



# Acquisitions Training Manual

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For up-to-date information, please see the [Evergreen Indiana Knowledgebase](#).



Most of the processes described here require Local Acquisitions Administrator, Purchaser, or Selector Permissions. In the Acquisitions Administration section, some actions are managed centrally and will be designated as such.

This manual was created using documentation by The Evergreen Project, Sitka Evergreen, Georgia PINES, and Evergreen Indiana.

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# Initial Configuration

Before beginning to use Acquisitions, the following must be configured by a Local Acquisitions Administrator or Evergreen Indiana Systems Administrator. Find more information about how to configure each at the linked pages in this manual. The [Acquisitions Planning and Configuration Worksheet](#) is a handy organizational tool when setting up acquisitions. Make a local copy or download to use.

- [Cancel/Delay Reasons](#) (optional)
- [Claiming](#) (optional)
- [Current Types](#) (defaults exist)
- [Distribution Formulas](#) (optional)
- [EDI Accounts](#) (optional)
- [Funds](#) and [Fund Sources](#) (required)
- [Invoice Item Types](#) (defaults exist) and [Invoice Payment Methods](#) (required)
- Merge Overlay Profiles and Record Match Sets - Same as those available through the MARC Batch Import/Export tool.
- [Providers](#) (required)

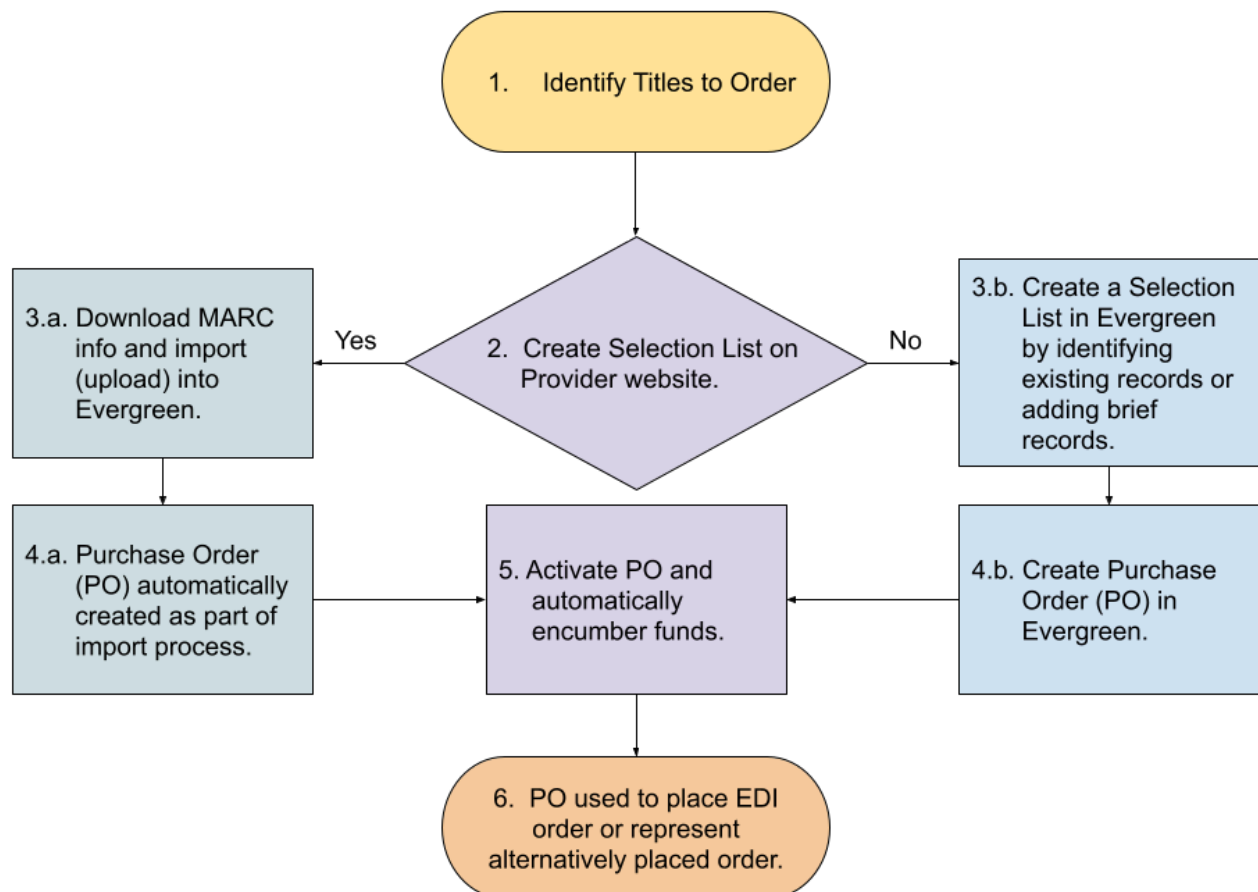
# Acquisition Workflows

## Diagrams

The following diagrams show acquisition workflows in Evergreen Indiana. Local libraries frequently have varied situations from one another which will require flexibility in the adaptation of these workflows. When using EDI to order through Acquisitions, please note the workflows on the left-hand side of the Order and Receive Materials chart. When not using EDI to order, please note the light blue workflows on the right-hand side of the Order and Receive Materials chart. These steps will be described in more detail in the Workflow Description section that follows.

