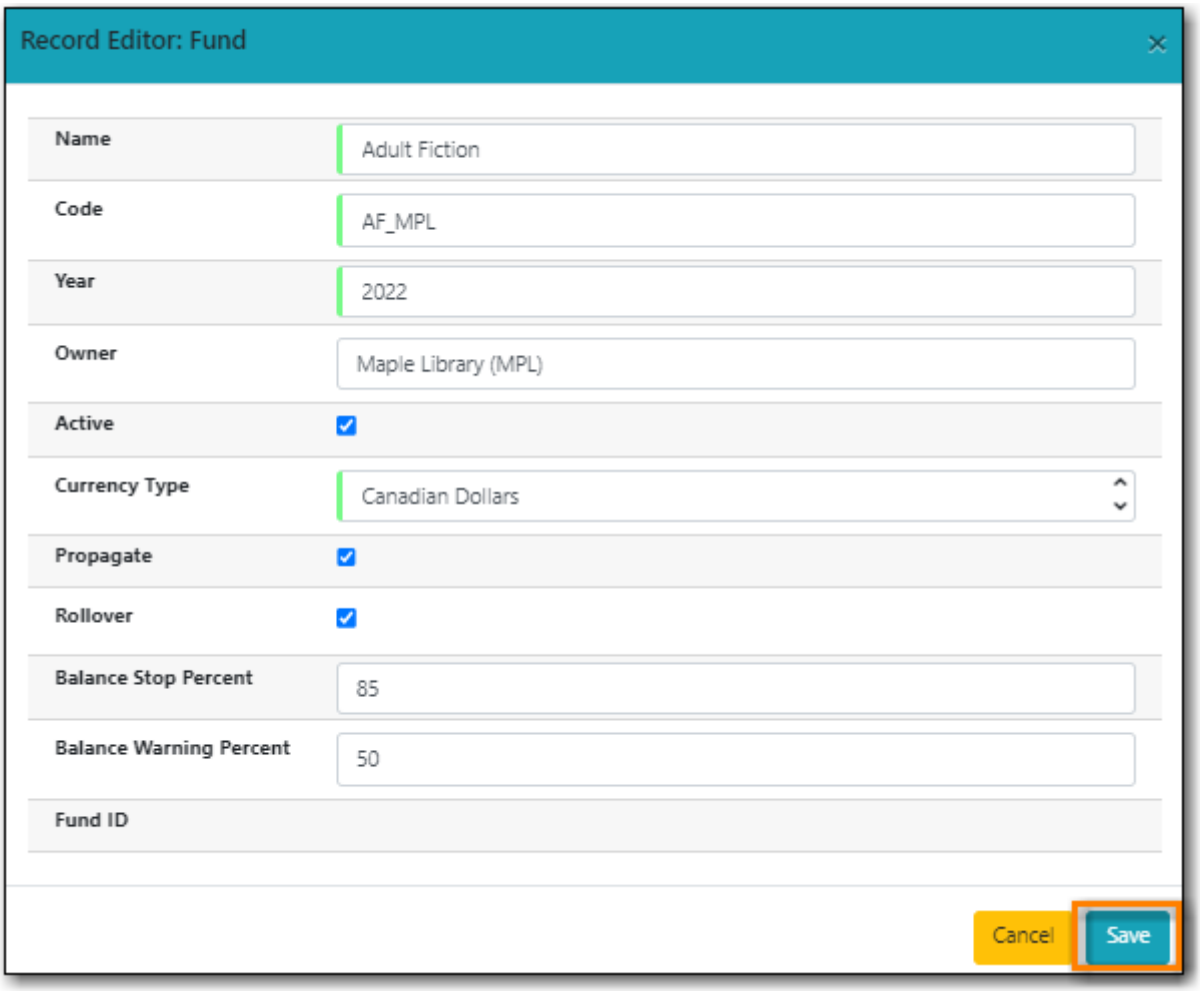
3. Click **New Fund**.



4. Enter a name for the fund. There is no limit to the number of characters that can be entered in this field.
5. Create a unique code for the fund.
    a. Please add your library short code to the end of all fund codes. For example, AF_MPL
6. Enter a year for the fund. This can be a fiscal year or a calendar year. The format of the year is YYYY.
7. The fund owner will default to your workstation.
    a. In a multi-branch system funds may be set to the top organizational unit, the organizational units for branches, or a combination.
8. The fund will be *Active* by default. You cannot make purchases from an inactive fund.
9. Select a currency type from the drop down menu. When a fund is applied to a line item or copy the price of the item will be encumbered in the currency associated with the fund.
10. Check the propagate box if you will want to propagate this fund. When you propagate a fund,

Evergreen creates a new fund for the following fiscal year with the same parameters as your current fund. All of the settings transfer except for the year and the amount of money in the fund. Propagation occurs during the fiscal year close-out operation.

11. Check the Rollover box if you would like to roll over remaining funds and/or encumbrances during the fiscal year close-out operation into the same fund for the next year.
12. Optionally, enter a Balance Stop Percent. The balance stop percent prevents you from making purchases when only a specified amount of the fund remains. For example, if you want the fund to stop purchases after 95% of the fund has been spent, then you would enter 95 in the field. When the fund reaches its balance stop percent, it will appear in red when you apply funds to line items.
    a. If this field is left blank it is possible to overspend the fund.
    b. The balance stop percent can be adjusted as needed throughout your fiscal year.
13. Optionally, enter a balance warning percent. The balance warning percent gives you a warning that the fund is low. You can specify any percent. For example, if you want to be warned when 50% of the fund has been spent, then you would enter 50 in the field. When the fund reaches its balance warning percent, it will appear in yellow when you apply funds to line items.
    a. The Balance Warning Percent can be adjusted as needed throughout your fiscal year.
14. Click Save.

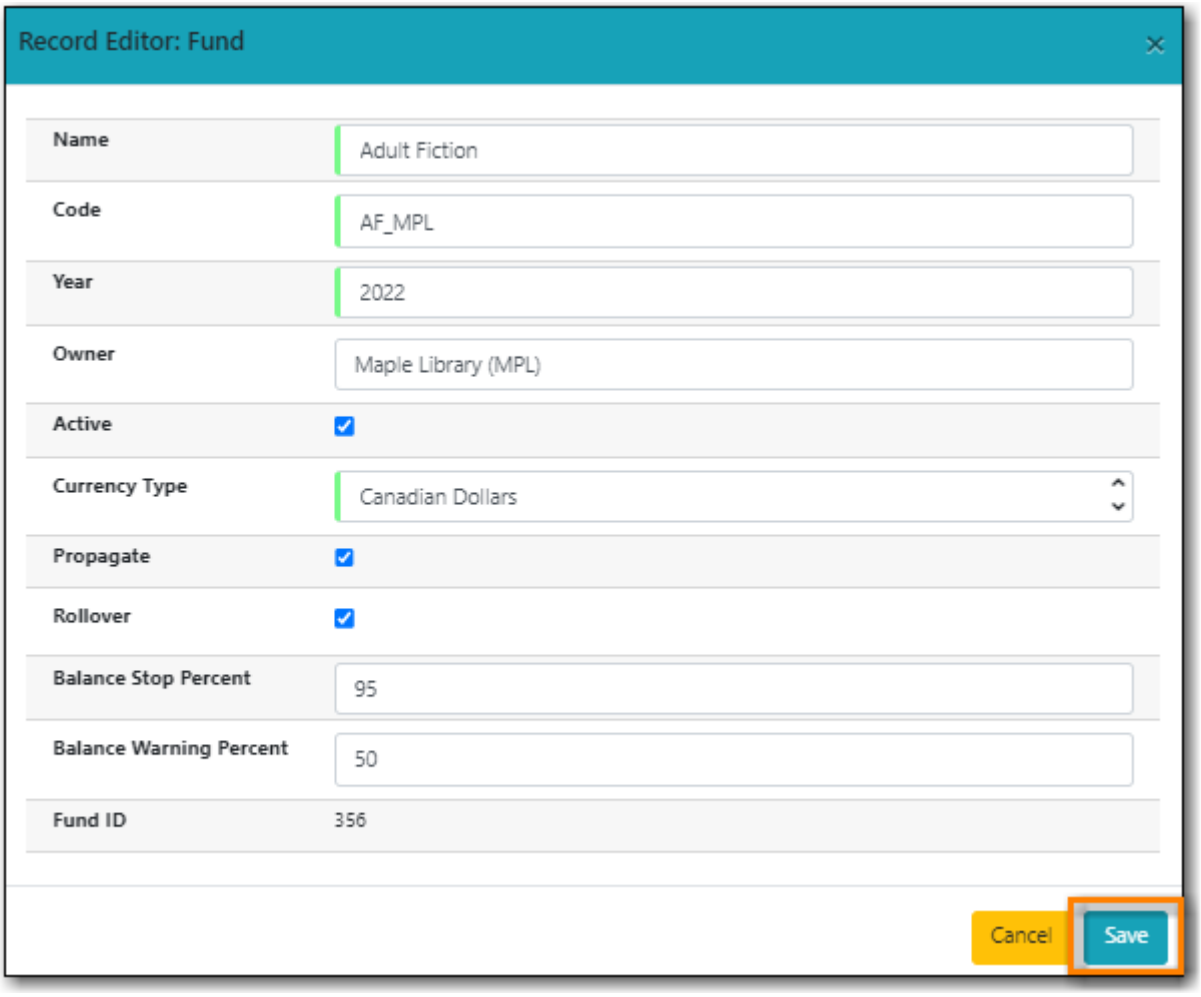


15. Your fund will be created. Repeat this process to create additional funds.

16.2.2. Editing a Fund

CAUTION	Never edit the currency of an active in-use fund. You also cannot edit the the balance of your fund through the Edit function. A fund's balance must be adjusted by allocating monies to the fund or transferring monies to another fund.

1. Go to **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funds** tab.
3. Double-click on the row you would like to edit. A pop-up box will appear in which you can edit the fields.
4. Make your changes and click **Save**.

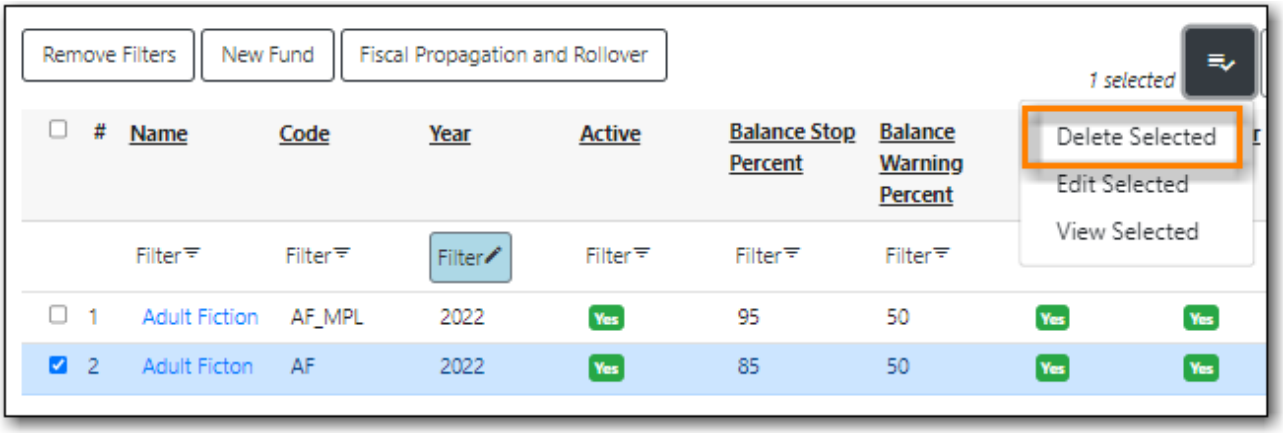


5. Your fund will be updated.

CAUTION	If you load vendor records make sure you let your vendors know about any changes you make to fund codes that are used in their templates. If the fund code doesn't match between Evergreen and the $f in the templates your MARC records will not load.

16.2.3. Deleting a Fund

1. Go to **Administration → Acquisitions Administration → Fund Administration**.
2. Select the **Funds** tab.
3. Check the box of the fund you wish to delete.
4. From the **Actions** menu select **Delete Selected**.



5. The fund is deleted.

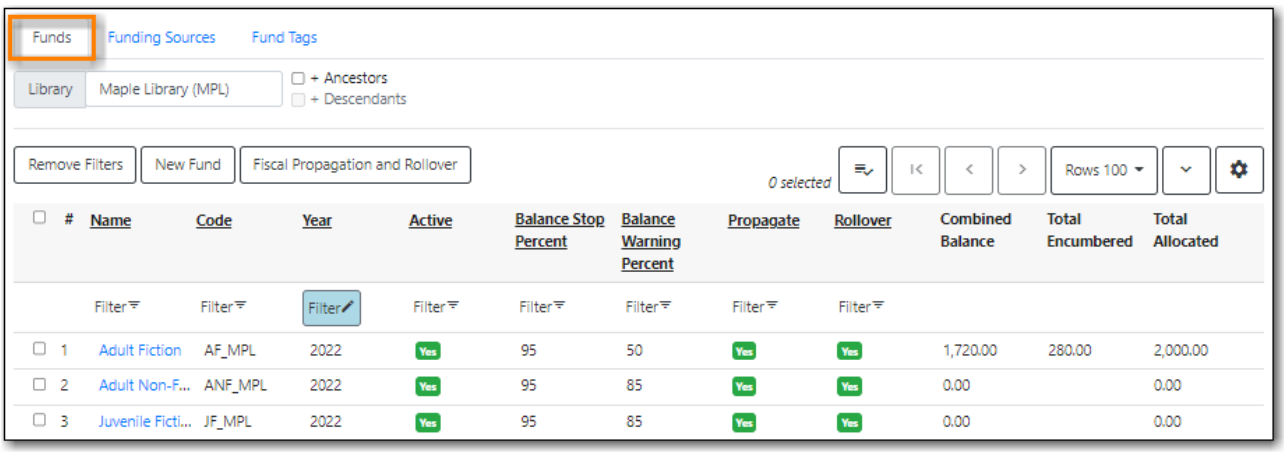
NOTE A fund can only be deleted if no credit has been allocated to it.

