

PINES Acquisitions

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

Through Acquisitions, staff are able to:

- create selection lists which can be shared by users,
- convert selection lists into purchase orders,
- create purchase orders for non-library materials such as processing supplies,
- receive entire purchase orders, individual line items, and single copies,
- create invoices from purchase orders.

Evergreen tracks items through the entire acquisitions process. When a purchase order is activated, the bibliographic records and holdings are loaded into the catalog and the funds for the purchase order are encumbered in the system. When an invoice is created and filled in-or sent electronically by the vendor-the funds are spent.

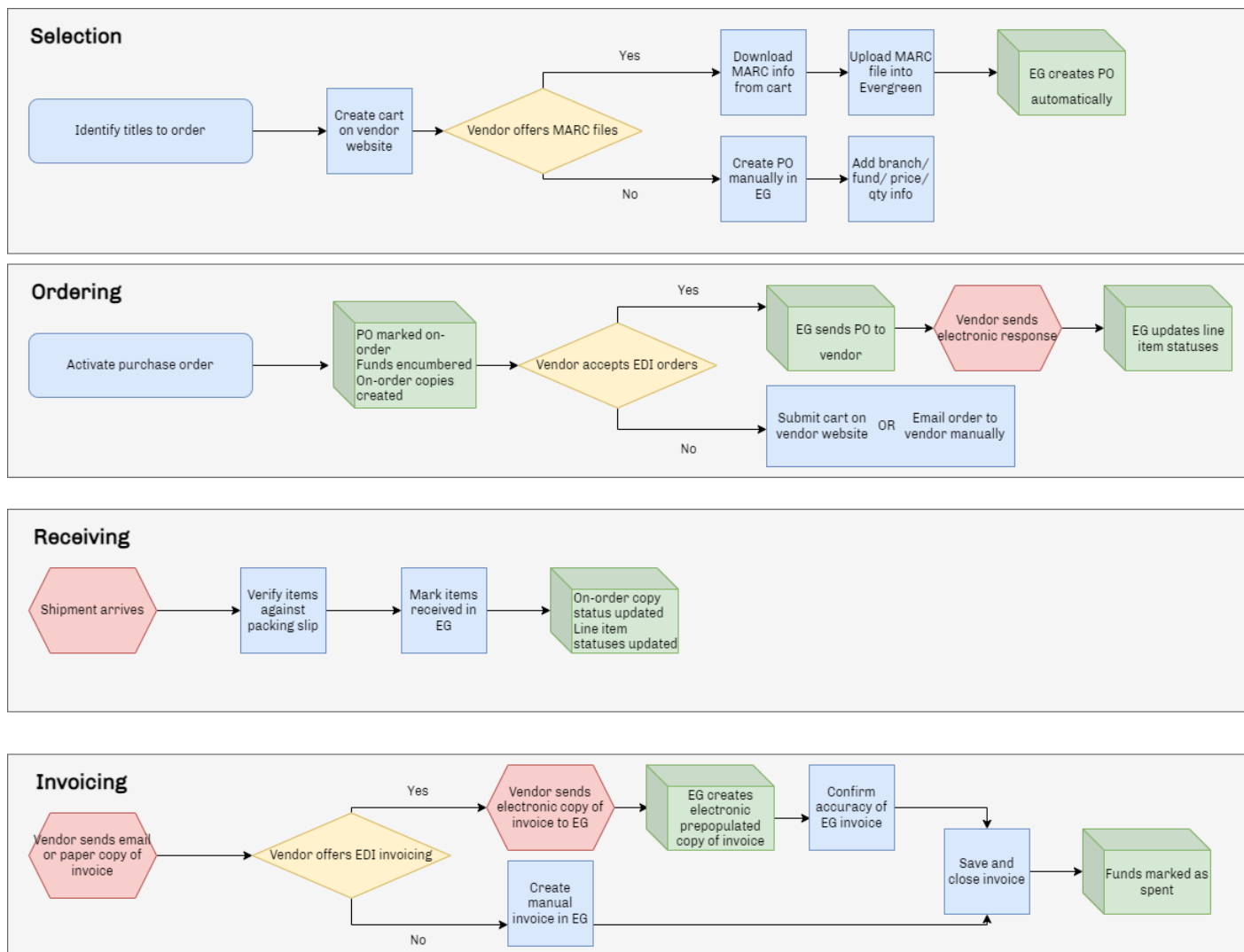
When should libraries use acquisitions?

When you want...

- Close to real-time tracking of your collections budget, including encumbrances and spent monies
- To use Evergreen to place orders electronically with your vendors.
- To track later circulations of items that you purchased
- A structured system for tracking what items have been received and what are still outstanding
- A way to compare what's been received vs what you're being invoiced for

General Workflow

This diagram illustrates the general workflow of the Acquisitions module. (Click to see larger)



Stop Using Acquisitions

Some libraries want to “test drive” Acquisitions for a certain period of time to determine if it's useful for their library. This is perfectly fine, with one caveat.

It is suggested to use Acquisitions for a period of at least 6 months to 1 year to really get a handle on how it works and its benefits. Collection management is a drawn out process; you may order in one month but not get invoices or items in until a month or two later, which is then followed by the cataloging of the items. Therefore, you want to give Acquisitions time to actually go through the full lifecycle of a few orders, and potentially do a year-end closeout.

If after that time period you decide that it's not working for your particular circumstances, PINES staff can withdraw you from using the module.

To stop using Acquisitions, all that would be needed is the written confirmation from the director of the system.

From that point, the actual stopping of Acquisitions would involve PINES contacting any EDI-enabled

vendors to revert your accounts from using EDI ordering and invoicing back to “normal” ordering. We would also run cleanup reports to discard any remaining Acquisitions barcodes and close out any open purchase orders and invoices.

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