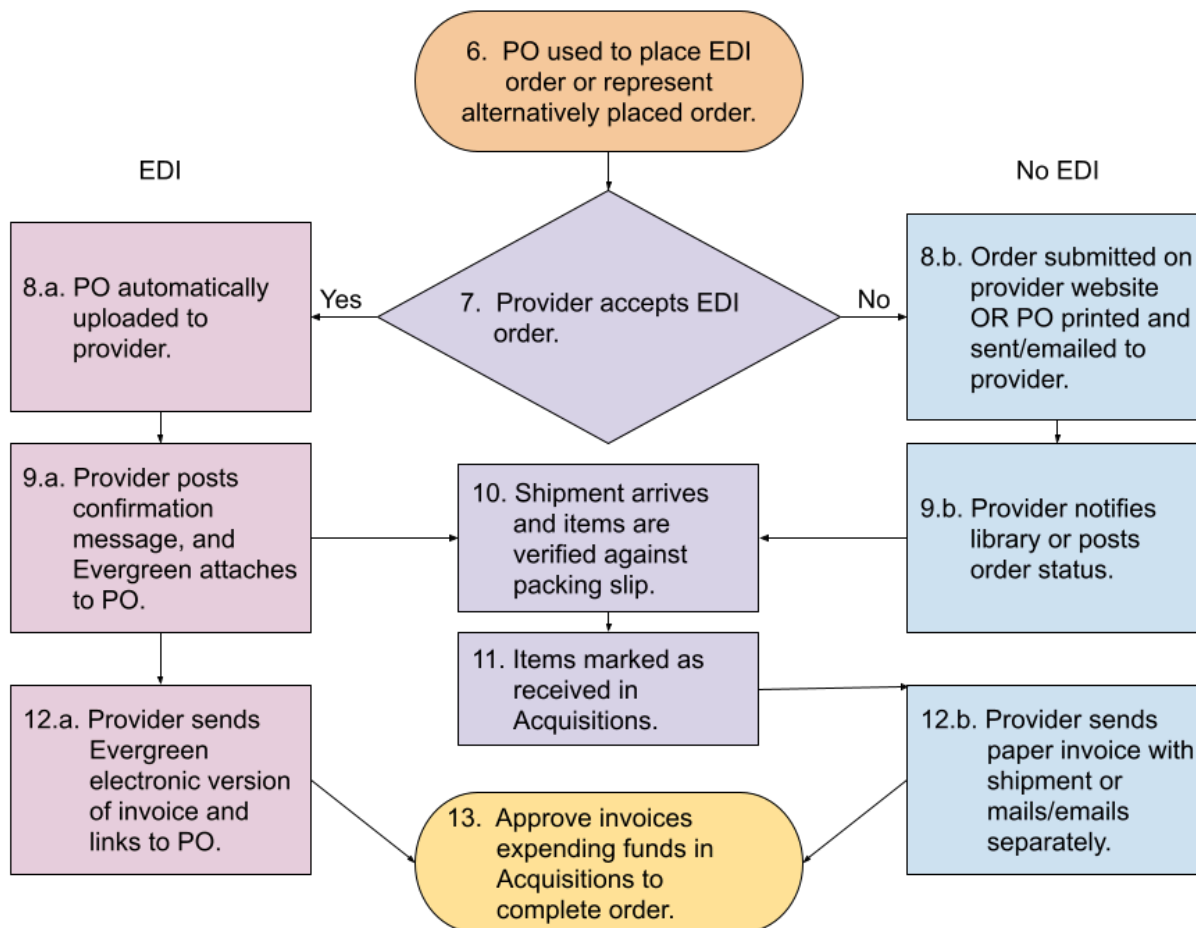
### Prepare to Order Materials

Collection development happens in libraries using many tools and personnel. The Evergreen acquisitions module is meant to bridge the gap between the intellectual, fiscal, and technical aspects of collection development. This chart shows alternative workflows to prepare to order those materials that have been identified for purchase in a library.



## Order and Receive Materials

After a Purchase Order has been created, automatic or manual processes are followed to initiate an order with a vendor, receive ordered items, prepare those items for discoverability and circulation by patrons, and disburse payment to vendors. This chart shows alternative workflows to order, receive, and pay for materials using the acquisitions module.



# Workflow Description

1. **Identify titles** to order
2. **Create Selection List** on Provider website
3. Automatic or Manual Selection Lists
  - a. **Download MARC information from the Provider website and import into Evergreen.** This MARC file functions in place of a Selection List.  
OR
  - b. **Create a Selection List in Evergreen** by identifying existing records in the catalog, importing records via z39.50 or adding brief records.
4. **Purchase Order** Creation
  - a. A **Purchase Order is created automatically** when a MARC file is uploaded (imported) to Evergreen.  
OR
  - b. **Purchase Order can be created from a Selection List.**
5. **Activate Purchase Order.** Funds will be automatically encumbered as part of this process.
6. The activated Purchase Order is used to automatically place an order via EDI or represent an order placed through alternative mechanisms.
7. Depending on whether or not a library utilizes EDI for ordering and invoicing, different things may happen.
8. **Order is placed.**
  - a. If a library is using EDI and the PO is accepted, the activated Purchase Order is automatically uploaded to the Provider, initiating order of materials.
  - b. If a library is not using EDI, an order should be submitted on the Provider website. Alternatively, the Purchase Order can be printed or saved to PDF to mail or email to the Provider.
9. **Provider updates the order status.**
  - a. If a library has initiated an order using EDI, the Provider will post a confirmation message which Evergreen will attach to the Purchase Order.
  - b. If a library has initiated an order using mechanisms other than EDI, the Provider may notify the library of the order status, post order status through an online customer portal, or provide no order status updates.
10. **Shipment arrives and items are verified against packing slip.**
11. Items verified as having been received are **marked as received** in Acquisitions.
12. The library is invoiced by the provider for items received.
  - a. For libraries utilizing EDI, the **Provider sends an electronic version invoice** to Evergreen which is accessible through the Acquisitions module. This invoice is linked to the originating Purchase Order and, if appropriate, Selection List. Likewise, the originating Purchase Order is linked to subsequent invoices.
  - b. For libraries ordering materials using alternative mechanisms to EDI, the Provider will send an invoice with the shipment or mail/email invoices separately. **These invoices will need to be recreated from the originating Purchase Order.**
13. **Invoices are approved** to expend funds in Acquisitions completing the order.

# Acquisitions Search

The Acquisitions Search interface provides a centralized place for searching Line Items, Purchase Orders, Invoices, and Selection Lists in the Acquisitions module of Evergreen. The Acquisitions Search interface can be accessed from the Acquisitions Menu by selecting General Search, Selections Lists, Purchase Orders, or Invoices.

## Default Acquisitions Search Options

### Line Items Search

The Acquisitions Search interface defaults to the *Line Item Search* tab. Here you can search across the entire acquisitions module (selection lists, purchase orders, and invoices) to find line items matching your search terms. There is not an initial default search for this tab. Users must create their search or set a default line item search. More information on how to do this is found below.

The search results consist of line items and provide links to the provider account, bibliographic record in the catalog, associated purchase order, purchase requests, and any associated invoices. Clicking on the linked Lineitem ID will bring you to the highlighted line item on the associated purchase order. All links open in a new tab.

Acquisitions Search

Legacy Search Interface

Line Items SearchPurchase Orders SearchInvoices SearchSelection Lists Search

Search for records matching 

all

 of the following terms:

Line Item Attribute - Title of work

contains

piano

⊕ ⊖

Search

Set As Default Line Item Search

Reset Default Search

☐ Retrieve Results Immediately

Remove Filters

0 selected

⌵

⏪

⏩

⏴

⏵

Rows 10

⌵

⚙

<input type="checkbox"/>	#	Lineitem ID	Title	Author	Provider	Links	Claim Policy	Status	Estimated Unit Price
<div>⌵</div>			<div>⌵</div>	<div>⌵</div>	<div>⌵</div>	<div>⌵</div>	<div>⌵</div>	<div>⌵</div>	<div>⌵</div>
			Operator:ls exactly	Operator:ls exactly	Operator:ls exactly	Enter value to filter⌵ Operator:ls exactly	Enter value to filter⌵ Operator:ls exactly	Enter value to filter⌵ Operator:ls exactly	Operator:ls exactly
<input type="checkbox"/>	1	3	Mozart and his pian...	Girdlestone, Cuthbe...	BRODART-Code	<ul style="list-style-type: none"><li>Catalog</li><li>Worksheet</li><li>Purchase Order</li><li>Requests</li><li>Invoices</li></ul>		on-order	\$12.00

Currently no actions can be taken with Line Item search results. The full integration of action functionality will be added by pending development to the acquisitions module. There is a link in the top-right corner to access the **Legacy Search Interface**. All actions can still be accessed here.