16.2.4. Allocate to Funds - Funds Tab

Sitka Training Video - Allocate Money to Funds (2:22)

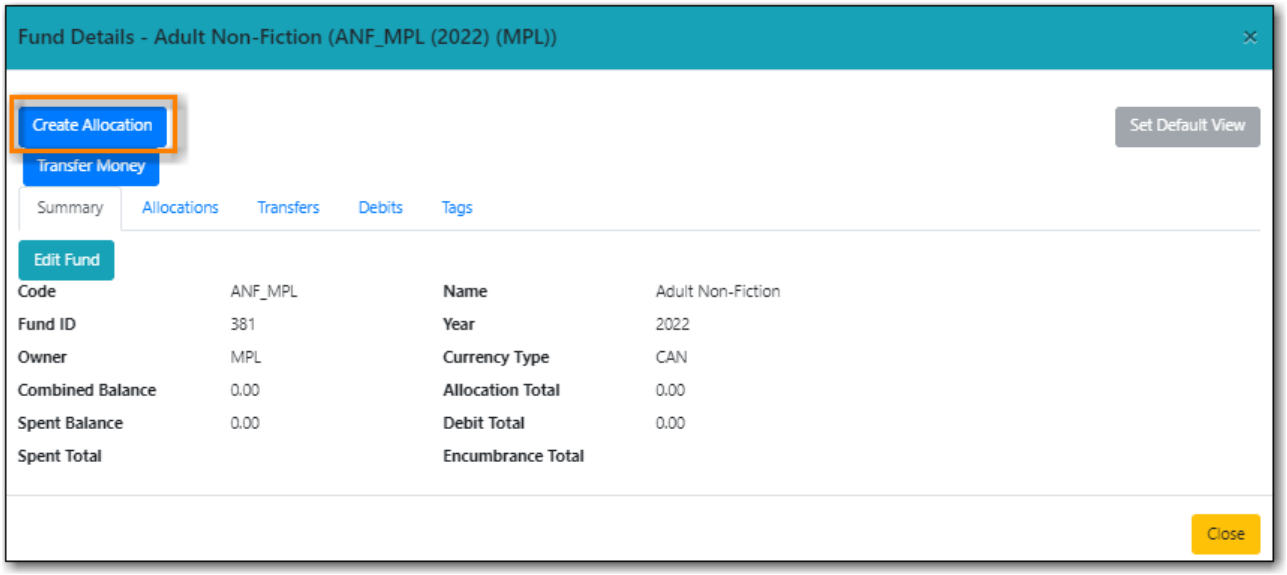
To allocate credits using the Fund Tab:

1. Go to **Administration → Acquisitions Administration → Fund Administration**.
2. Select the **Funds** tab.

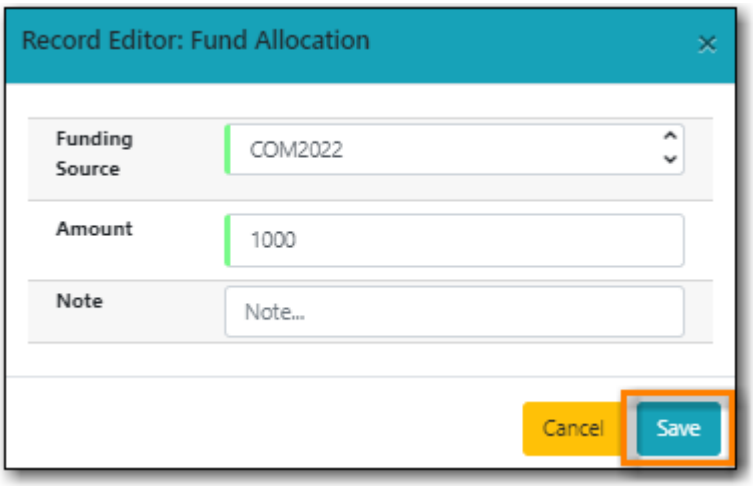


3. Click the hyperlinked name of the fund. The Fund Details pop up will appear.

4. Click **Create Allocation**.



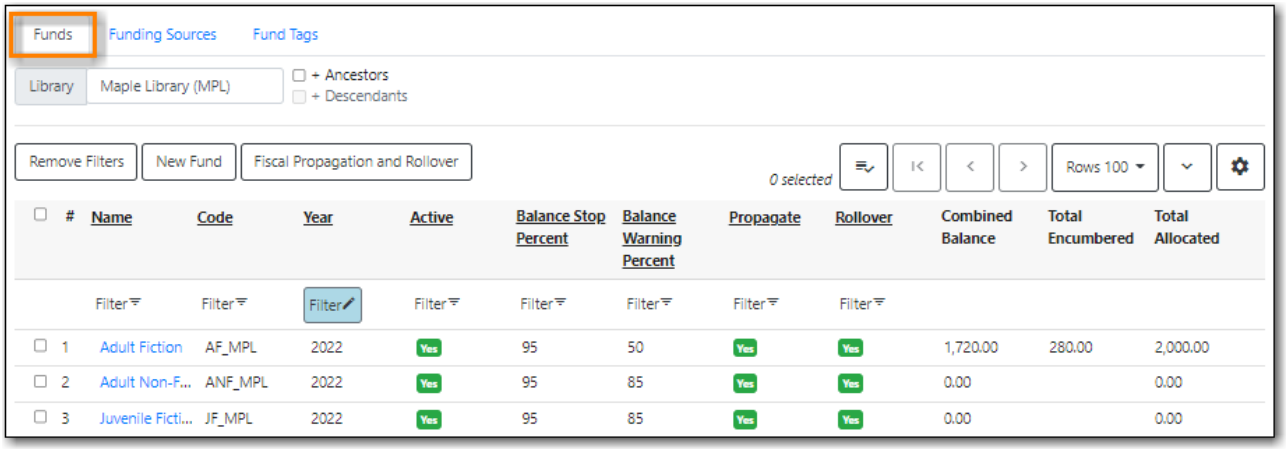
5. Choose the Funding Source from the drop down menu.
6. Enter the amount you would like to apply to the fund from the funding source.
7. Enter a note. (Optional).
8. Click **Save**.



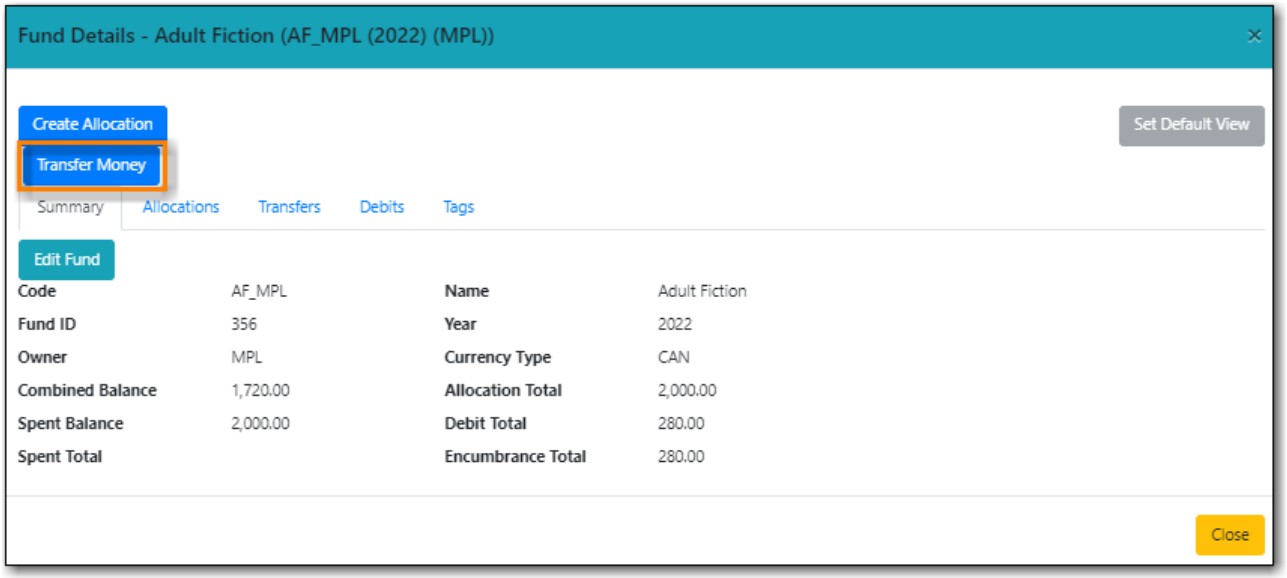
16.2.5. Transfer Money Between Funds

The credits that you allocate to funds can be transferred between funds if desired. The system tracks these transfers.

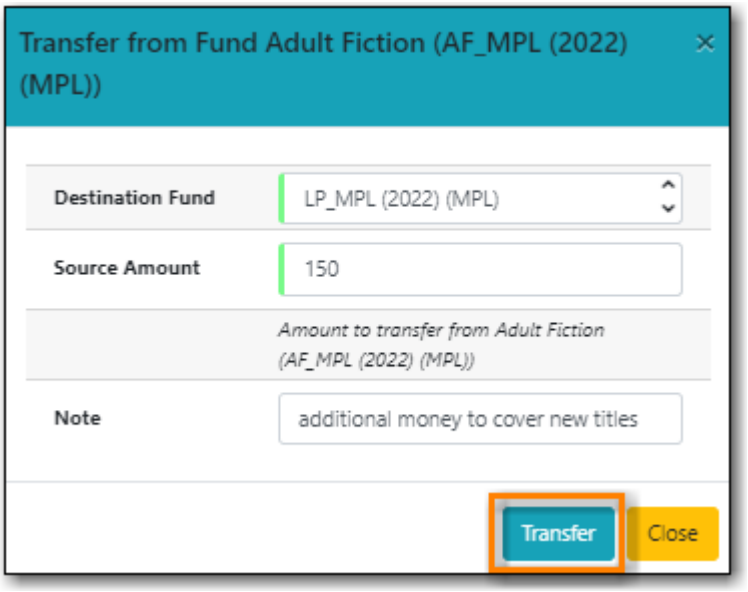
1. Select **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funds** tab.



3. Click the hyper linked name of the fund. The Fund Details pop up will appear.
4. Click **Transfer Money**.



5. Enter the amount you would like to transfer.
6. From the drop down menu, select the code of the destination fund.
7. Enter a note. (Optional).
8. Click **Transfer**.

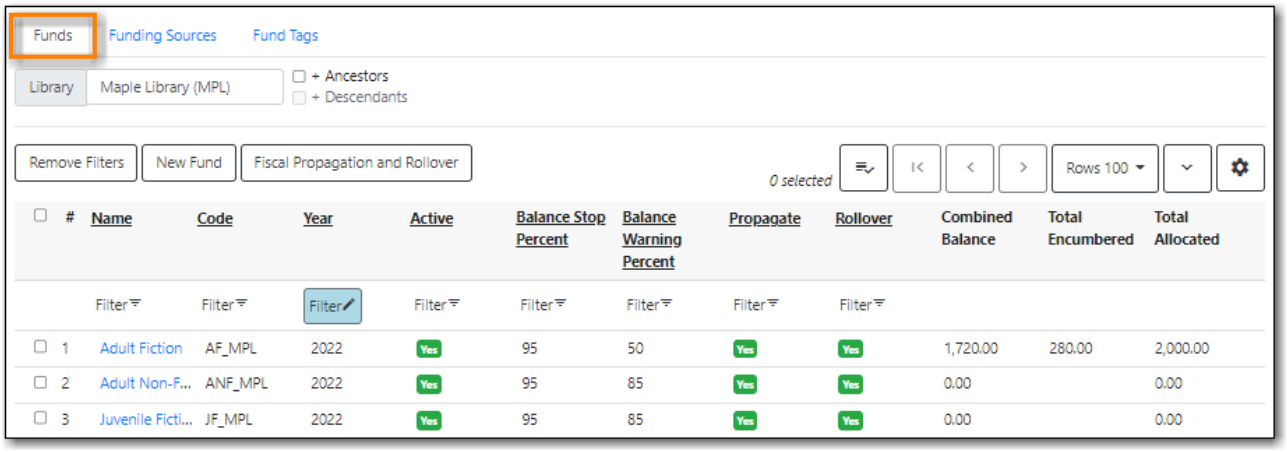


9. The money is transferred and the allocation balances of the funds are updated.

16.2.6. Track Balances and Expenditures

The Fund Details screen allows you to track a fund's balance, encumbrances, and amount spent.

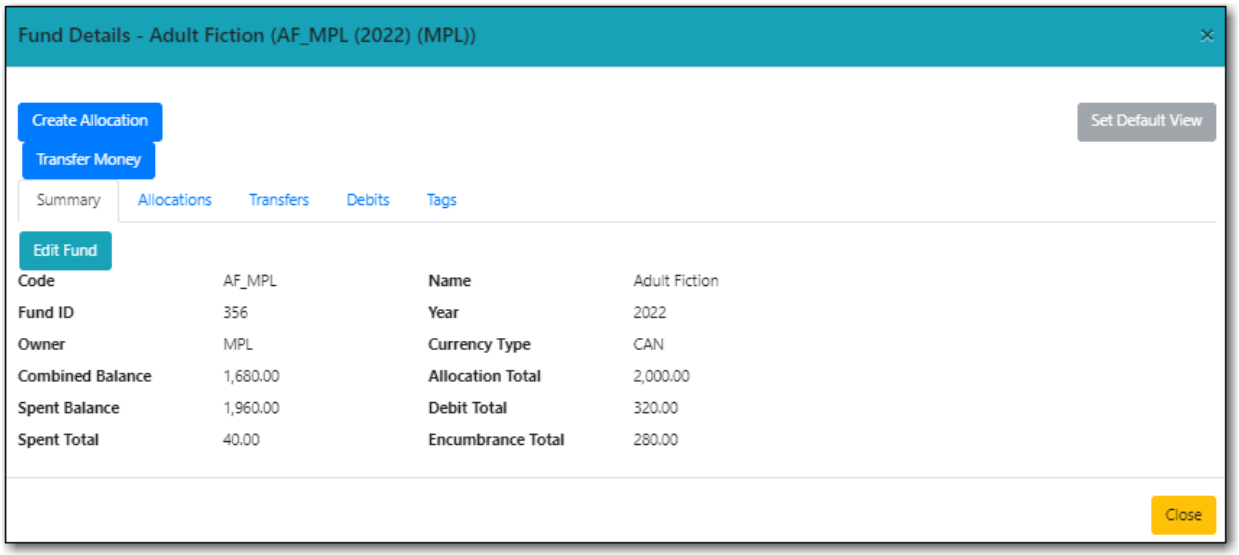
1. Select **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funds** tab.



3. Click the hyper linked name of the fund. The Fund Details screen will appear.
   - **Summary** - The summary tab allows you to track the following:
     - *Combined Balance* - The balance is calculated by subtracting both spent and encumbered funds from the total allocated to the fund.
     - *Spent Balance* - This balance is calculated by subtracting only the funds that been invoiced, and so spent, from the total allocated to the fund. It does not included encumbrances.
     - *Spent Total* - The total spent is calculated by adding the cost of all items that have been invoiced. It does not include encumbrances.
     - *Allocated Total* - This amount is the total monies allocated from the Funding Source(s).

- *Debit Total* - The total debits are calculated by adding together the total spent and total encumbered.
- *Encumbrance Total* - The total encumbered is calculated by adding all the encumbrances. It does not include items that have been invoiced.

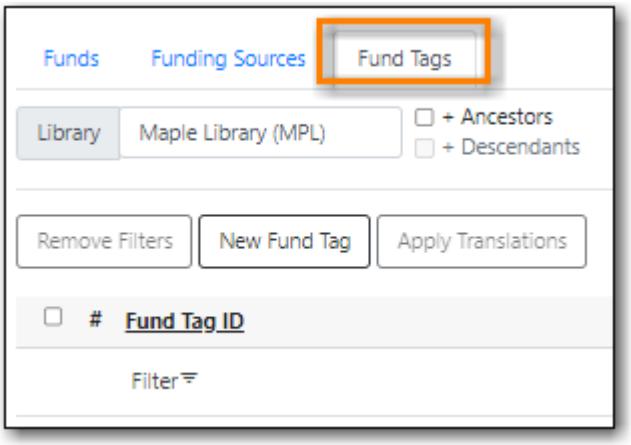
- **Allocations** - The Allocations tab allows you to track credit allocated from funding sources, transfers to other funds, and transfers from other funds.
- **Transfers** - The Transfers tab allows you to track money that is transfered between funds.
- **Debits** - The Debits tab allows you to track all purchases made and monies encumbered against the fund.
- **Tags** - The Tags tab allows you to add and delete fund tags. See Fund Tags.



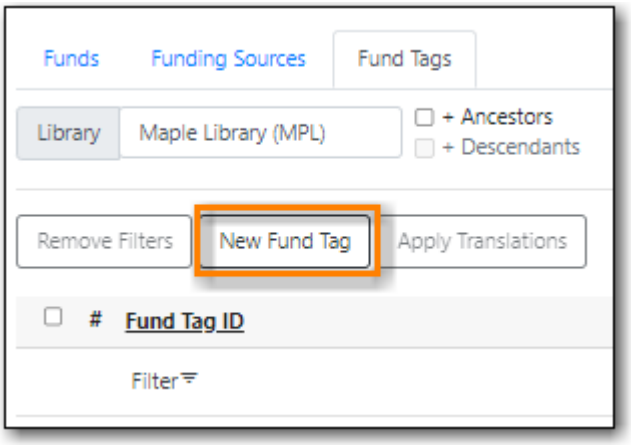
16.3. Fund Tags

16.3.1. Creating a Fund Tag

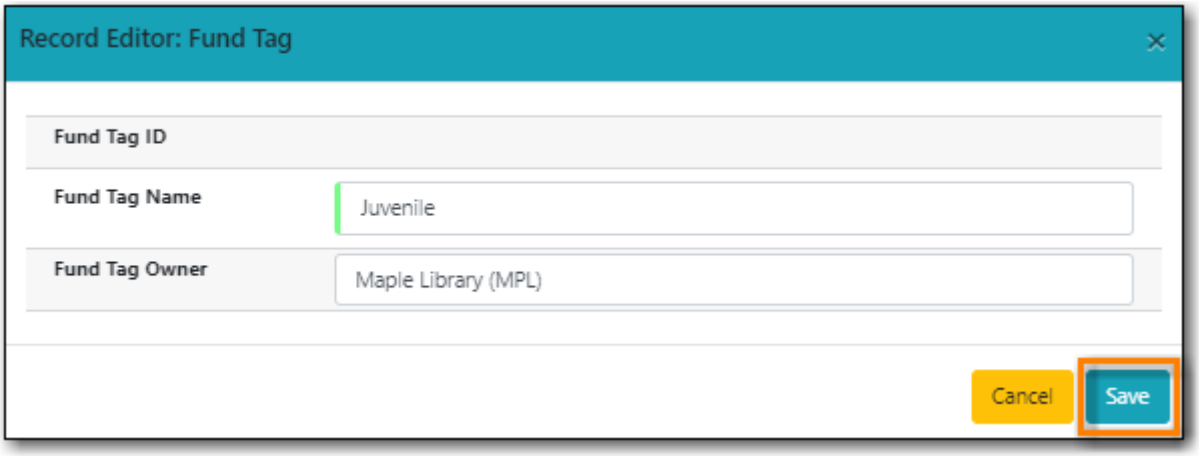
1. Select **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Fund Tags** tab.



