

Starting Acquisitions

If you believe that Acquisitions may be useful for your library system, here are some things you may want to consider.

Training



Like the cataloging CAT1 training, Acquisitions training is required before staff are given Acquisitions permissions.

Training is generally one or two in-person or screensharing online sessions, and is conducted by the PINES Acquisitions Specialist. The training covers the day-to-day work of Acquisitions, as well as touching on the pieces needed to setup Acquisitions for use. Any staff member needing **ACQADMIN** or **ACQFIN** permissions is required to complete this training before being granted permissions. It is highly encouraged that other staff who will be using the Acquisitions module also receive training.

After the initial training, at least one additional screenshare session will be scheduled. The intent is that after getting an overview of how Acquisitions functions, that much of the training will go hand-in-hand as users start to work with the module so they retain the information more easily and have a better idea of what questions to ask.

Soft Skills

It's not a **requirement** to start Acquisitions, but it is a good idea that if you're interested in using Acquisitions that the person who does your ordering and your bookkeeper have an open working relationship. Acquisitions needs to be kept up to date as far as available funds, so if your bookkeeper moves funds without letting your ordering person know then Acquisitions has just become useless for keeping track of budgets. This can easily lead to over/under-spending since those making purchases don't have an accurate view of their budgets, which is a core tenet of using Acquisitions.

Best practice would be for your local acquisitions coordinator to compare fund balances with bookkeeping once a month. If that's not possible / preferable, then at least having an open line of communication about any changes in fund balances is necessary.

Example: You started the year with \$20k in local materials funds, which was then entered into Acquisitions. Two months later, the roof is leaking and you need to shift \$10k of those funds into repairing the roof. This needs to be communicated to your local acquisitions coordinator so they can adjust their funds in Acquisitions.

Monetary Investments

If your library wishes to do **EDI ordering**, each location that directly receives materials from the vendor will need to have a **SAN**. These are purchased from **Bowker** and cost \$150 each. So for example, if you receive all purchased materials at one central location, you would only need one SAN. If you have purchased materials drop-shipped to 3 different branches, you would need 3 SANs.

Most of the libraries in Georgia already have SAN numbers. To confirm if your library system and/or branches have SANs, please see **this** spreadsheet. All information is taken from the 2017-2018 edition of the *American Library Directory*.

To download MARC order files from vendors to be uploaded into Evergreen, some vendors require that your account have a particular setting enabled. You may want to review the list of vendors who offer **MARC downloads** to check if your vendors' offer this service and if there is an additional fee. Uploading MARC order files into Evergreen is not required, but it is highly recommended.



This is not the same thing as using vendor cataloging. It is a different process.

Time to Get Started

Getting started with Acquisitions has several portions. Generally:

- Initial discussion with PINES Acquisitions Specialist
- Training
- Discussion and decision-making on what you want your setup to look like
- Library staff creating the setup pieces in Evergreen
- Turning on EDI and MARC downloads with vendors

This time frame can vary widely depending on the skills and time capabilities of library staff. It could be done in two weeks, or it could take two months. It also depends on your vendors and your current setup with them. Many times vendor accounts were set up many years ago, and underlying oddities aren't uncovered until the EDI setup process starts. Library staff also need to have access to information, like vendor account numbers and budget numbers. That may take time to gather.

The actual setup in Acquisitions generally takes no more than a day or two. But depending on your library's setup, it may take longer to gather information and coordinate with vendors.

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