## Purchase Order Search

The *Purchase Order Search* tab allows you to conduct a search of Purchase Orders in the acquisitions module. The default search that appears when the tab is viewed is a search for all purchase orders that are in the status of on order at your library:

- Purchase orders matching all of the following terms:
  - Purchase Order - Ordering Agency is [your workstation branch]
  - Purchase Order - Status is On-Order

You can construct a new one-time search instead of using the default search or set a default purchase order search that will replace the default search described above. More information on how to do this is found below. If a user sets a new default Purchase Orders search, that search will be populated automatically when **Acquisitions** → **Purchase Orders** is selected from the main menu.

The search results will consist of purchase orders and provide links to the purchase order and the associated provider account. All links open in a new tab.

Acquisitions Search

Legacy Search Interface

Line Items Search Purchase Orders Search Invoices Search Selection Lists Search

Search for records matching **all** of the following terms:

Purchase Order - Ordering Agency

is

HUSMY-ZIO

+

-

Purchase Order - Status

is

Pending

+

-

Purchase Order - Creation Time

is on or AFTER

2021-02-04

+

-

Search

Set As Default Purchase Order Search

Reset Default Search

☒ Retrieve Results Immediately

Remove Filters

0 selected

☰

◀

<

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▶

Rows 10

▼

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<input type="checkbox"/>	#	Name	Purchase Order ID	Provider	Ordering Agency	Creation Time	Edit Time	Order Date	Status	Cancel Reason	Prepayment Required
		Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input type="checkbox"/>	1	3203	3203	ZIONS-BT-PRINT...	HUSMY-ZIO	2021-02-05 10:55	2021-02-05 10:55		pending		No
<input type="checkbox"/>	2	3204	3204	ZIONS-BT-PRINT...	HUSMY-ZIO	2021-02-05 10:55	2021-02-05 10:55		pending		No

Currently no actions can be taken with Purchase Order search results. The full integration of action functionality will be added by pending development to the acquisitions module. There is a link in the top-right corner to access the **Legacy Search Interface**. All actions can still be accessed here.



## Invoices Search

The Invoices Search tab allows you to conduct a search of Invoices in the acquisitions module. The default search that appears when the tab is viewed is a search for all open invoices at your library.

- Invoices matching *all* of the following terms:
  - Invoice - Receiver is [your workstation branch]
  - Invoice - Close Date is [unset - no date]

You can construct a new one-time search instead of using the default search or set a default invoice search that will replace the default search described above. More information on how to do this is found below. If a user sets a new default Invoices search, that search will be populated automatically when **Acquisitions** → **Invoices** is selected from the main menu.

The search results consist of invoices and provide links to the invoice, the provider account, and the shipper account associated with the invoice. All links open in a new tab.

Acquisitions Search

[Line Items Search](#) [Purchase Orders Search](#) [Invoices Search](#) [Selection Lists Search](#)

[Legacy Search Interface](#)

Search for records matching all of the following terms:

Invoice - Receiver

is

JCKSN

+

-

Invoice - Close Date

is on or AFTER

2021-02-01

📅

+

-

Search

Set As Default Invoice Search

Reset Default Search

☒ Retrieve Results Immediately

Remove Filters

0 selected

☰

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I>

Rows 10

⌵

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<input type="checkbox"/>	#	Vendor Invoice ID	Provider	Shipper	Receive Method	Invoice Date	Close Date	Receiver	Internal Invoice ID
		Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter
<input type="checkbox"/>	1	H58185220	BT-VID-ADULT-FIC-JCKSN	BT-VID-ADULT-FIC-JCKSN	PPR	2021-11-18 00:00	2021-11-18 11:32	JCKSN	11890
<input type="checkbox"/>	2	2036369943/1	BT-BOOK-PROCESS-JCKSN	BT-BOOK-PROCESS-JCKSN	PPR	2021-12-14 00:00	2021-12-14 10:15	JCKSN	12310

Invoices can be printed in this interface by right-clicking on the row of the invoice you want to print to access the *Actions for Selected Rows* menu and selecting **Print Selected Invoices**. Multiple invoices can be printed at the same time by checking the boxes of the invoices you want to print and then right-clicking to access the *Actions for Selected Rows* menu and selecting **Print Selected Invoices**.

## Selection Lists Search

The Selection Lists Search tab allows you to conduct a search of selections lists in the acquisitions module. The default search that appears when the tab is viewed is a search for all selection lists owned by the currently logged in user.

- Selection lists matching all of the following terms:
  - Selection List - Owner is [currently logged in user]

You can construct a new one-time search instead of using the default search or set a default selection list search that will replace the default search described above. More information on how to do this is found below. If a user sets a new default Selection Lists search, that search will be populated automatically when **Acquisitions** → **Selection Lists** is selected from the main menu.

The search results will consist of selection lists and provide a link to the selection list via the Name column.

The screenshot displays the 'Acquisitions Search' interface with the 'Selection Lists Search' tab active. The search criteria are set to 'all' of the following terms: 'Selection List - Org Unit' is 'PUTNM-GRE'. The 'Retrieve Results Immediately' checkbox is checked. Below the search bar, there are buttons for 'Remove Filters', 'New Selection List', and '1 selected'. The results table has columns for '#', 'Creation Time', 'Name', 'Entry Count', 'Edit Time', and 'Org Unit'. The table contains three rows of results, each with a checkbox for selection.

#	Creation Time	Name	Entry Count	Edit Time	Org Unit
1	2020-02-14 10:58	<a href="#">200114jpractice</a>	7	2020-02-14 10:58	PUTNM-GRE
2	2020-02-18 08:55	<a href="#">20200218AF</a>	102	2020-02-18 08:55	PUTNM-GRE
3	2020-02-18 10:02	<a href="#">20200218NF</a>	45	2020-02-18 10:02	PUTNM-GRE

From the selection list search results you can take the following actions:

- Clone the selected Selection List(s)
- Delete the selected Selection List(s)
- Merge the selected Selection Lists
- Create a New Selection List

Right-click on the row of the selection list to access the *Actions for Selected Rows* menu to choose an action. Multiple selection lists can be deleted or merged by checking the boxes of the selections lists you want to work with and then right-clicking to access the *Actions for Selected Rows* menu.

When a selection list is cloned, the new list's creator, owner, editor, org unit, etc. are set to the current user and workstation.

## Creating a New Default Search

In each of the Acquisitions Search tabs you can create a custom default search that will override the standard default search for the tab.

