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, the funds are spent.

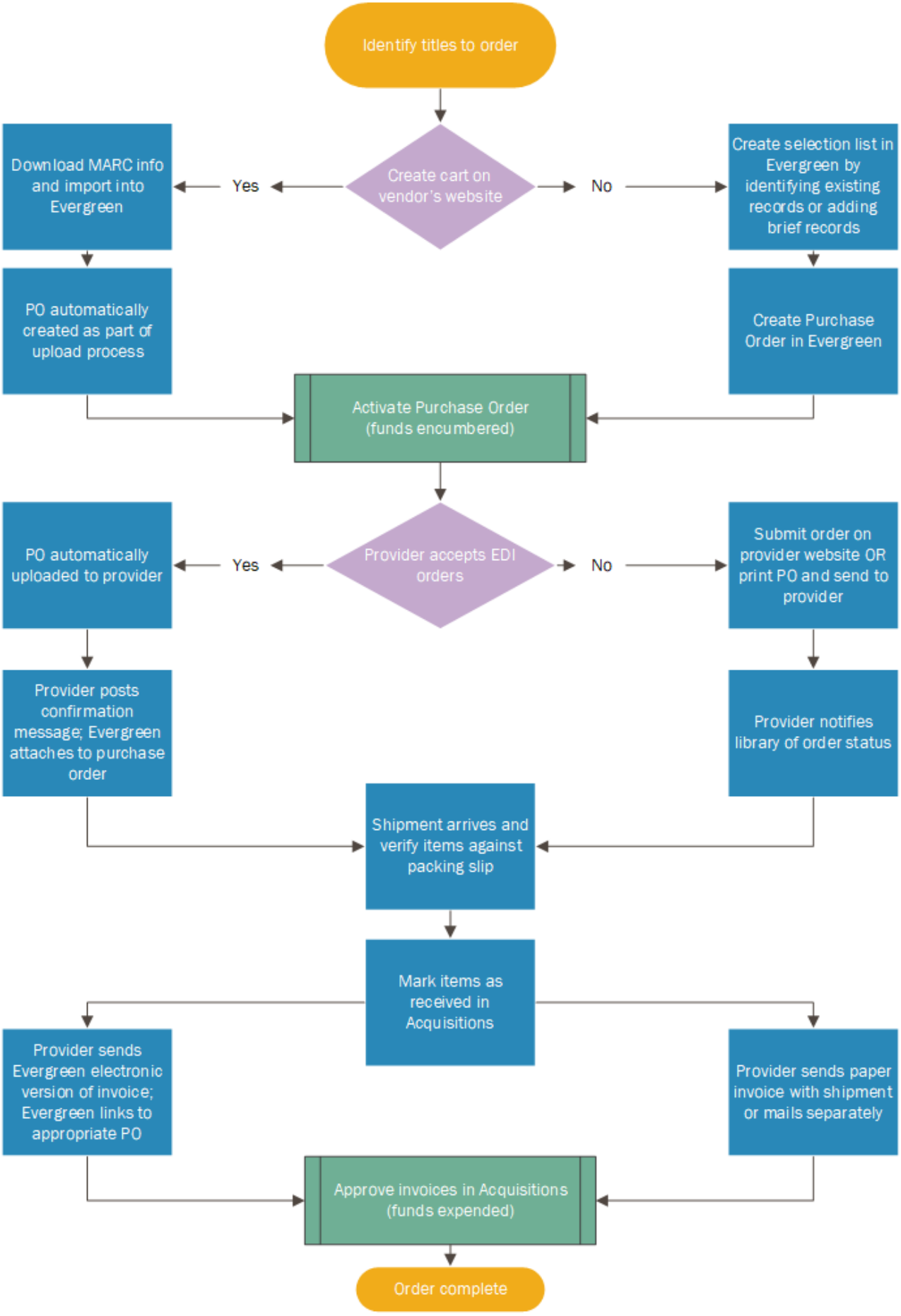
When should libraries use acquisitions?

- When you want to track spending of your collections budget.
- When you want to use Evergreen to place orders electronically with your vendors.
- When you want to import large batches of records to quickly get your on-order titles into the system

If your library simply wants to add on-order copies to the catalog so that patrons can view and place holds on titles that have not yet arrived, acquisitions may be more than you need. Adding those on-order records via cataloging is a simpler option that works well in this case.

General Workflow

This diagram illustrates the general workflow of the Acquisitions module.


Identify titles to order
Create cart on vendor's website
Yes
No
Download MARC info and import into Evergreen
Create selection list in Evergreen by identifying existing records or adding brief records
PO automatically created as part of upload process
Create Purchase Order in Evergreen
Activate Purchase Order (funds encumbered)
Provider accepts EDI orders
Yes
No
PO automatically uploaded to provider
Submit order on provider website OR print PO and send to provider
Provider posts confirmation message; Evergreen attaches to purchase order
Provider notifies library of order status
Shipment arrives and verify items against packing slip
Mark items as received in Acquisitions
Provider sends Evergreen electronic version of invoice; Evergreen links to appropriate PO
Provider sends paper invoice with shipment or mails separately
Approve invoices in Acquisitions (funds expended)
Order complete

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