3. Click **New Fund Tag**.



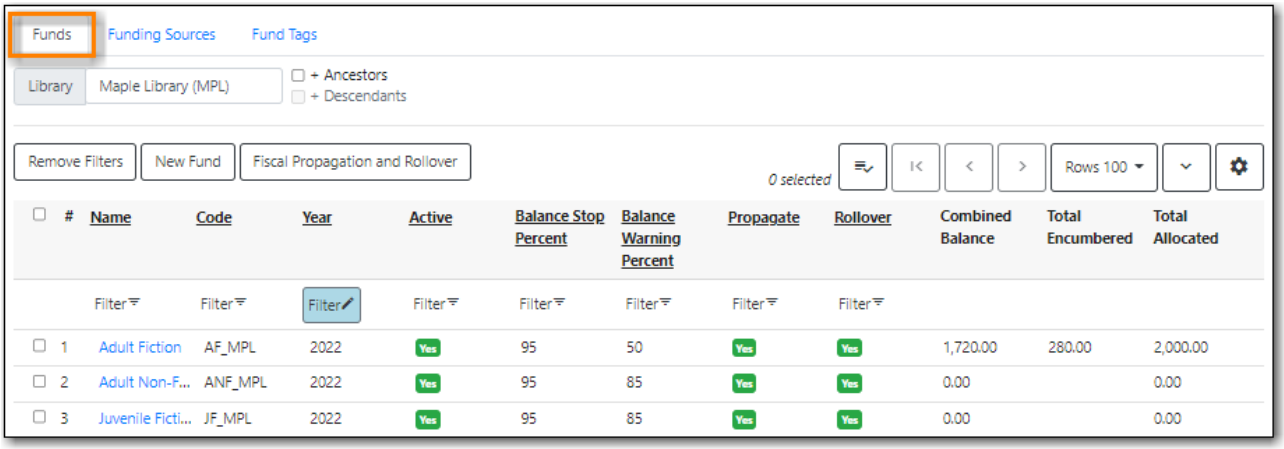
4. Enter a fund tag name.
5. Select the library or branch the fund tag will be used by as the Fund Tag Owner from the drop down menu.



6. Click **Save**
7. The fund tag is created.

16.3.2. Adding a Fund Tag to a Fund

1. Select **Administration** → **Acquisitions Administration** → **Fund Administration**.
2. Select the **Funds** tab.

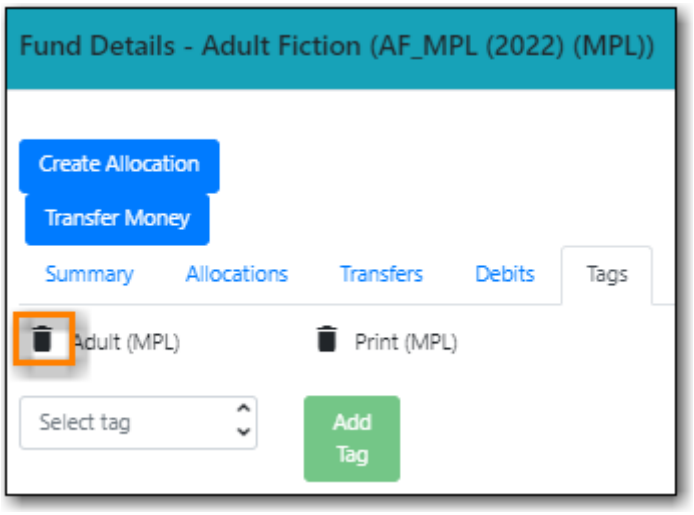


3. Click the hyperlinked name of fund you would like to add a tag to. The Fund Details screen will appear.
4. Click on the **Tags** tab.
5. Choose the tag from the drop down menu and click **Add Tag**.

6. The tag is added to the fund.

NOTE

Tags can be removed from funds by clicking the trash can icon beside the tag.



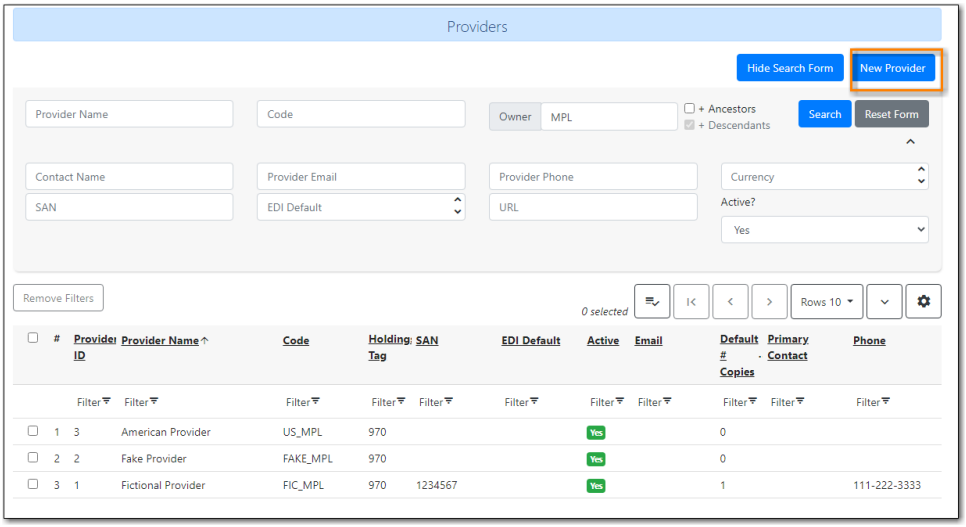
Chapter 17. Providers

Providers must be created in the acquisitions module before users can create purchase orders for providers.

Sitka's Evergreen Acquisitions Video - Providers Search (1:48)

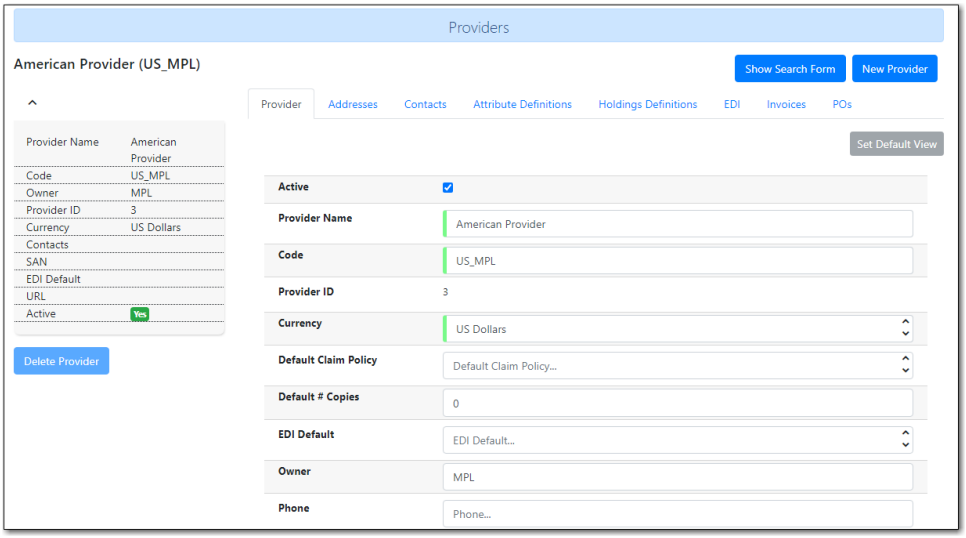
17.1. Create a Provider

1. Click **Acquisitions → Provider Search**
2. Click **New Provider**.



3. Enter the Provider Name.
4. Create a unique code for the provider.
    a. This code is used throughout the acquisitions module to identify the provider.
    b. We recommend that libraries add their library short code **ex. ULS_MPL**
5. Choose a currency from the drop down menu.
6. Select a default **Claim policy** from the drop down menu. (Optional)
    a. The default claim policy associated with each provider is automatically assigned to line items and copies purchased from the provider.
    b. Choose the policy that best describes the policy you use with the provider. The default policy does not need to cover all possible situations as it is possible to override with a different policy at the time of the claim.
7. Enter the default number of copies for the provider.
    a. When line items are added to purchase orders for this provider the default number of copies will be automatically created.

8. Do NOT select an EDI default from the drop down menu. Leave this field blank. EDI defaults must be created after the provider and then linked. Refer to Create an EDI Account for details.
9. Choose an owner from the drop down menu.
10. In the URL field, enter the web address for the provider's website.(Optional)
11. In the SAN field, enter the seven digit Standard Address Number for your provider.
    a. This field is required if EDI will be used with the provider.
12. If prepayment is required to purchase from this provider, check the box adjacent to Prepayment Required.
13. Click **Save**



14. After you save the provider profile, the screen reloads so that you can save additional information about the provider. You can also access this Provider Details screen by double clicking the provider name on the Providers screen. The tabs on the Provider Details screen allow you to add a provider address, provider contacts, attribute definitions, and holdings subfields. You can also view invoices and POs associated with the provider on the Provider Details screen.

A provider's address appears on printed purchase orders for that provider. Additional addresses can be added to the provider profile for providers with multiple offices.

Add an Address

1. Open the provider you would like to add an address to.
2. Go to the Addresses tab.
3. Click **New Provider Address**. A pop-up will appear.
4. Enter a name for the address in the Address Type field.
5. Fill in the address details. Required fields are:
    a. Street 1
    b. City
    c. State

d. Country
e. Post Code
f. Check the box adjacent to Is Valid?

6. Click **Save**.

The names of contacts and their specific contact details can be added to providers.

Add a Contact

1. Open the provider you would like to add a contact to.
2. Click the Provider Contacts tab.
3. Click **New Provider Contact**. A pop-up will appear.
4. Enter the name of the contact, the contact's role, email, and phone number in the respective fields.
5. Click **Save**.

Add an Address to a Contact

1. Addresses can be attached to specific contacts.
2. Open the Provider Contact tab.
3. Click New Contact Address further down the page. A pop-up will appear.
4. In the Type field, enter the type of address for your contact.
5. From the Contact drop down menu select the ID number of your contact.
6. Fill in the address details. Required fields are:
    a. Street 1
    b. City
    c. State
    d. Country
    e. Post Code
    f. Check the box adjacent to Is Valid?
7. Click **Save**.

17.2. Edit Provider

Provider information can be updated at any time.

1. Click **Acquisitions** → Provider Search.
2. If needed use the Filter to locate the desired provider.
3. Double Click the provider you would like to edit.
4. Make your changes.
5. Click **Save**.

17.3. Delete Provider

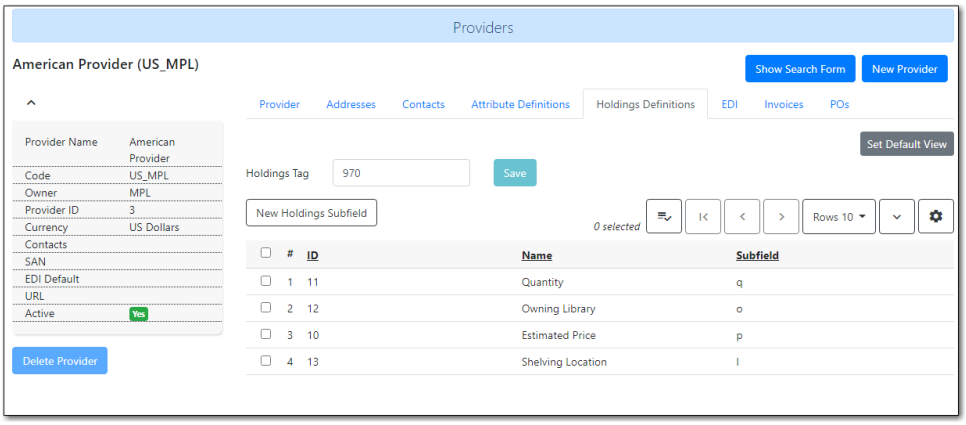
NOTE	You can only delete providers if no purchase orders have been assigned to them.

Before a provider can be deleted any additional addresses, contacts, attribute definitions, and holdings subfields must be deleted first. You are then able to delete the provider on the Provider List page by checking the box adjacent to the provider's name and clicking Delete Selected.

17.4. Holding Definitions

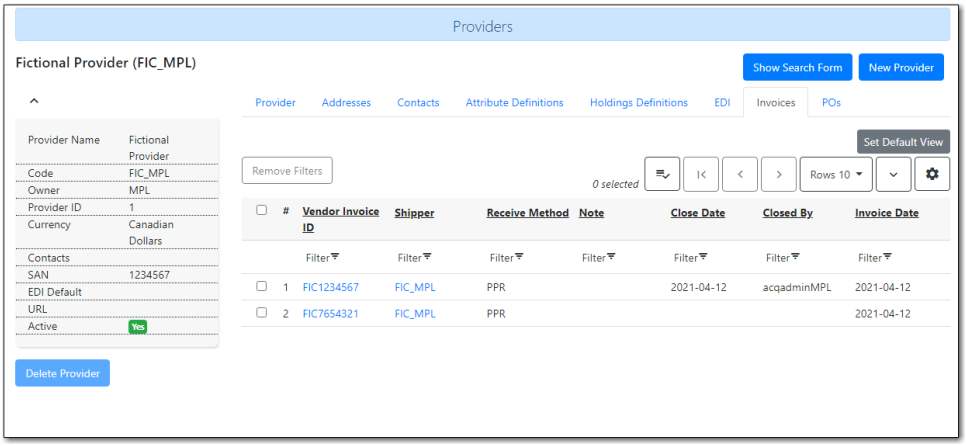
Holding subfields are used with a **970 Holdings Tag** to allow you to upload holdings information with your MARC file uploads.

1. Retrieve a provider.
2. Open the Holding Definitions tab.
3. Specify the Holdings Tag
4. Click **Save**
5. Click **New Holdings Subfield**. A pop-up will appear.
6. In the Name field, select the name for your holding subfield.
7. In the Subfield field, enter your subfield.
    a. The holdings subfields in use by Sitka are:
        i. b : Barcode
        ii. c : Call Number
        iii. m : Circulation Modifier
        iv. l : Shelving Location
        v. e : Estimated Price
        vi. f : Fund Code
        vii. n : Note
        viii. o : Owning Library
        ix. q : Quantity
    b. The subfields used will depend on your provider, but $o must always be used.
8. Repeat these steps to add all subfields included in your vendor records



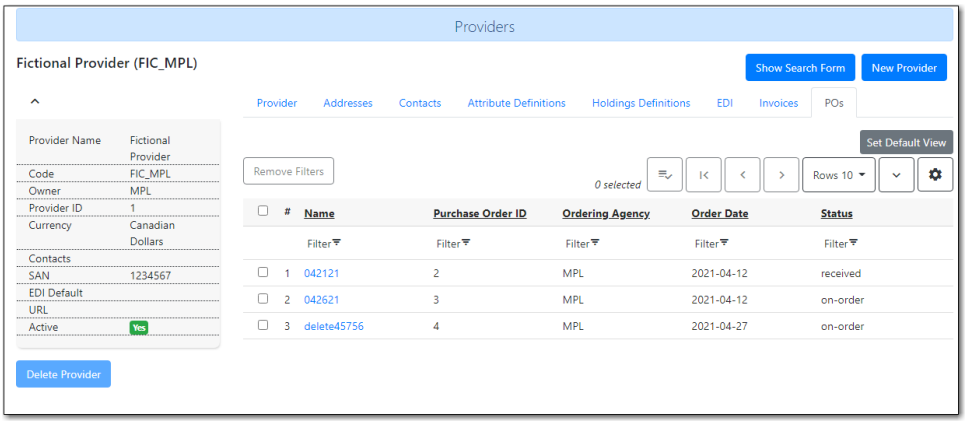
17.5. View a Provider's Invoices

1. Retrieve a provider.
2. Open the Invoices tab.
3. All invoices for the provider will display.
4. You can click on the hyperlinked name of an invoice to view it.