1. Construct your custom search using the drop down menus in the selected search tab.
  - a. Click the (+) to add a new field to your search and click the (-) to remove a field from your search.
2. Click the blue button that says **Set As Default [Line Item/Purchase Order/Invoice/Selection List] Search**.
  - a. You will see a green message in the lower right hand corner confirming that your default search was saved.
3. This search will now load each time you view the selected tab and will override the default search listed above.

There is also an option to automatically execute the search when the tab is opened, eliminating the need to click the Search button. This can be done by checking the box to **Retrieve Results Immediately** and then clicking the **Set As Default ... Search** button.

Both the custom default search and the selection to retrieve results immediately are saved to the workstation.

If you wish to reset a search tab to its defaults, click the **Reset Default Search** button.

# Search Syntax and Filters

To create your search, choose if your search should match all or any of the search terms you use in your search. Selecting all will conduct a stricter search that must match all of the search terms you indicate. Selecting any will return search results that match any of the search terms you indicate.

Next, select a search attribute from the drop down menu. This menu provides search options related to line items, purchase orders, selection lists, and invoices; the search results will return relevant line items.

The search entry box will display a controlled list of values via a dropdown menu when available. You will see this when searching for an org unit, owner, state, status, and provider, among others. Search is case-insensitive.

As part of transitioning the General Search interface to Angular, several changes have been made to improve the display and usability of the module:

1. Search operators that are not applicable to the search term selected will not appear in the operator drop down menu when creating a new search. Only relevant search operators will display as options.
  - For example, when searching a date based term, such as Purchase Order - Creation Time, you will see the following operator options that are relevant for dates:
    - is
    - is NOT
    - is on or BEFORE
    - is on or AFTER
    - is BETWEEN
    - age (relative date)
  - When searching a text based term, such as Line Item Attribute - Title of Work, you will see the following operator options that are relevant for text:
    - is
    - is NOT
    - contains
    - does NOT contain
    - STARTS with
    - ENDS with
2. Fields that are associated with controlled vocabularies will display the controlled values in both the search terms and filters for easy selection. These fields include:
  - line item state/status
  - line item claim policy
  - line item cancel reason
  - PO state/status
  - PO cancel reason
  - invoice receive method
  - invoice payment method

- Searches based on an organizational unit value, such as *Selection List - Org Unit* and *Purchase Order - Ordering Agency* search only the org unit selected by default and do not use inheritance in the search. If search results spanning multiple branches/systems are needed, then a broader search can be performed. The search results can be filtered using the relevant org unit column and can be adjusted in the filter to include ancestor and/or descendant org units

The screenshot shows a search filter interface. At the top, there are two column headers: 'Org Unit' and 'Creation Time' with a downward arrow. Below 'Org Unit' is a dropdown menu with a filter icon. Below 'Creation Time' is a date input field with the placeholder 'yyyy-mm-dd' and a calendar icon. A filter dropdown is open, showing the 'Operator' section with a dropdown menu set to 'Is (or includes)'. Below this are two checkboxes: '+ Ancestors' and '+ Descendants'. At the bottom of the filter dropdown are two buttons: 'Apply filter' and 'Clear filter'. In the background, a table is visible with columns 'Org Unit' and 'Creation Time'. The 'Org Unit' column has a value 'BR1'. The 'Creation Time' column has a value '02-03-2020 17:30'. There are also some partially visible values like '020 08:21', '020 05:02', and '020 10:00'.

- Dropdown menus for the search fields will retrieve a maximum of 100 rows at a time. This is especially useful for the user related search fields such as *Purchase Order - Creator*. For typeahead dropdowns, the list will continue to be refined as the user continues to type.
- Typeahead dropdowns that search for particular users, such as *Selection List Owner*, will only show users visible to you within the parameters of your assigned VIEW\_USER permissions.
- Line Item and Purchase Order searches now use the term *status* instead of *state* to indicate where the line item or purchase currently is in the acquisitions workflow.
- The search operators *Greater Than* and *Less Than* are now available in both the search fields and filter fields, in addition to *Greater Than or Equal To* and *Less Than or Equal To*.
- To search by Publication Date you would use the *Line Item Attribute - Publication Date* term. All Line Item Attribute terms are text fields. A Publication Date search can be constructed as a 4-digit year, such as 2015, and can be used with the *is on or BEFORE* and *is on or AFTER* search operators to create a more flexible search.
- Column headers for the search results can be clicked on to sort the results by the column. The columns will sort alphabetically or by other sort criteria as appropriate for the data type.
- Using the column actions to filter or sort search results will execute a new search using the current search parameters. If any un-executed changes are made to the search parameters between the initial search submission and any changes to the filters, the new search parameters will be executed upon filtering.

# Selection Lists and Purchase Orders

## Selection Lists

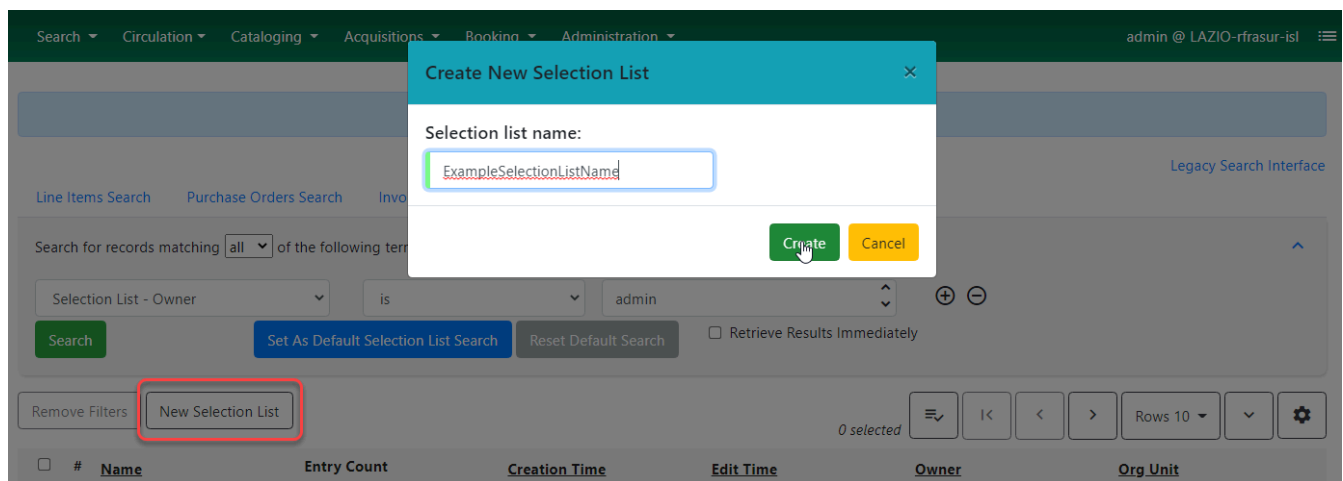
Selection lists allow you to create, manage, and save lists of items that you may want to purchase. To view your selection list, click **Acquisitions** → **Selection Lists**. This will open the Selection Lists search interface directly. You can also use the Acquisitions General Search and select the Selection Lists tab.

