

# Acquisitions PINES-wide Defaults

PINES has set several consortium wide defaults in the Acquisitions module. This chapter describes the defaults that are currently in place. Libraries that wish to request additional defaults may do so.

## Currency Types

Currency types are assigned to funds, funding sources, and providers using Acquisitions Administration. 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.

### **PINES Currency Type Defaults**

The currencies set in Acquisitions are:

- US Dollars
- Canadian Dollars
- Euros
- Mexican Peso
- Brazilian Real

## Exchange Rates

Exchange rates define the rate of exchange between currencies. Evergreen uses these exchange rates in several 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 different currency types, Evergreen will automatically use the exchange rate to convert the money to the currency of the receiving fund.

### **PINES Exchange Rate Defaults**

The exchange rates have been set in the Acquisitions Module. These are:

- U.S. Dollars to Canadian Dollars
- Canadian Dollars to U.S. Dollars
- Euros to U.S. Dollars
- U.S. Dollars to European Euros
- U.S. Dollars to Mexican Peso
- Mexican Peso to U.S. Dollar
- U.S. Dollars to Brazilian Real
- Brazilian Real to U.S. Dollars

PINES is in the process of determining an official source to use for exchange rates and the frequency of updates. If you require an exchange rate not listed here, please submit a HelpDesk Ticket.

## Cancel Reasons

Evergreen allows you to define the reason for which a copy, line item or purchase order is canceled. Applying a cancel reason prevents the item from appearing in a claims list and allows you to cancel any debits associated with the purchase.

Cancel reasons that are set to “keep debits?” enable you to suspend or delay a purchase. For more information on canceling and suspending purchases, see [Cancel/Suspend Acquisitions](#).

### PINES Cancel Reason Defaults

The most common cancel reasons have been set in Acquisitions. These are:

Label	Description	Keep Debits
Cancelled: Account Cancelled	Account has been cancelled with the provider	No
Cancelled: Already Delivered	Item has already been delivered	No
Cancelled: Already Owned	Item is already owned	No
Cancelled: By Vendor	Line item cancelled by vendor	No
Cancelled: Cancelled	Cancelled by publisher	No
Cancelled: Deleted	The information is to be or has been deleted.	No
Cancelled: Discontinued	Discontinued	No
Cancelled: Duplicate Order	Order is a duplicate	No
Cancelled: EBL	End of Backorder Life	No
Cancelled: Incorrect Order	Order is incorrect	No
Cancelled: Invalid ISBN	ISBN is unrecognizable	No
Cancelled: MOD	Must Order Direct from publisher, vendor will not supply	No
Cancelled: Miscellaneous	Miscellaneous	No
Cancelled: No longer needed	Item(s) have not been received and are now no longer needed	No
Cancelled: Not Accepted	This line item is not accepted by the seller.	No
Cancelled: Not Found	This line item is not found in the referenced message.	No
Cancelled: NS	Not stocked / Not in stock	No
Cancelled: Never Received	Item never received	No
Cancelled: OP	Out of Print	No
Cancelled: OS	Out of stock	No
Cancelled: OSI	Out of stock indefinitely	No
Cancelled: Out of Business	Out of Business	No
Cancelled: Over Budget	Over budget	No

Label	Description	Keep Debits
Cancelled: PPI	Publication Postponed Indefinitely	No
Cancelled: Postpone	Title has been postponed	No
Cancelled: Provider Will Not Fill	Provider will not fill order	No
Cancelled: Repriced	Item has been re-priced	No
Cancelled: Wrong Ed	Wrong edition	No
Cancelled: Wrong Provider	Ordered from the wrong provider	No
Delayed: Accepted with amendment	Accepted with changes which require no confirmation.	Yes
Delayed: Accepted without amendment	This line item is entirely accepted by the seller.	Yes
Delayed: Backorder	The quantity of goods that is on back-order.	Yes
Delayed: Changed	The information is to be or has been changed.	Yes
Delayed: Damaged	Item delivered damaged	Yes
Delayed: Delivered but Lost	Delivered but not received; presumed lost	Yes
Delayed: NYP	Not yet published	Yes
Delayed: No Action	This line item is not affected by the actual message.	Yes
Delayed: Ordered Quantity	[6024] The quantity which has been ordered.	Yes
Delayed: Pieces Delivered	Number of pieces actually received at the final destination.	Yes
Delayed: Split Quantity	Part of the whole quantity.	Yes
Delayed: TOP	Temporarily Out of Print	Yes
Delayed: TOS	Temporarily Out of Stock	Yes

If you require a cancel reason not listed here, please submit a Helpdesk Ticket.

## Vendor Cancel Codes

Additionally, if you use Baker & Taylor as a vendor, they have a list of explanations for their cancel codes [here](#).

## Ingram Cancel Codes

## Invoice Item Type

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 Save and Close 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.

## PINES Invoice Item Type Defaults

The default invoice item types are:

Charge Type	Use	Code
Blanket order	An amount to be encumbered and associated with multiple invoices.	BLA
Cataloging charge	Charge for cataloging services.	CAT
Cataloging charge Prorated	Cataloging services charge, to be split across all funds used on an invoice.	CAT-P
Database Access	Charge for database access.	DA
Database Access-Prorated	Charge for database access, to be split across all funds used on an invoice.	DA-P
Handling Charge		HND
Library Payment	For lost and/or damaged charges being sent to another library system.	LIBPMT
Materials	For items not accounted for in a line item	MAT
Non-Library Item	Items not related to library materials (e.g. supplies).	ITM
Original Cataloging Charge	Charge for original cataloging.	OCC
Original Cataloging Charge Prorated	Original cataloging charge split across funds used on the invoice.	OCC-P
Processing Fee		PRO
Processing Fee Prorated		PRO-P
Serial Subscription	Charge for serial subscription.	SUB
Shipping Charge	Charge for shipping materials.	SHP
Shipping Charge Prorated	Shipping charges split across funds used on the invoice	SHP-P
Tax		TAX

If you require an invoice item type not listed here, please submit a Helpdesk Ticket.

## Invoice 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.

### PINES Invoice Payment Methods Defaults

The most common invoice payment methods have been set in Acquisitions. These are:

- Cash
- Check
- Credit Card
- Debit Card
- Electronic Funds Transfer
- MasterCard
- PayPal
- VISA

If you require an invoice payment method not listed here, please submit a Helpdesk ticket.

## Line Item MARC Attribute Defintions

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 catalog.

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

### Line Item MARC Attribute Definitions Defaults

- Author
- Edition
- Estimated Price
- Identifier
- ISBN
- ISSN
- Language
- Pagination
- Publication Date
- Publisher
- Publisher Number
- Title
- UPC

If you require a line item MARC attribute definition not listed here, please submit a Helpdesk ticket.

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

Permanent link:

<https://pines.georgialibraries.org/dokuwiki/doku.php?id=acq:defaults&rev=1555336115>

Last update: **2019/04/15 13:48**