17.6. View Purchase Orders

1. Retrieve a provider.
2. Open the POs tab.
3. All purchase orders for the provider will display.
4. Click on the hyperlinked name of a purchase order to view it.


Providers
Fictional Provider (FIC_MPL)
Show Search Form
New Provider
Provider
Addresses
Contacts
Attribute Definitions
Holdings Definitions
EDI
Invoices
POs
Provider Name
Fictional Provider
Code
FIC_MPL
Owner
MPL
Provider ID
1
Currency
Canadian Dollars
Contacts
SAN
1234567
EDI Default
URL
Active
Yes
Delete Provider
Set Default View
Remove Filters
0 selected
Rows 10
Name Purchase Order ID Ordering Agency Order Date Status
Filter
1 042121 2 MPL 2021-04-12 received
2 042621 3 MPL 2021-04-12 on-order
3 delete45756 4 MPL 2021-04-27 on-order

Chapter 18. Acquisitions Settings in the Library Settings Editor

library settings)

Several settings in the Library Settings Editor pertain to functions in the Acquisitions Module.

You can access these settings by clicking **Administration → Local Administration → Library Settings Editor**. To update these settings a user must have both local system administrator and acquisitions administration permissions.

Table 1. Acquisitions Settings

Setting	Description	Data type	Edited by	Notes
Allow funds to be rolloed over without bringing the money along	This setting controls whether money and encumbrances or just encumbrances are rolled over when performing the Fiscal Year Close-out Operation.	True/false	LSA and Acq Admin	
Allows patrons to create automatic holds from purchase requests	This function is not currently available as further development of this feature is required.	True/False	Sitka Support	
Default circulation modifier	Enter the circulation modifier that you would be like to be applied to items that are created in the Acquisitions Module if no circulation modifier is specified.	Selection List	LSA and Acq Admin	

Setting	Description	Data type	Edited by	Notes
Default copy location	Select the copy location that you would like to be applied to items that are created in the Acquisitions Module if no copy location is specified.	Selection List	LSA and Acq Admin	
Fund Spending Limit for Block	When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will be blocked.	Number	LSA and Acq Admin	
Fund Spending Limit for Warning	When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will be blocked.		LSA and Acq Admin	
Initial status for received items	Allows staff to designate a custom copy status on received lineitems.	Selection List	LSA and Acq Admin	
Rollover Distribution Formulae Funds	When year end processes run the funds specified in distribution formulae roll over to the new fiscal year.	True/False	LSA and Acq Admin	

Setting	Description	Data type	Edited by	Notes
Set copy creator as receiver	When receiving a copy in acquisitions, set the copy "creator" to be the staff that received the copy	True/False	LSA and Acq Admin	
Temporary barcode prefix	The temporary barcode prefix must be entered as your library code preceded by the letter A. This prevents conflicts between the libraries using acquisitions.	Text	LSA and Acq Admin	
Temporary call number prefix	Enter a temporary call number prefix for items that are created in the Acquisitions Module.	Text	LSA and Acq Admin	
Delete bib if all copies are deleted via Acquisitions lineitem cancellation.	This means when a line item is cancelled, if there are no longer copies at any library attached to the bibliographic record, the bibliographic record will be deleted	True/False	Sitka Support	Default TRUE

Table 2. Acquisitions Settings - Load MARC Order Records Defaults

Setting	Description	Data type	Edited by	Notes
Upload Activate PO	Activate the purchase order by default during ACQ file upload	True/False	LSA and Acq Admin	
Upload Create PO	Create a purchase order by default during ACQ file upload	True/False	LSA and Acq Admin	

Setting	Description	Data type	Edited by	Notes
Upload Default Insufficient Quality Fall-Thru Profile	Default low-quality fall through profile used during ACQ file upload	Selection List	LSA and Acq Admin	Quality Fall-Thru Profiles are not currently set up in the system.
Upload Default Match Set	Default match set to use during ACQ file upload	Selection List	LSA and Acq Admin	
Upload Default Merge Profile	Default merge profile to use during ACQ file upload	Selection List	LSA and Acq Admin	
Upload Default Min. Quality Ratio	Default minimum quality ratio used during ACQ file upload	Number	LSA and Acq Admin	Minimum quality ratios are not currently set up in the system.
Upload Default Provider	Default provider to use during ACQ file upload	Text	LSA and Acq Admin	
Upload Import Non Matching by Default	Import non-matching records by default during ACQ file upload	True/False	LSA and Acq Admin	
Upload Load Items for Imported Records by Default	Load items for imported records by default during ACQ file upload	True/False	LSA and Acq Admin	
Upload Merge on Best Match by Default	Merge records on best match by default during ACQ file upload	True/False	LSA and Acq Admin	
Upload Merge on Exact Match by Default	Merge records on exact match by default during ACQ file upload	True/False	LSA and Acq Admin	
Upload Merge on Single Match by Default	Merge records on single match by default during ACQ file upload	True/False	LSA and Acq Admin	

Chapter 19. Permissions

19.1. Acquisitions Permission Groups

There are four Acquisitions Permission Groups: Basic Selector, Advanced Selector, Purchaser, Administrator. These permission groups are applied in addition to a staff member's current permissions group.

Basic Selector

- Use the Acquisitions General Search
- Create, merge, clone, and delete selection lists
- Add line items to a selection list
- View and use selection lists created by another user
- Create brief MARC records
- Perform a MARC Federated Search
- Add copies, alerts, and notes to line items
- Apply funds to copies and line items on a selection list
- Link line items to bibliographic records in the catalogue
- Mark line items selector-ready and/or order-ready
- View, but not create, purchase orders
- View fund summaries for the current year for the location the workstation is registered to

Advanced Selector

- Basic Selector permissions
- View fund summaries for multiple years and location
- Create, edit, delete funds
- View debits associated with a fund
- Transfer money between funds

Purchaser

- Advanced Selector permissions
- Apply distribution formulas to line items
- Create, view, rename, print, and activate purchase orders
- Add notes and charges to purchase orders
- Receive and un-receive purchase orders, line items, and copies
- View purchase order history
- Cancel purchase orders, line items, and copies

- Change a line item's claim policy
- Claim line items and copies
- Print claim vouchers
- Create, view, print, and close invoices
- Reopen invoices
- Add charges to invoices
- Prorate charges across the funds on an invoice
- View, but not edit, providers
- View all invoices associated with a particular provider

Administrator

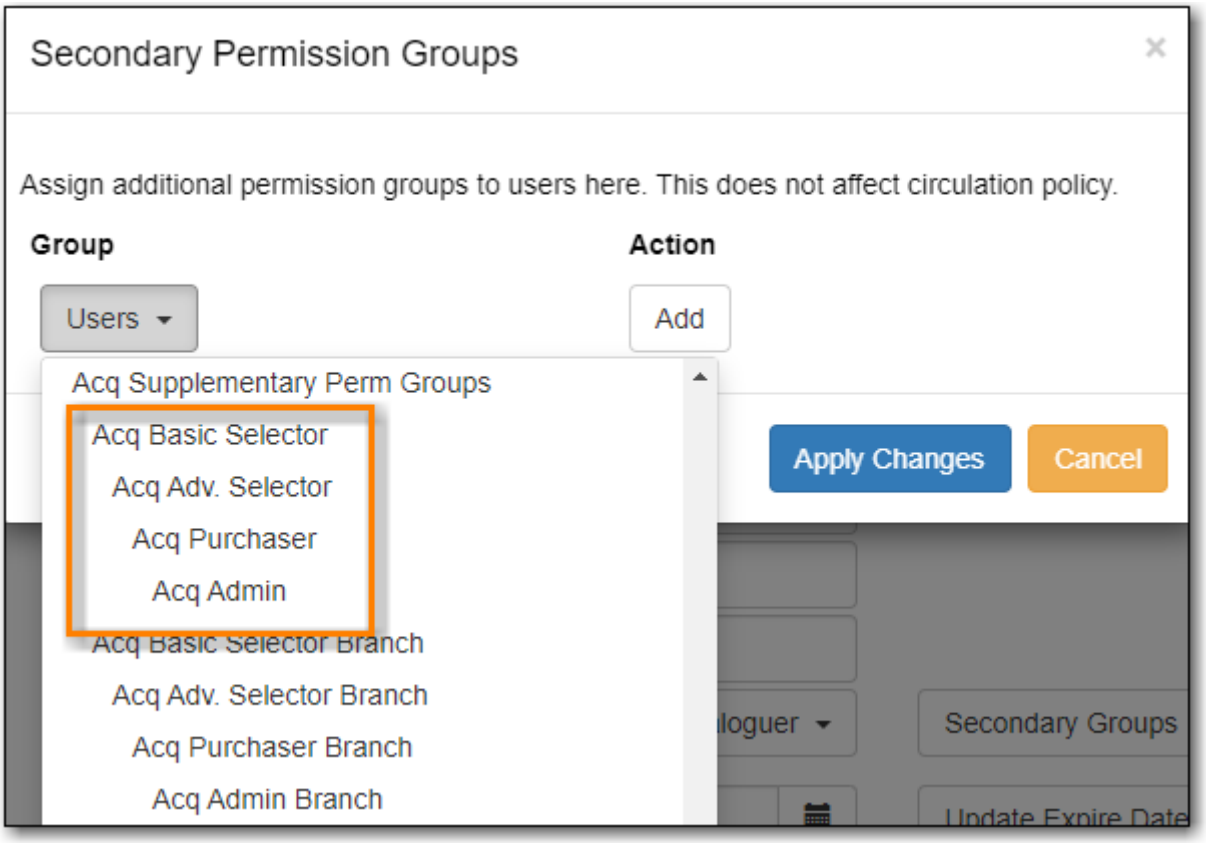
- Selector and purchaser permissions
- Create, edit, and delete funding sources
- Allocate credit to funding sources
- Create, edit, and delete funds
- Allocate credit from funding sources to funds
- Create, edit, and delete providers
- Update a variety of Library Editor Settings
- Create distribution formulas
- Create line item alerts
- Assign acquisitions permission groups to other staff members

19.2. Granting Acquisitions Permissions

Users with the Acquisitions Administrator permissions can grant the Basic Selector, Advanced Selector or Purchaser permission to other users. The Administrator permissions can only be granted by Sitka Staff.

Grant Acquisitions Permissions

1. Open the account of the user you wish to grant acquisitions permissions to.
2. Click **Edit**.
3. Click **Secondary Groups**
4. From the drop down menu select one of the Acq Supplementary Perm Groups (Basic Selector, Advanced Selector or Purchaser).



5. Click **Add**.
6. Click **Save** in the pop-up.
7. Click **Save** in the patron account.

Remove Acquisitions Permissions

1. Open the account of the user you wish to remove acquisitions permissions from.
2. Click **Edit**.
3. Click **Secondary Groups**
4. Click **Delete** beside the permission group you would like to remove.
5. Click **Save** in the pop-up.
6. Click **Save** in the patron account.

NOTE	Acquisitions permissions groups only function as secondary groups. If an acquisitions permission group is set as a user's Main (Profile) Permission Group, that user will be unable to login to Evergreen.

Chapter 20. Acquisitions Year End

Adapted with permission from original material by the Evergreen Community

Sitka Training Video - Acquisitions Fiscal Year Close-out (Year End) (6:20)

Sitka Training Video - Acquisitions Fiscal Year Start (New Year) (5:42)

At the end of each fiscal year libraries need to run year end processes to close out the year.

20.1. Year End Checklist

Libraries should review this checklist as they reach the end of their fiscal year in preparation for the year end processes.

- Resolve all pending purchase orders.
  - Search for pending purchase orders. Activate purchase orders for item you still wish to order. Delete duplicate purchase order or purchase order you don't want to activate.
- Run report **Lines Items That Have Been Invoiced but not Received**.
  - Template found in Sitka_templates → Acquisitions → Line Items
- Mark as received all items physically received in the current fiscal year.
  - See Receive Line items.
- Invoice all items to be paid for in the current fiscal year.
  - See Invoices
- Save and Close all open invoices.
  - See Invoices Search.
- Run report **Lines Items That Have Been Received but not Invoiced**.
  - Template found in Sitka_templates → Acquisitions → Line Items
- Verify the Funding Sources do not have a negative balance.
  - See Funding Sources
- Choose a date to run the year end process.
  - Libraries should **NOT** run year end between 9:30am and 11:00am PT as EDI invoices are retrieved by the system system during this period every morning.
- Implement an acquisitions year end freeze.
  - New orders should not be created while you are preparing for Year End.

20.2. Sitka's Acquisitions Year End Procedure

NOTE	If you run into difficulties at any point in this process please contact Support for assistance.

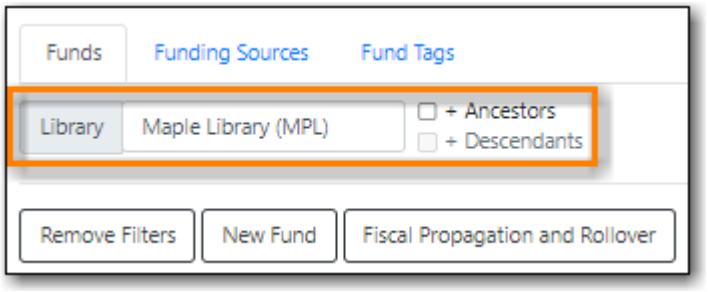
1. Prepare for year end using the Year End Checklist.
    a. See Year End Checklist
2. Implement an acquisitions year end freeze.
    a. An acquisitions freeze helps ensure that all debits and encumbrances are assigned to the correct fiscal year.
3. Run report **Fund Report by Year** for old fiscal year.
    a. Template found in Sitka_templates → Acquisitions → Funds
4. Complete a Dry Run to check that all necessary funds will be propagated for the new fiscal year.
    a. See Dry Run
5. Perform the Fiscal Year Close-out Operation.
    a. See Fiscal Year Close-out Operations
6. Run report **Fund Report by Year** for old and new fiscal year.
    a. Template found in Sitka_templates → Acquisitions → Funds
7. Use the fund reports to confirm that the encumbrances and spent totals for the funds in the old and new fiscal years are correct.
    a. Libraries should see zero encumbrances in their old fiscal year and negative balances in their new fiscal year.
8. Create new funding source(s) and allocates credit to the funding source(s).
    a. See Creating Funding Sources and Applying Credit.
9. Allocate money from the new funding source(s) into the new funds.
    a. See Allocate Credit to Funds - Funding Source Tab
10. Lift acquisitions year end freeze.
    a. New orders can be created.

20.3. Fund Propagation and Rollover

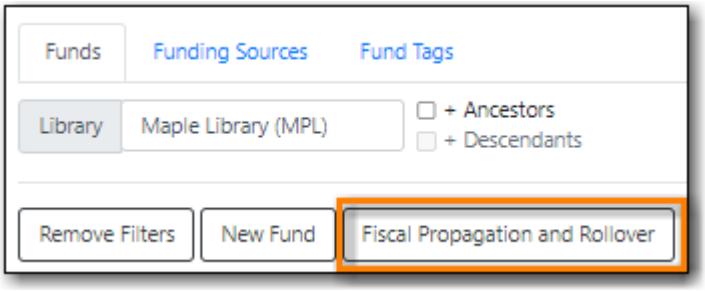
Before running the Fiscal Year Close-out Operation, a Dry Run can be performed to ensure that Close-out runs as expected.