### Create a selection list

Selection lists can be created in four areas within the module. Selection lists can be created when you [Add Brief Records](#), [Upload MARC Order Records](#), or find records through the [MARC Federated Search](#). In each of these interfaces, you will find the Add to Selection List field. Enter the name of the selection list that you want to create in that field.

Selection lists can also be created through the Selection Lists interface:

1. From the Acquisitions menu, choose **Selection Lists**.
2. Click the **New Selection List** button.
3. Enter the name of the selection list in the box that appears.
4. Click Create.



Selection lists can also be created through the Staff Catalog:

1. In a catalog record, click the **Other Actions** button and select **View/Place Orders** from the options.
2. Click **Add to Selection List**.
3. In the box that opens, enter a selection list name in the **Save as Selection List** field.
4. Click **Save**.

The screenshot displays the 'Staff Catalog' interface. At the top, there's a 'Record Summary' for a book titled 'The cousins' by Karen M. McManus. The record includes details like Edition (First edition), TCN (386), Pubdate (2020), Database ID (386), and Bib Call # (PZ7.1.M4637 Co 2020). Below the record summary, there are several buttons: 'Patron View', 'Place Hold', 'Add Holdings', 'Serials', 'Mark For...', and 'Other Actions'. The 'Other Actions' button is highlighted with a red box, and its dropdown menu is open, showing options: 'Add To Bucket', 'Add To Carousel', 'Upload Cover Image', and 'View/Place Orders'. The 'View/Place Orders' option is also highlighted with a red box. Below the buttons, there's a table with columns: #, Location, Call Number / Part, Barcode, Shelving Location, Circulation Modifier, Age Hold Protection, Active/Create Date, Holdable?, Status, and Due Date. The table is currently empty, showing '0 selected'.

## Add items to a selection list

In addition to creating new selection lists, you can add items to an existing selection list in one of four ways: [add a brief record](#); [upload MARC order records](#); add records through a [MARC federated search](#); or use the View/Place Orders menu item in the catalog.

# Clone selection lists

Cloning selection lists enables you to copy one selection list into a new selection list. You can maintain both copies of the list, or you can delete the previous list.

- 1. From the Acquisitions Menu, choose **Selection Lists**.
- 2. Check the box adjacent to the list that you want to clone.
- 3. From the Actions Menu, choose **Clone Selected**.
- 4. Enter a name into the box that appears, and click **Clone**.

Acquisitions Search

Legacy Search Interface

Line Items Search Purchase Orders Search Invoices Search Selection Lists Search

Search for records matching 

all

 of the following terms:

Selection List - Org Unit

is

JCKSN-SEY

⊕ ⊖

Search

Set As Default Selection List Search

Reset Default Search

☒ Retrieve Results Immediately

Remove Filters

New Selection List

1 selected

⌵

⌵

⌵

⌵

Rows 100

⌵

⚙

<input type="checkbox"/>	#	Creation Time↓	Name	Entry Count		Org Unit
		Filter	Filter			Filter
<input checked="" type="checkbox"/>	1	2022-02-17 08:13	ADULTNF FEB 2022	45	<div>Clone Selected</div> <div>Delete Selected</div> <div>Merge Selected</div>	JCKSN-SEY
<input type="checkbox"/>	2	2022-02-16 15:04	RECORDEDBOOKSFEB2022	2		JCKSN-SEY



## Merge selection lists

You can merge two or more selection lists into one selection list.

1. From the Acquisitions Menu, choose **Selection Lists**.
2. Check the boxes adjacent to the selection lists that you want to merge, and click **Merge Selected**.

The screenshot shows the 'Acquisitions Search' interface. At the top, there are tabs for 'Line Items Search', 'Purchase Orders Search', 'Invoices Search', and 'Selection Lists Search'. Below these is a search bar with a dropdown menu set to 'all' and a search button. A table of selection lists is displayed with columns: #, Creation Time, Name, Entry Count, Edit Time, and Org Unit. Two rows are selected (highlighted in blue). A context menu is open over the selected rows, showing options: 'Clone Selected', 'Delete Selected', and 'Merge Selected' (which is highlighted with a red box).

#	Creation Time	Name	Entry Count	Edit Time	Org Unit
1	2022-02-17 08:13	ADULTNF FEB 2022	45	2022-02-17 08:13	JCKSN-SEY
2	2022-02-16 15:04	RECORDEDBOOKSFEB2022	2	2022-02-16 15:04	JCKSN-SEY
3	2022-02-16 09:35	LARGEPRINTFEB22	3	2022-02-16 09:35	JCKSN-SEY
4	2022-02-16 08:42	MOVIESFEB22HOLD	9	2022-02-16 08:42	JCKSN-SEY
5	2022-02-16 08:21	FICFEB22HOLD	4	2022-02-16 08:21	JCKSN-SEY
6	2022-02-14 13:18	MOVIESFIC2022	17	2022-02-14 13:18	JCKSN-SEY
7	2022-02-14 12:40	MUSICFEB22	10	2022-02-14 12:40	JCKSN-SEY
8	2022-02-14 08:58	AUDIOBOOKSFEB22	8	2022-02-14 08:58	JCKSN-SEY
9	2022-02-14 08:16	ADULTNF FEB2022 HOLDS	14	2022-02-14 08:16	JCKSN-SEY

3. Choose the **Lead Selection List** from the drop down menu. This is the list to which the items on the other list(s) will be transferred.

The screenshot shows a dialog box titled 'Merge Selection Lists'. It has a close button (X) in the top right corner. Below the title, it says 'Lead Selection List:'. A dropdown menu is open, showing a list of selection lists. The first option, 'MOVIESFIC2022', is highlighted in blue. Below the dropdown, there is a list of selection lists: 'MOVIESFEB22HOLD' and 'MOVIESFIC2022'. At the bottom right of the dialog box, there are two buttons: 'Merge' (green) and 'Cancel' (yellow).

4. Select **Merge**.

## Delete selection lists

You can delete selection lists that you do not want to save. You will not be able to retrieve these items through the General Search after you have deleted the list. You must delete all line items from a selection list before you can delete the list. Selection lists with line items that have been ordered may not be deleted.

1. From Acquisitions Menu, choose Selection Lists.
2. Check the box adjacent to the selection list(s) that you want to delete.
3. Click Delete Selected.

## Mark Ready for Selector

After an item has been added to a selection list or purchase order, you can mark it “ready for selector”. This step is optional but may be useful to individual workflows.

1. If you want to mark part of a selection list “ready for selector”, then you can check the box(es) of the line item(s) that you wish to mark “ready for selector”. If you want to mark the entire list “ready for selector”, then skip to step 2.
2. Click Actions → Mark “Ready for Selector”.
3. A pop up box will appear. Choose to mark the selected line items or all line items.
4. Click Go.
5. The screen will refresh. The marked line item(s) will be highlighted pink, and the status changes to selector-ready.

