Permissions

Acquisition permissions follow the same hierarchical permissions structure employed in other Evergreen modules and also relies on the user's work location assignment. However rules and assignment of Acquisition permissions is managed differently than the normal Circulation, Cataloging and Local Admin roles. The complexity and financial impact of Acquisitions requires that PINES and Local Library Staff use Evergreen's security features to protect the data and to enable the ability to track and troubleshoot with granularity, by Library System and user.

Therefore it is required that Acquisitions staff users not use generic logins and be assigned acquisitions roles as a secondary set of permissions to a specific, personally related login account.

Acquisitions Permissions Descriptions
There are five acquisitions roles with assigned permissions; AcqAdmin, AcqFin, AcqSel, AcqList, AcqRec.

ACQADMIN

Each PINES library system who implements Acquisitions is required to have a Local Acquisitions Administrator called AcqAdmin. This role is essentially equal to the current LocalAdmin role. The AcqAdmin is responsible for being a point of contact for consortium-level acquisitions information, assigning lower ACQ permissions, and establishing settings under server administration. AcqAdmin, is assigned as a secondary permission, by PINES staff to Library staff as designated by the Library Director.

ACQADMIN has access to all Acquisitions permissions.



Acquisitions Permissions Designations This worksheet must be completed, signed and returned by the Library Director before a staff member may be given ACQADMIN or ACQFIN permissions.

ACQFIN

ACQFIN is responsible for all financial transactions. This includes maintaining funds and funding sources, ordering, claiming, invoicing, setting up and maintaining the Library System's acquisitions financial structure and the library's providers.

ACQFIN has permissions to:

- Create, edit, and delete funding sources
- Create, edit, and delete funds
- Allocate credit and transfer funds to funding sources and funds
- Perform year-end close-out

- Create, edit, and delete providers
- Create, view, rename, print, and activate purchase orders
- Add notes and charges to purchase orders
- View purchase order history
- Cancel purchase orders, line items, and copies
- Apply distribution formulas to line items
- Receive and un-receive purchase orders, line items, and copies
- Change a line item's claim policy
- Claim line items and copies
- Print claim vouchers
- Create, view, print, authorize payment for and close invoices
- Reopen invoices
- Add and prorate charges to invoices

ACQSEL (deprecated)

There are two permissions groups for selectors: ACQSEL and ACQLIST. ACQSEL is more permissive than ACQLIST.

ACQSEL administers selection lists across a library system, creates selection lists by bringing in order records or creating records, and prepares lists for ordering but cannot order.

ACQSEL includes the same permissions as ACQLIST, but additionally can:

- Apply distribution formulas to line items
- View fund summaries for multiple years and location
- Create, view, rename purchase orders
- Upload bibs & items for selection lists
- View debits associated with a fund

ACQLIST (deprecated)

ACQLIST is intended for library or subject selectors. ACQLIST can create selection lists from new brief records or existing catalog records but cannot bring in order records, can designate the choices of items from a list, the quantity, funds and distribution of items, can add notes to line items

Other ACQLIST permissions include:

- Perform searches using the Acquisitions General Search
- Create, merge, clone, and delete selection lists
- Add line items to a selection list
- View and use selection lists created by another user
- Create brief records
- Add copies, alerts, and notes to line items
- Apply funds to copies and line items on a selection list

- Link line items to bibliographic records in the catalog
- Mark line items selector-ready and/or order-ready
- View, but not create, purchase orders
- View fund summaries for the current year for the location the workstation is registered to

ACQREC

For Library Systems requiring a separation of ordering and receiving duties for size or audit purposes there is; ACQREC.

- Receives orders for system
- Receives and un-receives purchase orders, line items, and copies
- View purchase order history

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