20.3.1. Dry Run

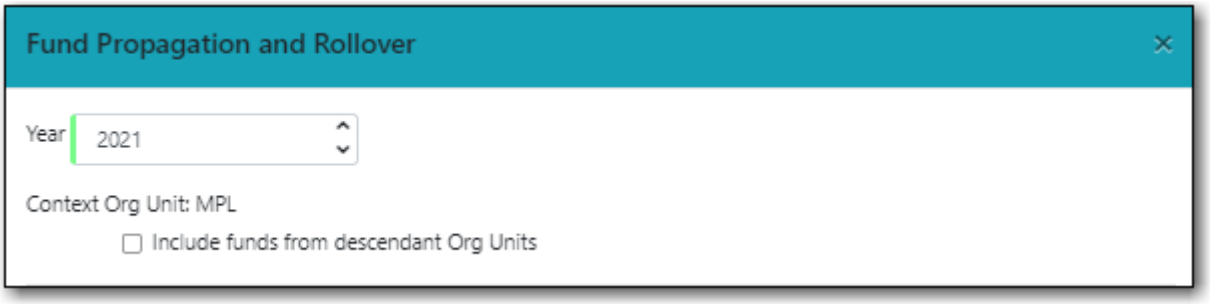
1. On the Funds tab, select the top level of your organization in the library selector.



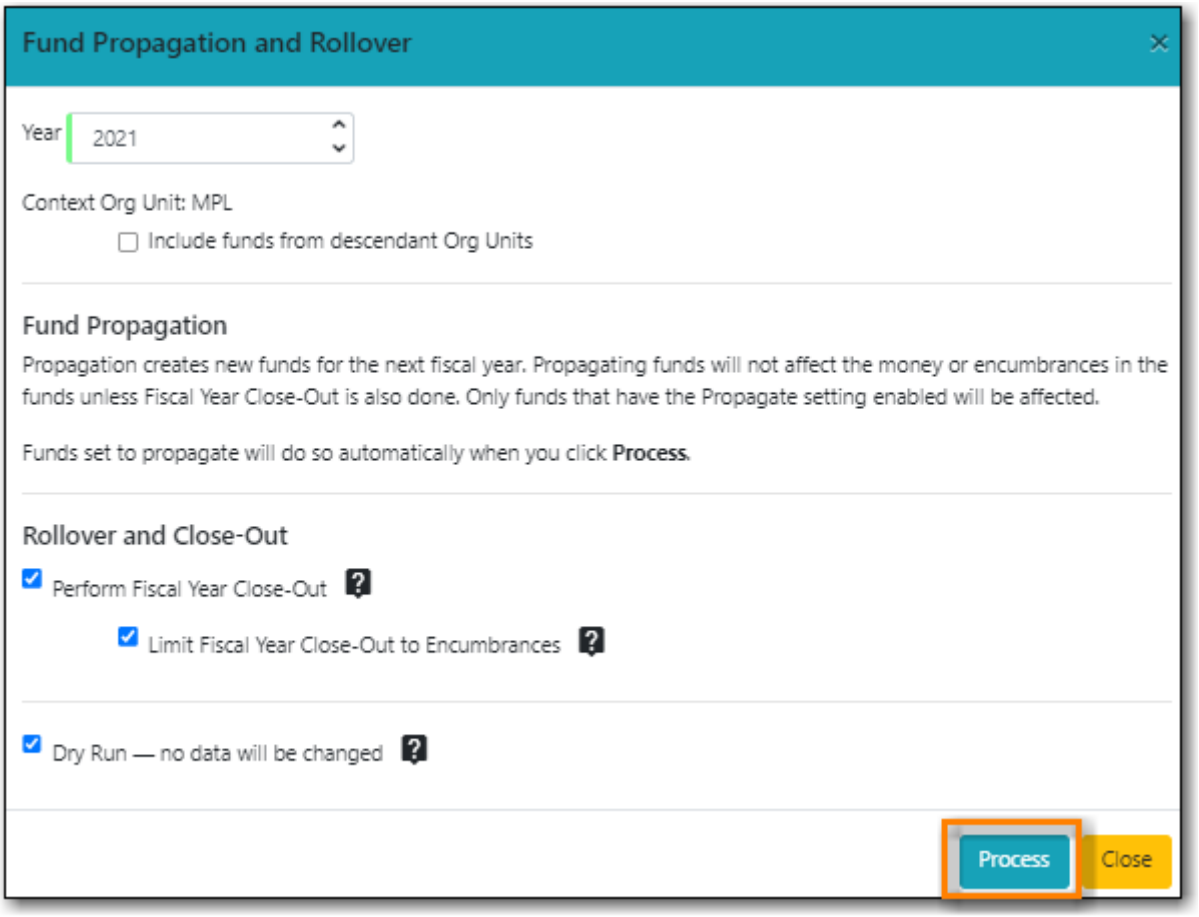
2. Click the **Fiscal Propagation and Rollover** button.



3. From the **Year** drop down, choose the year for which you would like to perform the Fiscal Year Close-out Operation.
4. Multi-branch systems should check the box for **Include funds for descendant Org Units**.



5. Check the boxes applicable to your requirements for the close-out.
   a. See Fiscal Year Close-out Operations
6. The box for **Dry Run** is checked by default.
7. Click **Process**.



8. Evergreen will temporarily create the new funds and give details about what changes would be made.

NOTE No changes are actually made to the system when doing a Dry Run.

20.3.2. Fiscal Year Close-out Operations

The Year End Close-out Operation allows you to deactivate funds for the current year and create analogous funds for the next year. It transfers encumbrances to the analogous funds.

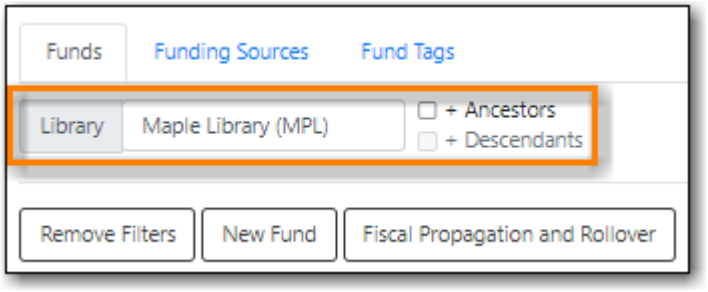
Choose **ONE** of the following options for Fiscal Year Close-out

1. Propagation Only - Create analogous funds for the next year.
2. Rollover Encumbrances Only - Create analogous funds for the next year and rollover

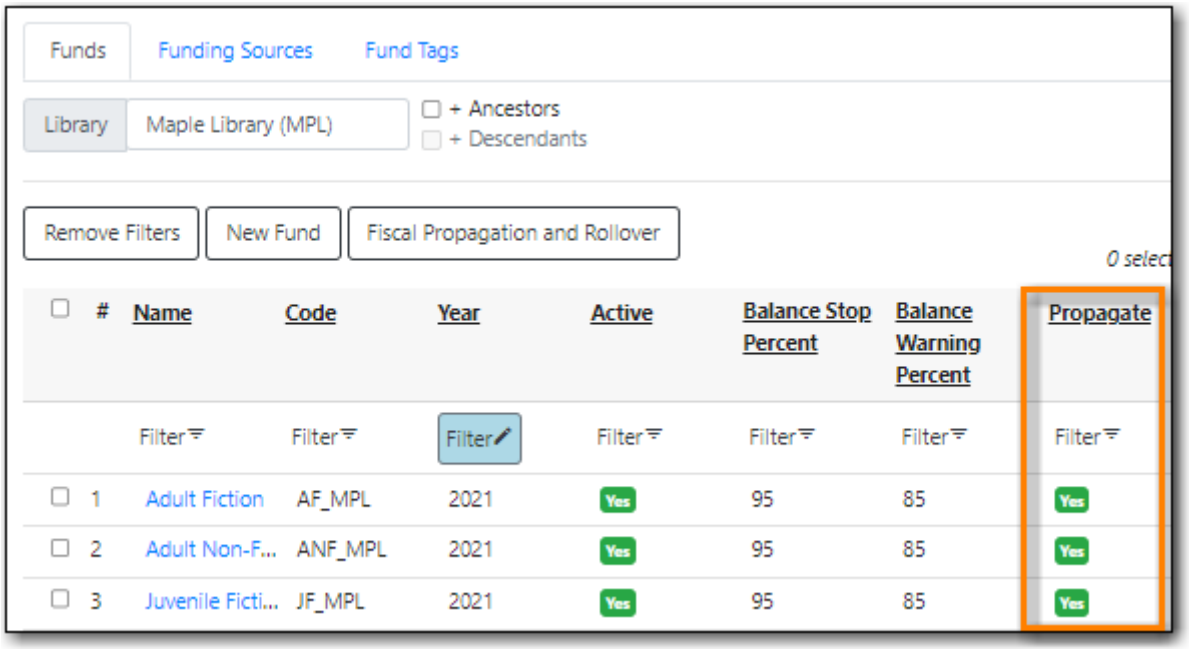
encumbrances.

Propagation Only

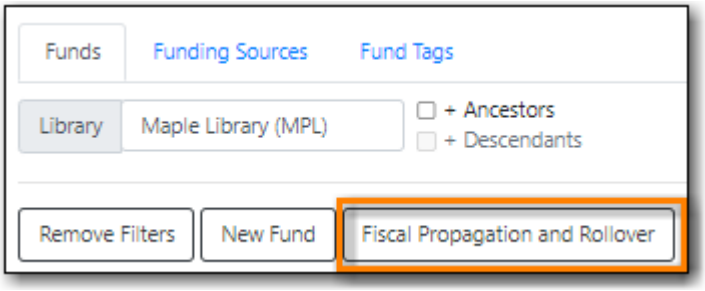
1. On the Funds tab, select the top level of your organization in the library selector.



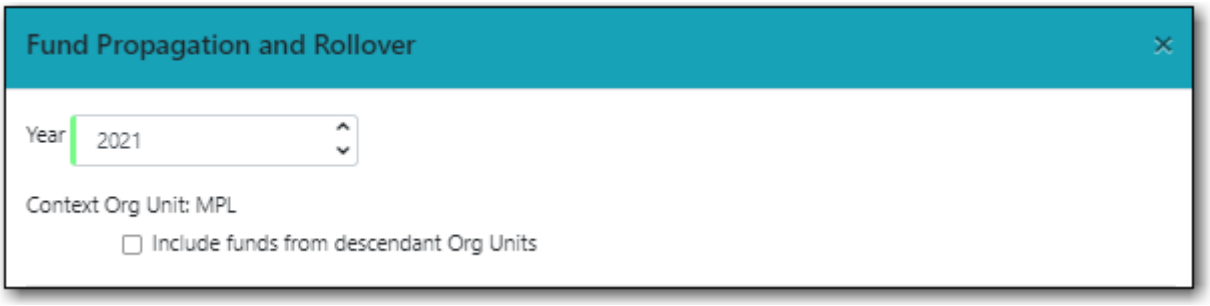
2. **Propagate** must be set to YES for every fund that will be propagated.
   a. See Creating Funds for information on these check boxes.



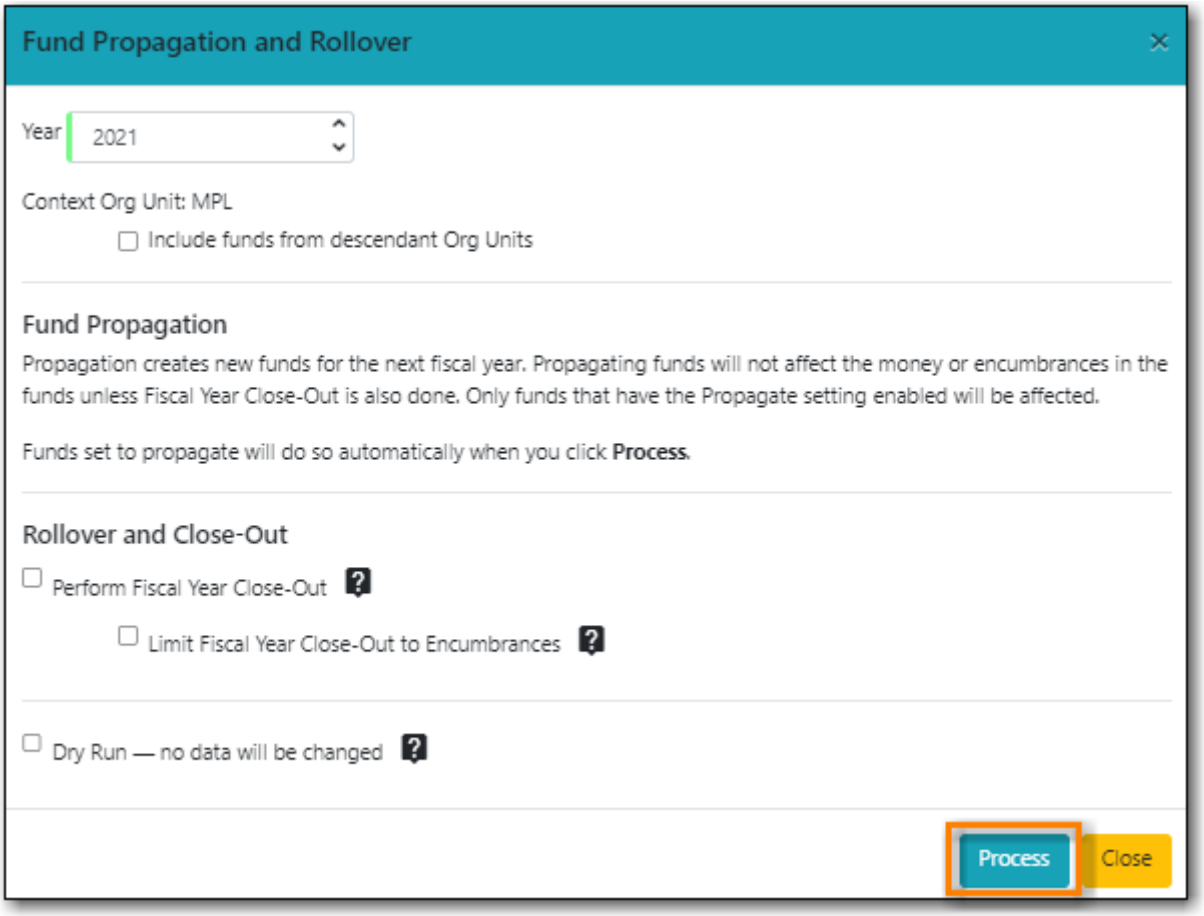
3. Click the **Fiscal Propagation and Rollover** button.



4. From the **Year** drop down, choose the year for which you would like to perform the Fiscal Year Close-out Operation.
5. Multi-branch systems should check the box for **Include funds for descendant Org Units**.



6. Click **Process**.

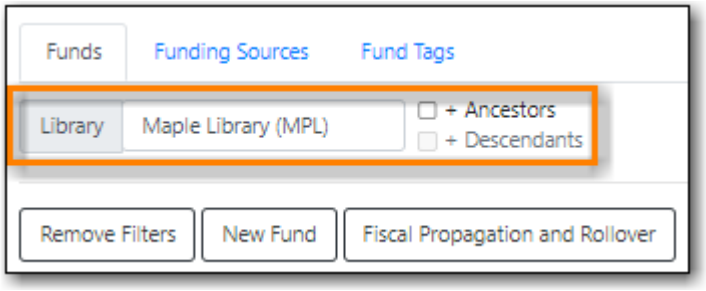


7. Evergreen will create new funds, increasing the year by one, for all the funds in the year you selected that have **Propagate** set to YES; no money or encumbrances are moved. Evergreen will display a summary of the changes.

