

Maintenance: The Care and Feeding of Acquisitions

In general, Acquisitions maintenance happens with your day-to-day work. Things are ordered, received, and invoiced as you go through your general processes. However, there are a few things you that need to do that are out of band.

Cancellation Reports

At given intervals, each of your vendors should be providing you with a cancellation report. This includes titles/copies that have been cancelled by the vendor for some reason. Because we only get back one order response from EDI vendors, right when we first order, often things are later cancelled with the vendor. For example, they may go out of print, or you may hit your end of backorder life (most libraries set this at 3 or 6 months). In these cases, the vendor provides you with a list of these titles that they've cancelled.

Since Acquisitions doesn't know anything about that, you need to cancel those items in Acquisitions. This (a) makes it so you have an accurate representation of what is on order for your library, and (b) unencumbers your money. You don't want to leave these hanging around in the system, because it gives you an inaccurate view of how much you have to spend.

How to Reconcile Your Cancellation Reports with Acq

1. Generally your cancellation report includes the line item ID for the title being cancelled. We pass this to the vendor when you order via EDI. At the absolute bare minimum, it will include the purchase order that the item is on.
2. Whether you have the lineitem ID or just the PO, you can use the Search screen to locate those items to cancel them. See: **Add here**
3. When choosing your cancel reason, choose the cancel reason that is most appropriate to the situation. So if they were cancelled because they were at the end of backorder life, you want to use Cancelled: EBL. If they were cancelled because they went out of Print, you can use Cancelled: OP. Either way, you **must** use one of the cancel reasons that begins with "Cancelled."

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