Open in New Window Refresh

Selection list **Training\_List**  
 Create date: 2/17/22  
 Last updated: 2/17/22  
 Selector: admin  
 Entry Count: 3

--Actions--  
 --Actions--  
 Move Items to Selection List  
**Mark Ready for Selector**  
 Mark Ready for Order  
 Delete Selected Items  
 Add Brief Record  
 Export Single Attribute List  
 ----PO----  
 Create Purchase Order  
 Add to Purchase Order  
 Print Purchase Order  
 View PO History  
 Load Bibs and Items  
 Cancel Selected Line Items  
 Apply Claim Policy to Selected Line Items  
 Mark Selected Line Items as Received  
 Un-Receive Selected Line Items  
 Create Invoice From Selected Line Items  
 Link Selected Line Items to Invoice

Collection Code	Fund	Circ Modifier	Distribution Formula		Expand All	Items	Notes	Actions	Status	Estimated Price
<a href="#">Fox.</a>										
00 native-evergreen-catalog										
125400					<a href="#">Expand</a>	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	-- Actions --	Selector-Ready	
<a href="#">sts</a>										
0643 First edition. native-evergreen-catalog										
540643					<a href="#">Expand</a>	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	-- Actions --	New	
<a href="#">sts</a>										
<a href="#">Charlie Jane Anders.</a>										
Anders, Charlie Jane. 9781250317315 First edition. native-evergreen-catalog										
Order Identifier ISBN 9781250317315					<a href="#">Expand</a>	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	-- Actions --	New	

# 5 | 0 | catalog worksheet requests

## Convert selection list to purchase order

Use the Actions menu to convert a selection list to a purchase order.

1. In a selection list, select **Create Purchase Order** from the Action menu.
2. A pop up box will appear.
3. Select the **ordering agency** from the drop down menu.
4. Enter the **Provider**.
5. Check the box adjacent to prepayment required if prepayment is required.
6. Choose if you will add **All Lineitems** or **Selected Lineitems** to your purchase order.
7. Check the box if you want to **Import Bibs and Create Copies** in the catalog.
8. Click **Submit**.

## Purchase Orders

Purchase Orders allow you to keep track of orders and, if EDI is enabled, communicate with your provider. To access purchase orders, select “Purchase Orders” or the Purchase Order tab from General Search in the Acquisitions menu.

### Naming your purchase order

When creating a purchase order or editing an existing purchase order, the purchase order name must be unique for the ordering agency. If a PO name is not added at the time of PO creation, Evergreen will assign the PO ID as the name. This can be edited later, if desired.

Evergreen will display a warning dialog to users, if they attempt to create or edit purchase order names that match the names of already existing purchase orders at the same ordering agency. The Duplicate Purchase Order Name Warning Dialog includes a link that will open the matching purchase order in a new tab.

Purchase Order Names are case sensitive.

### Duplicate PO Name Detection When Creating a New Purchase Order

When a duplicate purchase order name is detected during the creation of a new purchase order, the user may:

- Click **View PO** to view the purchase order with the matching name. The purchase order will open in a new tab.
- Click **Cancel** to cancel the creation of the new purchase order.
- Within the Name (optional) field, enter a different, unique name for the new purchase order.

If the purchase order name is unique for the ordering agency, the user will continue filling in the remaining fields and select **Save** when finished.

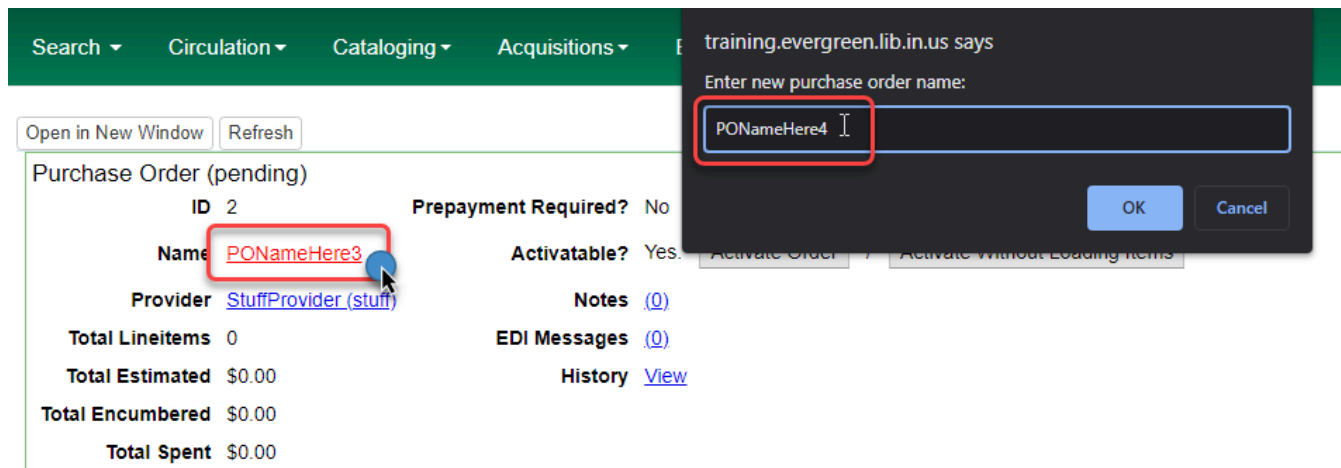
If the purchase order name is not unique for the ordering agency, the Save button will remain grayed out to the user until the purchase order is given a unique name.

Ordering Agency	LAZIO
Name (optional)	PONameHere
This name is already in use by another PO <a href="#">View PO</a>	
Provider	
Prepayment Required	<input type="checkbox"/>
Cancel	Save

## Editing the Name of an Existing Purchase Order

To change the name of an existing purchase order:

1. Within the purchase order, the Name of the purchase order is a link (located at the top left-hand side of the purchase order). Click the **PO Name**.
2. A new window will open, where users can rename the purchase order.
3. Enter the new purchase order name.
4. Click **OK**.



If the new purchase order name is unique for the ordering agency, the purchase order will be updated to reflect the new name. If the purchase order name is not unique for the ordering agency, the purchase order will not be updated with the new name. Instead, the user will see the **Duplicate Purchase Order Name Warning Dialog** within the purchase order.

When a duplicate purchase order name is detected during the renaming of an existing purchase order, the user may:

- Click **View PO** to view the purchase order with the matching name. The purchase order will open in a new tab.
- Repeat the steps to change the name of an existing purchase order and make the name unique.