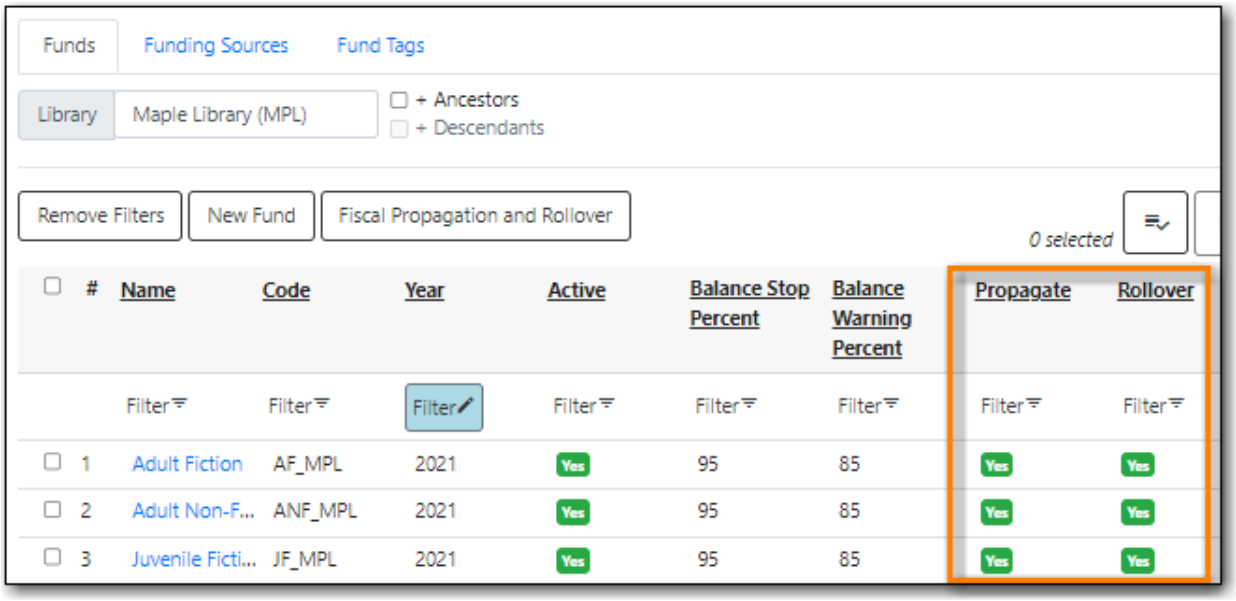
8. Click **Close** to return to the Funds tab.

Rollover Encumbrances Only

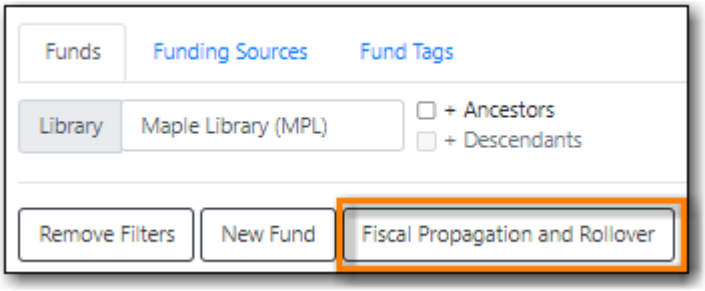
1. On the Funds tab, select the top level of your organization in the library selector.



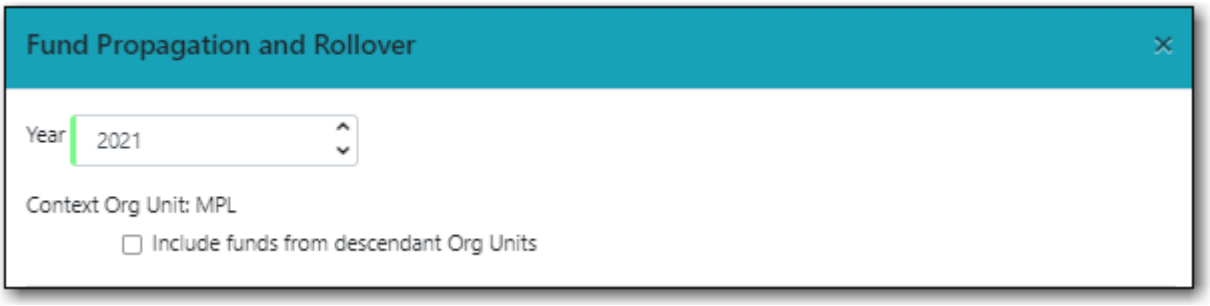
2. **Propagate** must be set to YES for every fund that will be propagated.
3. **Rollover** must be set to YES for every fund where the encumbrances should be rolled over.
   a. See Creating Funds for information on these check boxes.



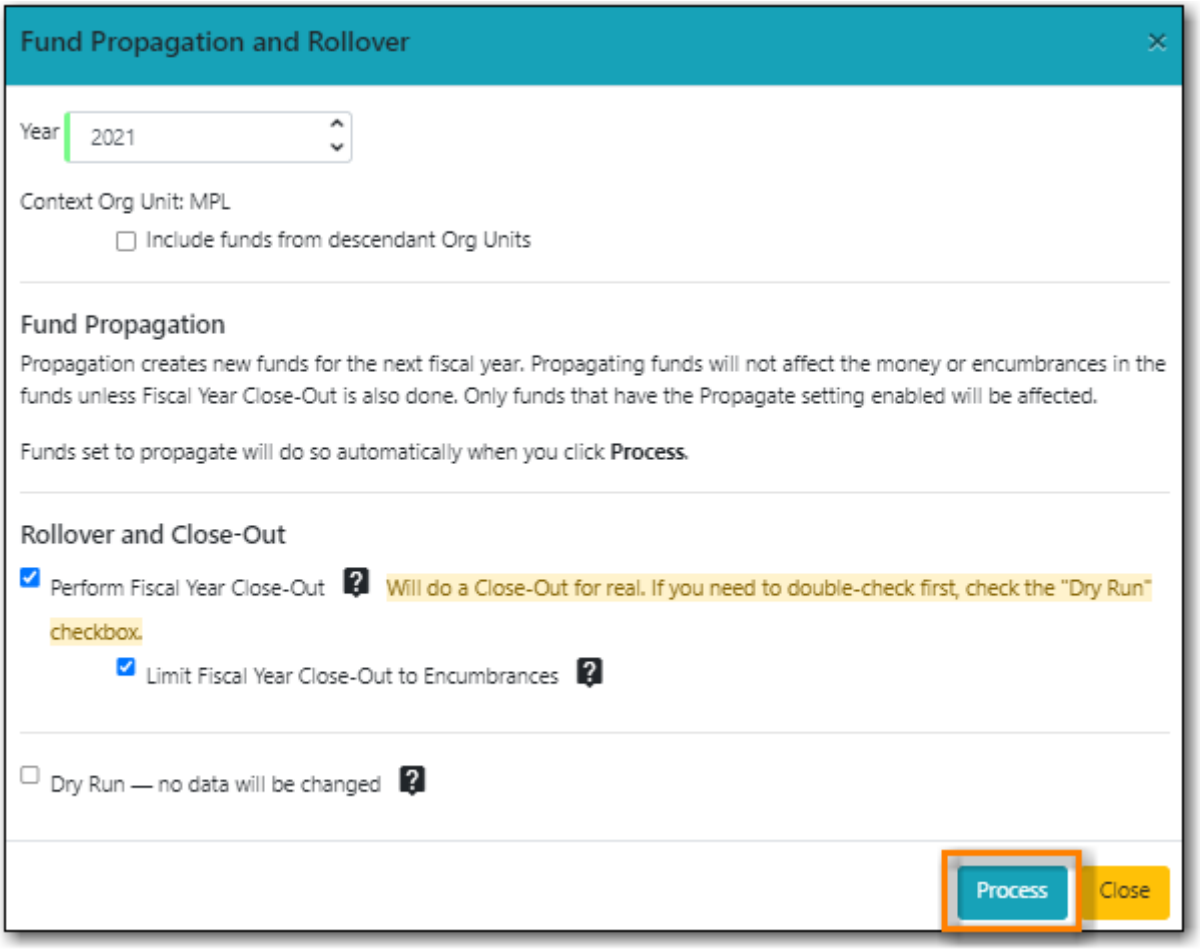
4. Click the **Fiscal Propagation and Rollover** button.



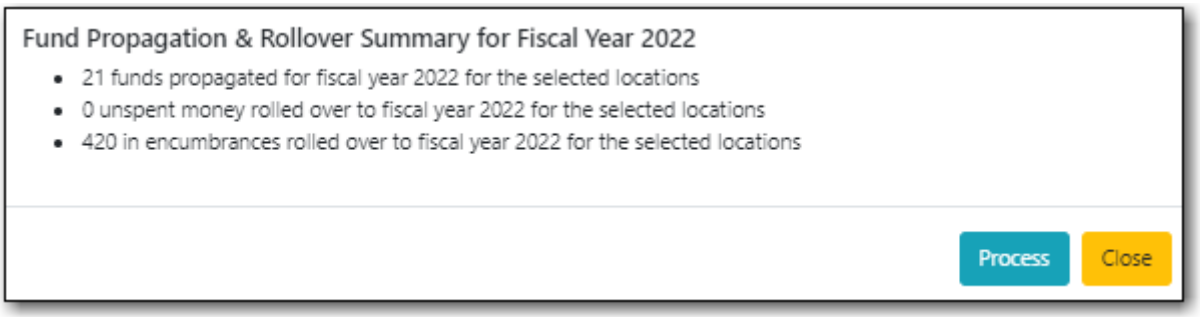
5. From the **Year** drop down, choose the year for which you would like to perform the Fiscal Year Close-out Operation.
6. Multi-branch systems should check the box for **Include funds for descendant Org Units**.



7. Click **Process**.



8. Evergreen will create new funds, increasing the year by one, for all the funds in the year you selected that have **Propagate** set to YES. Encumbrances will be moved to the new funds for every fund where the **Rollover** box was checked. The old funds will be de-activated. Evergreen will display a summary of the changes.



9. Click **Close** to return to the Funds tab.

Chapter 21. Optional Administrative Set-up

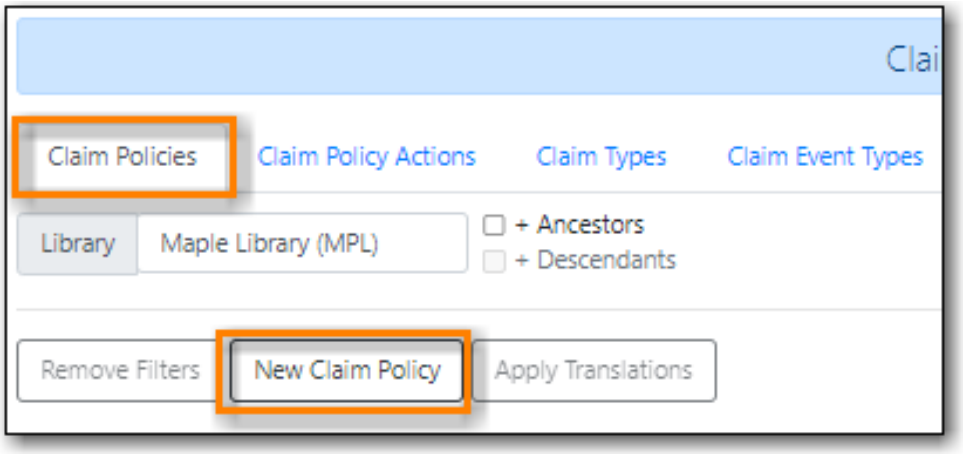
21.1. Claiming

21.1.1. Claim Policies

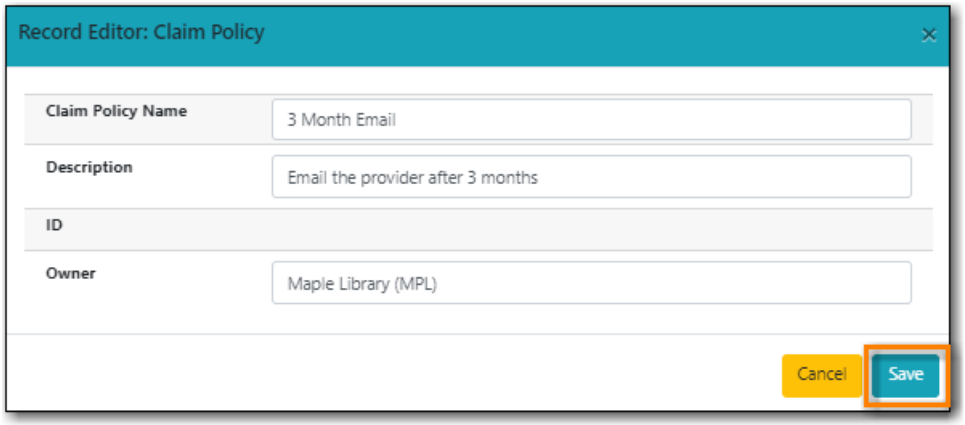
Evergreen uses claim policies to compile a list of claim-ready items based on order date so that library staff can follow up with providers about items that haven't arrived as expected.

Creating a Claim policy

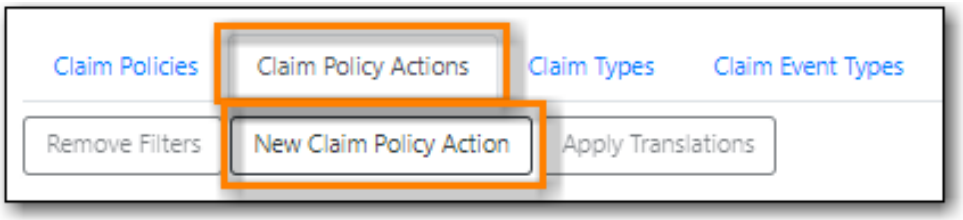
1. Click **Administration** → **Acquisitions Administration** → **Claiming**
2. On the **Claim Policies** tab click **New Claim Policy**.



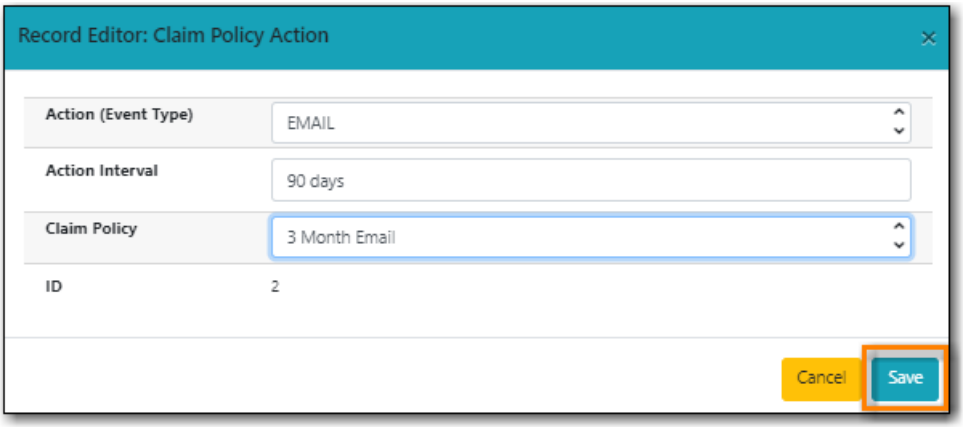
3. Enter a name, description, and owner for the policy and click **Save**.



4. On the **Claim Event Types** tab you can create additional event types if needed. Phone, Email, and Fax are currently set at the Sitka level.
5. On the **Claim Policy Actions** tab click **New Claim Policy Action**.



6. Select the claim policy name from the drop down.
7. Select the action to attach to this policy.
8. Enter the action interval to apply to this policy.
9. Click **Save**



NOTE

A default claim policy can be associated with a provider and is then automatically assigned to line items and copies purchased from that provider.

See Providers for the steps to add a default claim policy.

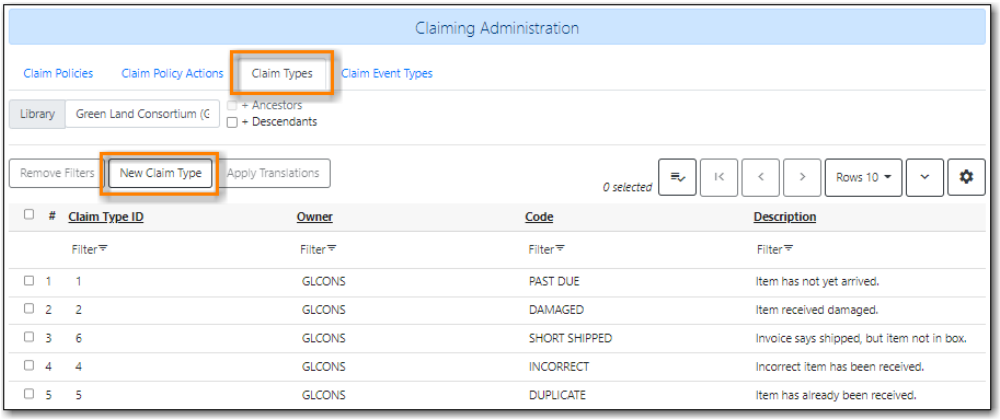
21.1.2. Claim Types

Claim types are used in the claiming process to indicate why an item needs to be claimed.

The following claim types have been set up for the consortium:

- PAST DUE - Item has not yet arrived.
- DAMAGED - Item received damaged.
- SHORT SHIPPED - Invoice says shipped, but item not in box.
- INCORRECT - Incorrect item has been received.
- DUPLICATE - Item has already been received.

