Available Acquisitions Reports

The templates listed below are not the *only* templates available, but they are recommended to fulfill common needs.

Copies/Items

ACQ copies with shelving location other than ON ORDER (v2)
Shared Folders > Templates > PINESacqadmin > Copies/Items

Copies in Cataloging status older than a date
Shared Folders > Templates > PINESacqadmin > Copies/Items

List of items purchased in a time period
Filters by fund year, fund, and order date
Shared Folders > Templates > PINESacqadmin > Copies/Items

Purchases and their total circulations, filtered on active date and library
Shared Folders > Templates > PINESacqadmin > Copies/Items > Circulations

Funding Sources

List of allocations from funding source
Shared Folders > Templates > PINESacqadmin > Funding Sources

List of funding source credits
Shared Folders > Templates > PINESacqadmin > Funding Sources

Funds

Encumbered amounts by fund, filtered by fund year
Shared Folders > Templates > PINESacqadmin > Funds

Fund allocations
Shared Folders > Templates > PINESacqadmin > Funds

List of fund debits by fund
Shared Folders > Templates > PINESacqadmin > Funds

List of fund IDS
Shared Folders > Templates > PINESacqadmin > Funds

List of fund tags, by fund
Shared Folders > Templates > PINESacqadmin > Funds

List of funds with parameters
Shared Folders > Templates > PINESacqadmin > Funds

Invoices

Blank invoices
Finds invoices that are marked complete with $0.00 paid
Shared Folders > Templates > PINESacqadmin > Invoices

New EDI invoices (v2)
Shared Folders > Templates > PINESacqadmin > Invoices

Line Items

Checking Bib Matches on Line Items
Filters by PO create date on/after a date
Shared Folders > Templates > PINESacqadmin > Line Items

Providers

Expenditures by provider
Shared Folders > Templates > PINESacqadmin > Providers

Purchase Orders

Check PO for deleted bib on line items
Shared Folders > Templates > PINESacqadmin > Purchase Orders

List of purchase orders where name contains [something]
Shared Folders > Templates > PINESacqadmin > Purchase Orders

Open Order Report
Shared Folders > Templates > PINESacqadmin > Purchase Orders

POs with order date using an EDI provider
Shared Folders > Templates > PINESacqadmin > Purchase Orders
Source Paths

Year End Reports

Encumbered amounts by fund
Shared Folders > Templates > PINESacqadmin > Year End Reports

Fund Summary
Shared Folders > Templates > PINESacqadmin > Year End Reports

Line items that have not been received
Shared Folders > Templates > PINESacqadmin > Year End Reports

Line Items Using Outgoing Fund Year
Shared Folders > Templates > PINESacqadmin > Year End Reports

List of funds with parameters
Shared Folders > Templates > PINESacqadmin > Year End Reports

List of invoices that are not closed (3.2+)
Shared Folders > Templates > PINESacqadmin > Year End Reports

Purchase Order with Pending or On-Order Status
Shared Folders > Templates > PINESacqadmin > Year End Reports