## Activate purchase order

### Activation Criteria

- **Copy** - Each line must have at least one copy attached to it.
  - Add a copy to a pending PO or Selection List line item by using the Batch Updater or Copies link.
    - Add copies using the Batch Updater by entering the total number of copies in the Copies field. Check the box(es) beside the line item(s) to which additional copies are warranted, and then select “Apply to Selected.”
    - Add copies to a single line item by selecting the Copies(0) link on the appropriate line item. This will open the Copies interface and enable the user to enter the number of copies to order into the Item Count. Select “Go” and a line will be created for each copy.
      - The gray box is a batch update function allowing updates for multiple copies. Enter appropriate information as a batch update or for individual copies.
      - Once all desired information has been entered, Save Changes to update line item copies.
- **Owning Branch** - Each line item must have an Owning Branch
- **Copy Location** - shelving location
- **Fund** - Each line item must have a fund applied to it.
  - Stop Level - Fund(s) used for a purchase order must not have reached its stop level. If the fund is above its stop level the “Activate Order?” field will read, *No; fund [fund name here] would be encumbered beyond its stop level.* In this case, more credit must be allocated to the fund or a different fund must be applied to line items in the PO.
  - Warning Level - When fund(s) used for the PO have reached the warning level, staff will be alerted but are able to continue with activating the PO.
- **Price** - Each line item must contain an estimated price.
- **Optional attributes** - these CAN be assigned prior to activation or can be left unset.
  - Circ Modifier (optional prior to activation)
  - Call Number - temporarily assigned automatically when items are loaded at activation
  - Barcode - temporarily assigned automatically when items are loaded at activation

### Completing PO Activation

When all activation criteria have been met, the **Activate Order** button will be enabled. Selecting the **Activate Order** button will trigger the following:

- The funds associated with the purchases will be encumbered.
- Bibliographic records and copies will be imported into the catalog, if not previously imported.
  - The record import interface will appear for those records that are not already in the catalog. Once the appropriate parameters have been entered in the import interface and the import has been initiated, the progress screen will appear. This progress screen consists of a progress bar in the foreground, and a tally of the following in the background of the bottom-left corner.
    - Lineitems processed
    - Vandelay Records processed
    - Bib Records Merged/Imported
    - ACQ Copies Processed
    - Debits Encumbered
    - Real Copies Processed

# Line Items

Line items represent bibliographic records on a selection list or purchase order.

## Line Item Attributes

Line item attributes are characteristics of the bibliographic record, such as ISBN or Title. Line items also contain copy information, price information, notes, alerts, links to additional interfaces, and actions.



### 1. Title & Publishing information

Title and publishing information from the bibliographic record. If there is cover art, it will be displayed.

- Click on the title to view the MARC record for this line item.

### 2. Order Identifier

Line items that are created from existing MARC records may have multiple ISBNs, ISSNs, or UPCs attached to the record depending on the type of item. Users are able to specify which standard identifier to display in the purchase order sent to providers. Users can also add new identifiers as needed. This function helps to ensure that the correct edition of an item is ordered.

- From the drop down menu choose the appropriate standard identifier; or, highlight the existing identifier and type in or paste your new identifier.

### 3. Line Item ID

A unique system generated ID# which can be used to search for and retrieve line items.

### 4. Count of existing copies

This count displays in line items for selection lists and purchase orders. The count of existing catalog copies refers to the number of copies owned at the ordering agency and/or the ordering agency's child organization units (ie. branches of a multi-branch library system).

- The counts display for line items that have a direct link to a catalog record. Generally, this includes line items created as "on order" based on an existing catalog record.
  - If the existing copy count is greater than zero, the count will display as bold red.
  - If no existing copies are found, a "0" (zero) will display in plain text.
- The count of existing copies does not include copies that are in either a Lost or Missing status.

## 5. Link to Catalog/Catalog Link

- If a line item is already linked to a bibliographic record in the catalog, a **Catalog** link will appear here. Click on this link to view the catalog record.
- If a line item is not linked to a bibliographic record in the catalog, a **Link to Catalog** link will appear here.

Line Items		Expand All	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>	<b>the kobalt dossier</b> 9781250751218	Expand	Copies(1)	Notes(0)	-- Actions --	Pending-Order	10
	Order Identifier ISBN 9781250751218 # 12   0   <a href="#">catalog</a>   <a href="#">worksheet</a>   <a href="#">SLonaSundayAfternoon</a>   <a href="#">requests</a>   <a href="#">view invoice(s)</a>						
<input type="checkbox"/>	<b>Ten Beautiful Things</b> Griffin	Expand	Copies(1)	Notes(0)	-- Actions --	New	
	Order Identifier ISBN # 13   0   <a href="#">link to catalog</a>   <a href="#">worksheet</a>   <a href="#">requests</a>   <a href="#">view invoice(s)</a>						

- Click on “link to catalog” to open a catalog search. The catalog search field will be populated with existing information from the line item, but can be modified to include more or higher quality information.

title:Ten Beautiful Things author:Griffin	Search
-------------------------------------------	--------

[View MARC](#) [Select](#)



LDR01742cam a2200445 i 4500		Hide
001	439	
003	EI-TR	
005	20210715212458.0	
008	190424s2021 maua b 000 1 eng c	
010	1a 2019014524	
020	1a 9781580899369 1q (hardcover)	
020	1a 1580899366 1q (hardcover)	
035	1a (DLC)BK0026206052	
035	1a (OCoLC)on1228810354	
037	1b Random House Distribution childrens, 400 Hahn rd, Westminster, MD, USA, 21157, (212)7828741 1n SAN 201-3975	
040	1a NJQ/DLC 1b eng 1e rda 1c NJQ 1d DLC	
050	0 1a PZ7.G8813593 1b Te 2021	
082	0 4 1a [E] 12 23	
092	1a E	
100	1 1a Griffin, Molly Beth, 1e author. 10 (DLC)857037	
245	1 0 1a Ten beautiful things / 1c Molly Beth Griffin ; illustrated by Maribel Lechuga.	
246	3 1A 10 beautiful things	
264	1 1a Watertown, Massachusetts : 1b Charlesbridge, 1c [2021]	
264	4 1c ©2021	
300	1 1a 1 volume (unpaged) : 1b color illustrations ; 1c 23 cm	
336	1a text 1b txt 12 rdacontent	

- When search criteria has been satisfactorily added, click Search.
- **View MARC** and **Select** options will appear when the search has been completed.
- When the appropriate MARC record has been found, choose **Select** to update MARC information for the line item, and return to the originating selection list or purchase order.
  - **IMPORTANT** - Only the linked bibliographic/catalog record will be updated through this action. Make sure to update the order identifier by copying from the newly linked MARC and pasting into the Order Identifier field to ensure correct ordering.

## 6. Worksheet

The line item worksheet can be used to track the progress of a particular line item through the acquisitions process.

- Click the worksheet link to view this information.
- The worksheet can be printed using CTRL+P.
- Click **RETURN** to return to the originating selection list or purchase order.

## 7. Requests

Patrons may wish to place a request for purchase. This link opens the Acquisition Patron Requests management interface. Patron requests for a specific line item can be viewed and managed from this interface.

## 8. Invoice

Link to invoice(s) associated with line item.

## 9. Queue

Line to Acquisitions queue used for upload of bibliographic records.