Library staff can create additional claim types by clicking **New Claim Types** on the **Claim Types** tab.



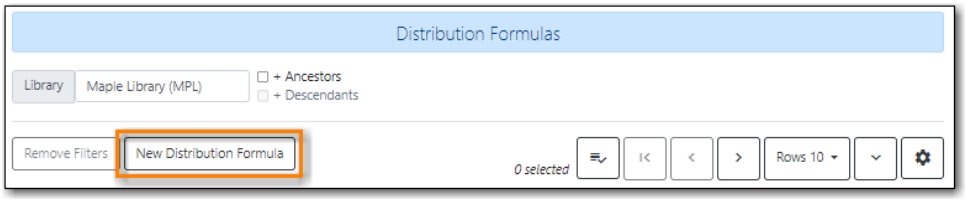
21.2. Distribution Formulas

Distribution formulas are intented for use in multi-branch systems to specify the number of copies that should be distributed to specific branches.

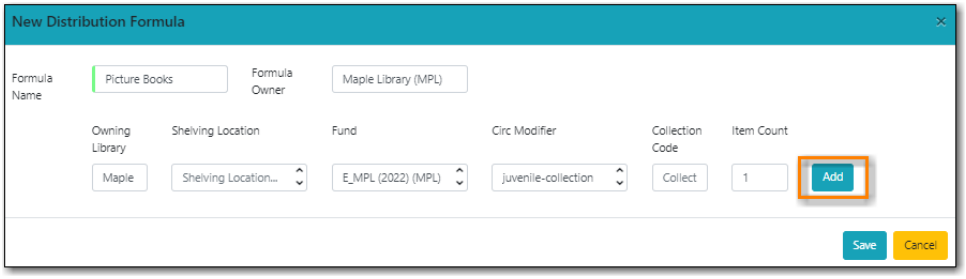
The formulas are also used for all libraries as line item templates with the batch updater on purchase orders. Formulas can be created and reused as needed.

21.2.1. Creating a Distribution Formula

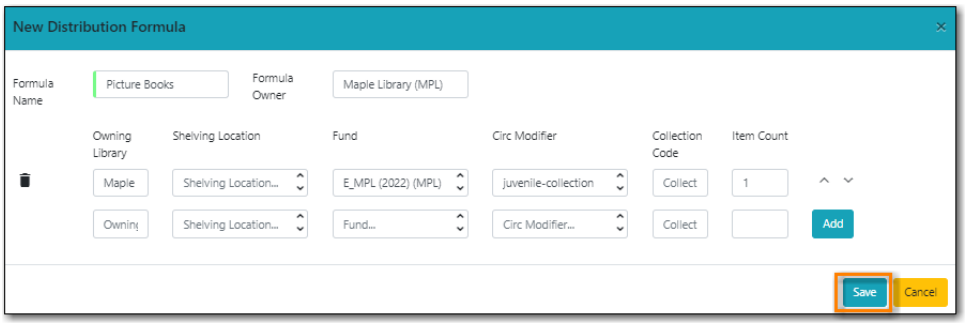
1. Click **Administration** → **Acquisitions Administration** → **Distribution Formulas**
2. Click **New Distribution Formula**.



3. Enter a formula name. There is no limit to the number of characters that can be entered in this field.
4. Choose a formula owner. The formula owner indicates the organizational units whose staff can use this formula.
5. Create your distribution formula/line item template using a combination of the following fields:
   - **Owning Library**
   - **Shelving Location**
   - **Fund**
   - **Circ Modifier**
   - **Collection Code**
6. In the **Item Count** field, enter the number of copies that should be added to the branch.
7. Click **Add**.

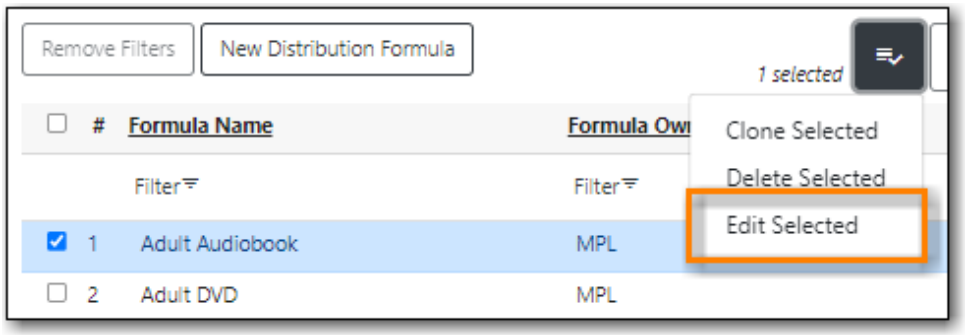


8. Multi-branch libraries can add lines for as many branches as you require.
9. Click **Save**.

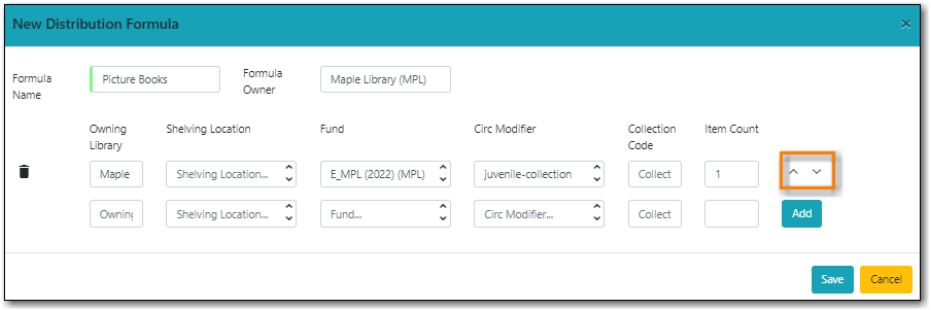


21.2.2. Editing a Distribution Formula

1. Select **Administration** → **Acquisitions Administration** → **Distribution Formulas**.
2. Select the formula you want to edit and from the **Actions** menu choose **Edit Selected**.



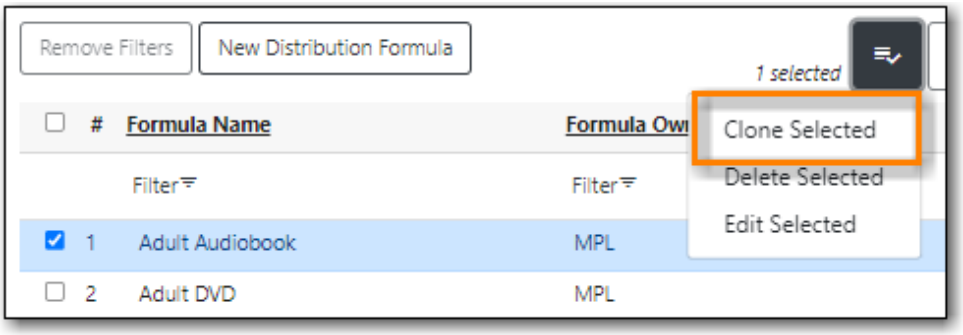
3. On the pop up you can add a new entry, edit an existing entry, or delete an existing entry using the trash can icon.
4. Use the arrows to re-order the entries.
    a. When using a distribution formula the system will start at the top of the list and work down the list until it runs out of items. For example, if you are ordering five copies of a title and you apply a distribution formula with entries for seven branches (1 item each), only the first five branches will receive items.



5. Click **Save** after you've made your changes.

21.2.3. Cloning a Distribution Formula

1. Select **Administration** → **Acquisitions Administration** → **Distribution Formulas**.
2. Select the formula you want to edit and from the **Actions** menu choose **Edit Selected**.



3. Make the necessary changes to your cloned formula, including updating the name, and click **Save**.

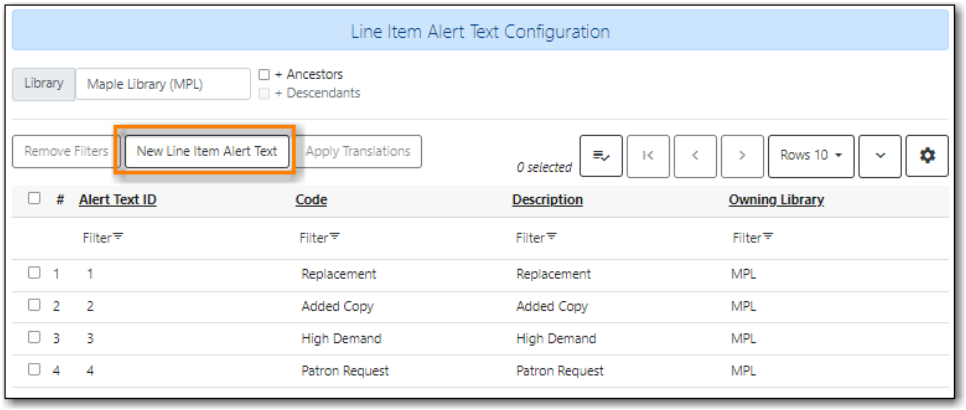
21.3. Line Item Alerts

Line item alerts are predefined text that can be added to line items on selection lists or purchase orders. Alerts can assist staff in the processing and cataloguing of items by alerting staff to the correct collection for the item or directing the item to a particular department. You can define the alerts from which the staff can choose.

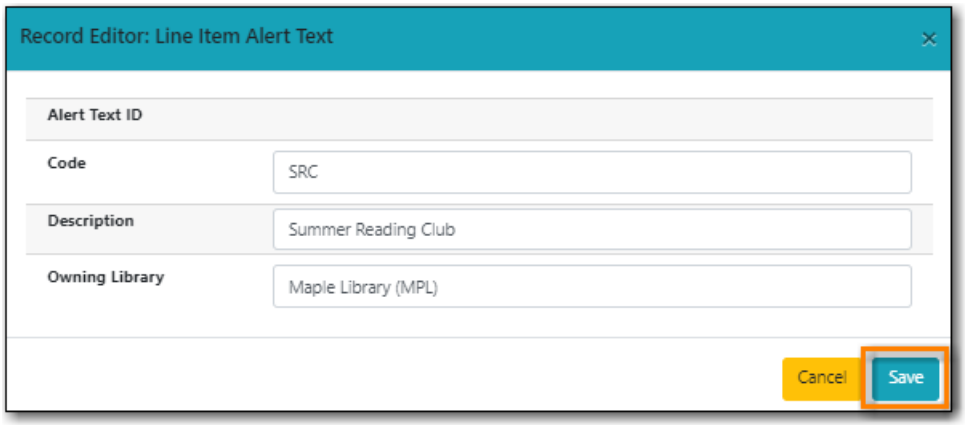
Line item alerts in appear in a pop up box when the line item, or any of its copies, are marked as received.

21.3.1. Create a Line Item Alert

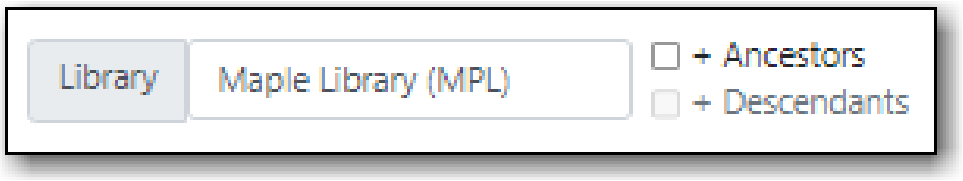
1. Click **Administration** → **Acquisitions Administration** → **Line Item Alerts**
2. Click New Line Item Alert Text.



3. Create a code for your alert. There is no limit to the number of characters that can be entered in this field.
4. Create a description of your alert. There is no limit to the number of characters that can be entered in this field.
5. Select an owning library from the drop down menu. The owning library indicates the organizational unit(s) whose staff can use this alert.
6. Click **Save**.



7. To view your alerts make sure the library selector is set to your library. Multi-branch libraries may want to set this at the system level and check the box for Descendants.



21.4. Electronic Data Interchange (EDI)

Electronic Data Interchange (EDI) accounts are used to electronically send purchase orders and receive invoices from providers.

EDI is set up for the following providers:

- CVS
- United Library Services ULS
- Whitehots

21.4.1. Standard Address Number (SAN)

A Standard Address Number (SAN) is a unique 7 digit number that identifies a library or a provider. Please contact Co-op Support if your library does not already have a SAN.

For EDI to work your library must have a SAN and each of your providers must supply you with their SAN.

Library SAN

Your Library SAN is stored in your Org Unit settings.

Enter a Library's SAN

1. In Evergreen select **Administration → Server Administration → Organizational Units**.
2. Find your library from the tree on the left side of the page and click on it to open the settings.
3. Multi-branch library systems will see an entry for each branch but should select their system rather than a specific branch.
4. Click on the Address tab.
5. Click on the Mailing Address tab.
6. Enter your library's SAN in the field labeled SAN.
7. Click **Save**.

NOTE	These steps only need to be done once per library.

Provider SAN

Enter a Provider's SAN

1. In Evergreen select **Administration → Acquisitions Administration → Providers**.
2. Double click on the line for the provider you would like to edit.
3. Enter your provider's SAN in the field labeled SAN.
4. Click **Save**.

NOTE	These steps need to be repeated for every provider with which EDI is used.

21.4.2. Create an EDI Account

TIP You must create your provider before you create an EDI account for the provider.

Contact your provider requesting information for EDI set up.

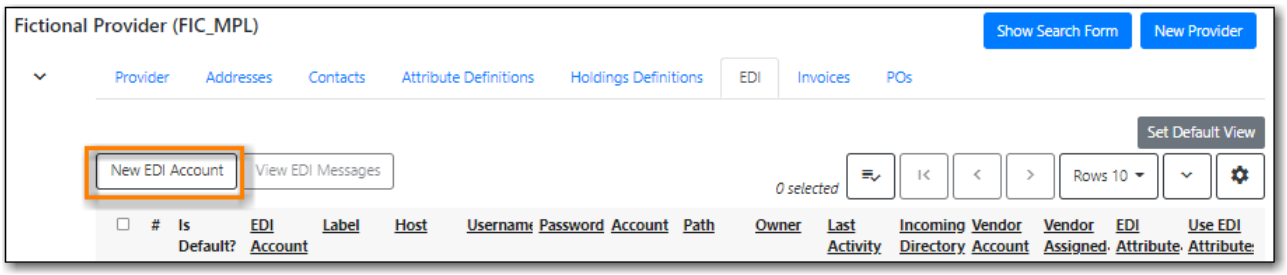
Most providers will send you:

- Host
- Username
- Password
- Path
- Incoming Directory
- Provider's SAN

Some providers will send additional account information that goes into the Account, Vendor Account Number, and/or Vendor Assigned Code fields.

