

# Starting Acquisitions

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

## Competencies

Before moving to the live PINES server, libraries testing Acquisitions will need to demonstrate ongoing competency in the following areas. This is to ensure the integrity of the PINES database.

- Fund set-up and management including verification that fund tracking is working;
- Order management including but not limited to: selection list creation, purchase order creation, EDI ordering, uploading order records from vendors, non-EDI ordering, receiving orders, invoice creation, linking EDI invoices to purchase orders, paying invoices, canceling orders;
- Workflow testing and integration with cataloging;
- Reports testing.

## Training

Like the cataloging CAT1 training, Acquisitions training is required before staff are given Acquisitions permissions. Training is generally 1 to 2 days long and is conducted by the PINES Acquisitions Specialist. 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. If staff members need additional training at a later date, additional in-person training days can be set or personal online training is also available.

## 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. For Baker & Taylor, this setting is called MARC Profiles. There may or may not be a charge for this service; contact your vendor representative to inquire if (a) your library already has this service and if not (b) if there is a charge to have this service enabled.

Uploading MARC order files into Evergreen is not required, but it is highly recommended.

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