

Potential Workflows

As with most things, there are several different ways to do most tasks in Acquisitions. The workflows provided below are just a jumping off place to give some structure to how you think about Acquisitions and how the process works. They are usually not the only way to do something, but they are one way to do something.

A newspaper subscription

Scenario: You have one or more subscriptions to a particular newspaper, let's call it the *Ledger-Enquirer*. As it's a rather small newspaper, you've just received a postcard that says your subscription is due to renew and how much your subscription cost is. You need to note and “pay” this in Acq so you can send it to your bookkeeper for payment.

1. Ensure that you have a provider profile created for the Ledger Enquirer (Acquisitions→Providers).
2. Create a **blank purchase order** that uses the Ledger Enquirer provider.
3. **Add a direct charge** with type “Serial Subscription.”
4. If you'd like, include something in the description/note fields. For example, if you receive the Ledger Enquirer at three of your branches and you are including them all on this PO, you would probably have each branch as a separate direct charge. So you could include in the note which branch this charge is for.
5. Choose the fund that the direct charge should be billed to, and fill in the price.
6. If you are including other branches, add those direct charges.
7. Click Save Charges.
8. If you are satisfied everything has been represented, click Activate. You'll notice your funds are now encumbered.
9. **Create an invoice.**
10. Fill out the invoice header information.
11. Confirm that all the direct charges that mirror the invoice/postcard in your hand are present (and nothing more!)



If you will receive more invoice/postcards—say for each of those other 2 branches—they should not be represented on this invoice. They should have their own invoice. Only represent on an invoice what you have in hand.

1. Save the invoice.
2. Close the invoice.
3. **Print the invoice.**

Some Titles Not Available at a Vendor

Scenario: If you are using a vendor that does not offer MARC records, and your work-around solution is to add the titles to a vendor that *does* offer MARC downloads and then download the cart. Sometimes you will encounter that Vendor B does not have a title that you are ordering from Vendor A. (Example: You're ordering *Insert Title Here* from Amazon, and you try to add it into a cart in Baker & Taylor but B&T does not carry that book.)

1. Add as many titles as are available to Vendor B's cart.
2. Download the cart
3. **Upload and create a PO** via Load MARC Order Records
4. **Create a brief record** for each title that you are ordering from Vendor A that were not available in Vendor B's catalog.
5. **Link each brief record to a record** in the catalog.
6. Add branch/fund/quantity info to your created line items.
7. Proceed as normal with your PO.

No Available Record in Catalog to Link To

Scenario: If you created brief records or you get the “link to catalog” link in a line item, you will need to link the line item to a catalog record. However, sometimes there may not be a record already in PINES that matches your item.

1. Search PINES for matching record
2. If there is no record in PINES that matches, open Z39.50.
3. Search for a matching record
4. If you find a match, import into the catalog
5. Return to your PO/line item and link to the record you just imported.

If there is no matching record in OCLC/Z39.50 If you have followed the steps above and there is no matching record in OCLC–

1. Return to your PO
2. When activating, choose “Activate Without Loading Items.”



Be aware that this action will mean that no acquisitions barcodes will be created for ANY line items in this purchase order.

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