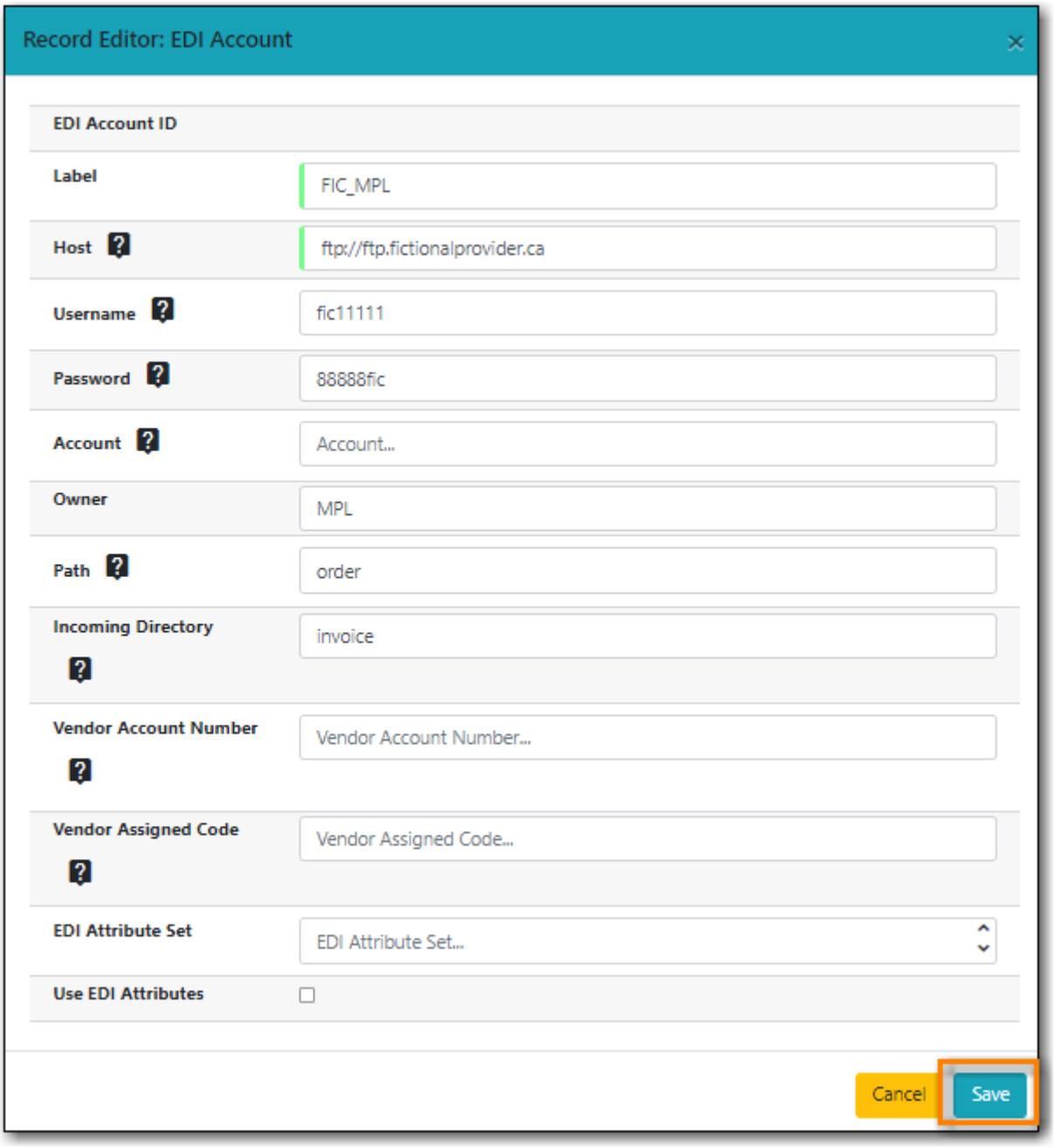
Create an EDI Account

1. Click **Administration → Acquisitions Administration → Providers**.
2. Select the provider you would like to create an EDI account for from the list.
3. Click on the **EDI** tab and click **New EDI Account**.



4. A pop-up will appear.
5. In the Label field, enter a name for the EDI account.
    a. The name should be entered as PROVIDERCODE_LIBRARYCODE. This enables Co-op Support to easily identify the owning library of the EDI account when troubleshooting.
6. In the Host field, enter the requisite FTP or SCP information supplied by your provider.
7. In the Username field, enter the username supplied by your provider.
8. In the Password field, enter the password supplied by your provider.
9. Select your library as the Owner from the drop down menu. Multi-branch libraries should select their top level organizational unit.
10. In the Provider field, enter the code used in Evergreen for your provider.
11. In the Path field, enter the path supplied by your provider.
12. In the Incoming Directory field, enter the incoming directory supplied by your provider.
13. If your provider supplies it, enter the relevant information in the Account, Vendor Account Number, and/or Vendor Assigned Code fields

14. Ensure the box for **Use EDI Attributes** is unchecked.
15. Click **Save**.



21.4.3. View EDI Messages

The EDI Messages screen displays all incoming and outgoing messages between the library and the provider.

View EDI Messages

1. Click **Administration → Acquisitions Administration → EDI Messages**
2. The messages will display. Use the column headers to sort.

21.5. Enhanced On Order records

21.5.1. Enhanced On Order Records

Enhanced On Order Records include holdings information (quantity, owning library, shelving location & circulation modifier) in a 9xx field. After you place an order on your vendor's website a file of brief MARC records with holdings information will be available for the titles you ordered.

21.5.2. Shelf Ready Items

In addition to everything you get with Enhanced On Order Records, Shelf Ready Items arrive at your library with their processing done and ready for your patrons to use. When Shelf Ready Items are sent to your library a file of matching full MARC records are sent to the Co-op for loading. These full records include the barcodes for your items. When you physically receive the items all you need to do is check them in and then shelve them.

There are additional costs for Shelf Ready Items

Admin The following setup must be completed in order to complete this workflow.

The line item templates are created on the provider's website. Contact Co-op Support if you are interested in ordering Shelf Ready Items.

A 970 holdings tag is set up in the provider's record.

The 970 holdings tag is set up with the actual provider to contain the following subfields:

m: circ modifier

l: copy location

e: estimated price

f: fund code

o: owning library

q: quantity

The subfields used will depend on the provider. $o must always be used.

An EDI Account is set up to send orders and receive invoices

Chapter 22. Acquisitions Reports

Acquisitions report templates can be found in the Acquisitions sub folder in the Sitka templates shared folder.

1. Click **Administration → Reports → Shared Folders → Sitka Templates → Acquisitions**
    - Line items received but not invoiced.
        - Shows you line items which have been marked as received, but have not yet been invoiced.
    - Line items invoice but not received.
        - Shows you line items which have been marked as invoiced, but have not yet been received.
        - This one is particularly important for sites which receive EDI invoices
    - Line Items with the Status of On-order
        - This template will produce a report of all line items with the status of on-order.
    - Fund Report by Year
        - This report will display your budget (total allocated), amount of money encumbered, amount of money spent, and current money available (after spent and encumbered) for all of the funds for your library for the specified year.
    - Claim Ready Items
        - This report will show you claim ready items

Sitka’s Acquisitions Defaults

Chapter 23. Currencies and Exchange Rates

23.1. Currency Types

Currency types are assigned to funds, funding sources, and providers in the administrative module. When a fund is applied to a copy or line item for purchase, the item will be purchased in the currency associated with that fund.

Sitka's Currency Defaults

- Canadian Dollars
- U.S. Dollars
- European Euros
- U.K. Pounds Sterling
- Australian Dollars
- New Zealand Dollars
- Swiss Franc

23.2. Exchange Rates

Exchange rates define the rate of exchange between currencies. Evergreen uses these exchange rates only for certain situations.

- When the currency of the fund that is used for the purchase is different from the currency of the provider, as listed in the provider's profile, Evergreen will use the exchange rate and the estimated price to calculate the amount to encumber for the item in the currency of the fund and debit the fund accordingly.
- When money is transferred between funds that use different currency types Evergreen will automatically use the exchange rate to convert the money to the currency of the receiving fund.
- When money is allocated from a funding source to a fund that uses a different currency types Evergreen will automatically use the exchange rate to convert the money to the currency of the receiving fund.

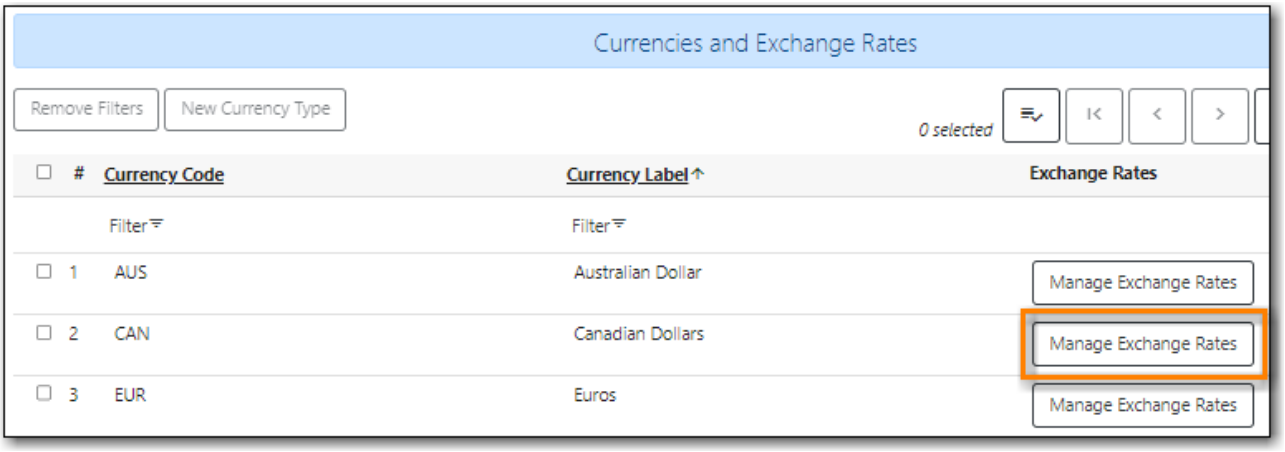
NOTE

Exchange rates are maintained beween Canadian dollars and the other currencies set in Evergreen.

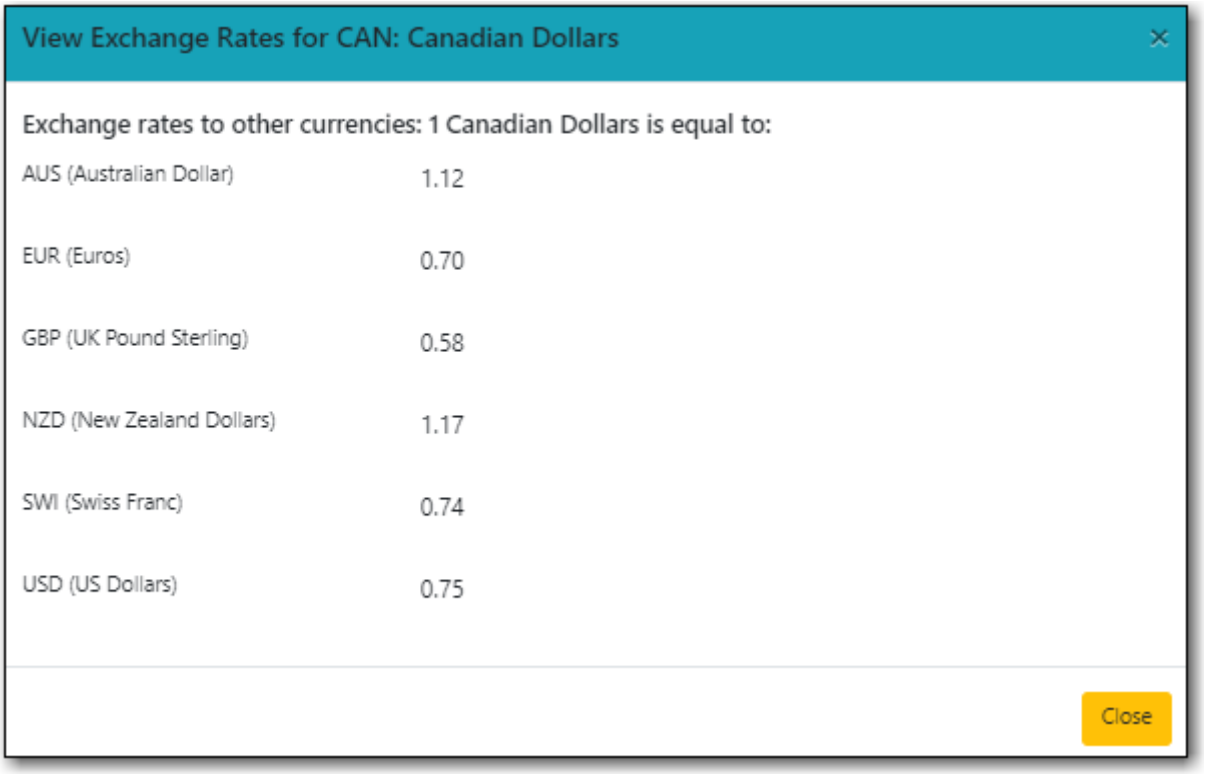
Co-op Support updates the exchange rates on the first business day of each month using the Google Currency Converter.

To view the current exchange rates in Evergreen:

1. Go to **Administration** → **Acquisitions Administration** → **Currencies and Exchange Rates**.
2. Click on **Manage Exchange Rates** for Canadian Dollars.



3. The pop up will display the exchange rates currently being used. Exchange rates apply to the entire consortium so only Co-op Support can update them.



Chapter 24. Cancel Reasons

You must choose a Cancel Reason if a copy, line item or purchase order is cancelled. The most common cancel reasons have been set in the Acquisitions Module.

Suspend or delay a purchase and keep debits

- Delayed: Damaged
- Delayed: Backordered
- Delayed: Delivered But Lost
- Delayed: Postponed
- Delayed: Reprint under consideration

Cancel a purchase and release debits

- Canceled: Account cancelled
- Canceled: Already delivered
- Canceled: Already owned
- Canceled: Canceled order
- Canceled: Discontinued
- Canceled: Duplicate
- Canceled: Duplicate order
- Canceled: Incorrect order
- Canceled: Invalid ISBN
- Canceled: Items blocked from crossing border
- Canceled: Lost goods
- Canceled: Miscellaneous
- Canceled: Never received
- Canceled: No longer available
- Canceled: No longer needed
- Canceled: Not found
- Canceled: Not in process
- Canceled: Not in stock
- Canceled: Out of business
- Canceled: Out of print
- Canceled: Out of stock indefinitely
- Canceled: Overbudget

- Canceled: Provider will not fill order
- Canceled: Publication cancelled
- Canceled: Quantity change
- Canceled: Repriced
- Canceled: Unauthorized order
- Canceled: Wrong author
- Canceled: Wrong edition
- Canceled: Wrong provider
- Canceled: Wrong title

Chapter 25. Invoice Item Types

Invoice Item Types allow you to enter additional charges on a purchase order or invoice.

Charges for bibliographic items are listed separately from these additional charges on a purchase order or invoice.

Invoice Item Types are either set to Prorate = TRUE or Prorate = FALSE. When the **Prorate** button is selected on an invoice, the system will prorate any charges where Prorate = TRUE. This means that payment for the Invoice Item Type will be divided by all the funds in use on the invoice in proportion to the amount being spent by each fund on the invoice.

Sitka's Invoice Item Type Defaults

- Access Fee (f)
- Blanket Order (f)
- Cataloguing Charge (f)
- Direct Purchase (f)
- GST (No Prorate) (f)
- Goods and Services Tax (t)
- Handling Charge (t)
- Harmonized Sales Tax (t)
- Import Fee (t)
- Lamination fee (t)
- Lamination fee - No Prorate (f)
- Misc - No Prorate (f)
- Non-library Item (f)
- PST (No Prorate) (f)
- Processing Fee - No Prorate (f)
- Processing Fee - Prorate (t)
- Provincial Sales Tax (t)
- Refund (f)
- Serial Subscription (f)
- Serial Supplemental Charges (f)
- Shipping Charge (t)
- Tax (t)

NOTE	A **(t)** indicates that the charge is proratable, a **(f)** indicates that it is not.

Chapter 26. Payment Methods

Invoice payment methods are the ways you pay your providers for your purchases. The Invoice Payment Methods appear as a drop down menu in the invoice payment method field on the invoice.

The most common invoice payment methods have been set in the Acquisitions Module.

Sitka's Invoice Payment Method Defaults

- American Express
- Bank Draft
- Cash
- Cheque
- Credit
- Debit
- Direct Billing
- Electronic Funds Transfer
- Mastercard
- Paypal
- VISA
- Wire Transfer

Chapter 27. Line Item MARC Attributes

Line item attributes define the fields that Evergreen needs to extract from the bibliographic records that are in the acquisitions database to display in the catalogue.

These attributes also appear as the fields in the New Brief Record interface.

Sitka's Line Item MARC Attribute Definition Defaults

- Author of Work
- Edition
- Identifier
- ISBN
- ISSN
- Language of Work
- Local Notes
- Pagination
- Price
- Publication Date
- Publisher
- Title
- UPC

Chapter 28. New Sitka Defaults

New Sitka-wide defaults are added to Evergreen on an as needed basis. If your library requires a new default please follow the guidelines below to submit your suggestion.

Guidelines for Submitting Suggestions for New Defaults

1. Submit a ticket to Co-op Support.
2. Enter a subject including ACQ DEFAULT, the category your default falls under, and your suggested default.
    a. Example: ACQ DEFAULT: Cancel Reason - Duplicate Order
3. In the body of the ticket describe how your default will be used. Please include any information you feel is relevant.

TIP	All Sitka Acquisitions libraries will be able to see and use this default so please avoid names that are specific to your library.

Sitka Support will review all suggestions and add new defaults to Evergreen as needed.

Appendix A: Licensing

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