

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: FYE | Cancelled for fiscal year end | 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 |

| Label | Description | Keep Debits |
|-------------------------------------|--|-------------|
| Cancelled: Over Budget | Over budget | No |
| 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

Some vendors have provided documentation on the meaning of their cancel codes in cancellation reports, to help you choose the correct cancel reason in Acquisitions.

Baker & Taylor cancel codes

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 Definitions

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.

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