## 10. Line Item detailed view

The detailed view of a line item includes ordering library (branch), temporary barcode and call number, fund, copy(shelving) location, circulation modifier, collection code, and any notes that have been added to a line item.

- Click Expand on a line item to display the detailed view for a specific line item.
- Click Expand All to display the detailed view for all line items
- Clicking Expand or Expand All a second time will close the detailed view.

The screenshot displays the 'Line Items' section of a system. At the top, there is a header with 'Line Items' and an 'Expand All' button. Below this, two line items are listed. Each item has a checkbox, a title, a description, an 'Order Identifier' dropdown, an 'ISBN' dropdown, an 'Expand' button, 'Copies(1)' and 'Notes(0)' links, an 'Actions' dropdown, and an 'On-Order' status with a price field.

**Line Item 1:**

- Checkbox: ☐
- Title: [Rebel daughter / Lori Banov Kaufmann.](#)
- Description: Kaufmann, Lori Banov 9780593125816 First edition. native-evergreen-catalog
- Order Identifier:
- ISBN:
- Expand: [Expand](#)
- Copies(1): [Copies\(1\)](#)
- Notes(0): [Notes\(0\)](#)
- Actions: [-- Actions --](#)
- On-Order:

**Line Item 2:**

- Checkbox: ☐
- Title: [Pumpkin / Julie Murphy.](#)
- Description: Murphy, Julie 2020952898 First edition. native-evergreen-catalog
- Order Identifier:
- ISBN:
- Expand: [Expand](#)
- Copies(1): [Copies\(1\)](#)
- Notes(0): [Notes\(0\)](#)
- Actions: [-- Actions --](#)
- On-Order:

Below each line item is a table with the following columns: Branch, Barcode, Call Number, Fund, Copy Location, Circ Modifier, Collection Code, and Note.

**Line Item 1 Table:**

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
LAZIO	ACQ4	ACQ4	TF (2022)	Stacks	book		

**Line Item 2 Table:**

Branch	Barcode	Call Number	Fund	Copy Location	Circ Modifier	Collection Code	Note
LAZIO	ACQ5	ACQ5	TF (2022)	Stacks	book		

## 11. Copies

Includes the number of copies currently added to the purchase order or selection list. Use this link to add copy information to a line item and add/remove copies to be ordered.

## 12. Notes

Use the Notes link to add/edit notes or alerts to a line item. Notes can be made visible to the vendor if desired. Notes will appear in the detailed view, on worksheets, and in other places. More information is available in the Line Item Notes section and the Line Item Alerts section.

## 13. Actions

Use the Actions link to perform specific actions on a line item. More information is found in the [Line Item Actions section](#).

## 14. Status

Shows the status of a particular line item. More information is found in the [Line Item Statuses section](#).

## 15. Estimated Price

A purchase order will not activate without an Estimated Price for each line item. The amount entered into Estimated Price is the amount that will be encumbered for the item. It is also the amount that will appear in the price field of generated invoices.



## Line Item Actions

The line items actions menu provides you with a number of functions that can be applied to a particular line item. These actions can generally be performed at various points after a line item has been created, added to a purchase order, and/or activated.

<a href="#">Expand All</a>	Items	Notes	Actions	Status	Estimated Price
<a href="#">Expand</a>	<a href="#">Copies(3)</a>	<a href="#">Notes(0)</a>	-- Actions -- -- Actions -- Update Barcodes Holdings Maint. Claims (2 existing) View History	On-Order	15
<a href="#">Expand</a>	<a href="#">Copies(1)</a>	<a href="#">Notes(0)</a>		On-Order	20

### Update Barcode

After a purchase order has been activated, Selecting Update Barcode will open the Holdings Editor where further item/copy editing can be done including Call Number, barcode, parts and other holdings attributes. In most cases, most of this work will not be done until an item is actually received, but workflows vary.

### Holdings Maintenance

After an item is received, use the Line Item Actions menu to go directly to the Holdings view in the staff catalog. From here, additional actions can be performed.

### Claims

When an item is ordered but does not arrive or arrives in an unacceptable state, a claim must be made.

1. From the Line Item Actions menu, select **Claims ([#] existing)**. A dialog box with each copy in the line item will open.
2. Check the boxes adjacent to the copies to be claimed as well as the Claim Action to be applied, then click **Claim Selected**. A new dialog box will open.
3. From the drop down, select the appropriate Claim type and any additional notation, and click **Claim**.
4. Claim vouchers for the claimed items will appear.
5. Click **Print** to save or print your vouchers.  
The voucher can be mailed or emailed to the provider to initiate the claim.
6. The number of existing claims on the line item will update.

### View History

Select View History from the Line Item Actions Menu to see a log of changes made to the line item. By default, the newest changes appear first. Use column headers to sort by different criteria.

## Line Item Notes

Notes on line items can include any additional information that you wish to add to the line item. Notes can be internal or can be made available to providers. Notes also display on the Line Item Worksheet for the item. Line Item Notes can be applied to more than one line item using the Batch Updater. A counter in the Notes link will update to display the number of alerts and notes for that line item.

## Line Item Alerts

Alerts are pop up messages that appear when an item is received. Alerts also appear on the Line Item Worksheet for the item. To add an alert:

1. Click **Notes([#])** and then **New Alert**.

The screenshot shows a table with columns: Line Items, Expand All, Items, Notes, Actions, Status, and Estimated Price. The first row contains details for 'Blue : a novel / Danielle Steel'. The 'Notes' column shows 'Notes(0)', which is highlighted with an orange box. Below the table are links for '# 18 | 1 | catalog | worksheet | requests | view invoice(s)'.

2. Close an alert code from the drop down menu. These Line Item Alert codes are created by your Acquisitions Administrator.
3. Add additional comments (optional).
4. Click **Create**. The alert will display on the screen.

The 'New Alert' dialog box is shown. It has a 'Choose alert code' dropdown menu with 'Patron Request' selected. Below it is a text area for 'Additional comments' containing 'Please put on rush cataloguing shelf.' A 'Create' button is at the bottom left.

5. Click **Return** to go back to the selection list or purchase order.

The screenshot shows the 'Return' button highlighted with an orange box. Below the table, a list of alerts is displayed. The first alert is '[MPL] Patron Request' with the comment 'Please put on rush cataloguing shelf.' and a timestamp '11/4/19 5:40 PM' and a 'Delete' link.

6. A red flag will now appear to the right of the Notes link and the counter will be updated to include the total number of alerts and notes for the line item.

The screenshot shows the 'Notes' column now displays 'Notes(1)' with a red flag icon to its right, indicating one alert has been added. The 'Notes' link is highlighted with an orange box.

## Line item statuses

The purchase order and selection list interfaces keep track of various states that your line items might be in. The line item bar changes color depending on the status of the line item. The colors that display may vary depending on your screen resolution and settings. Some statuses are set automatically and others must be set manually. Changes caused by actions to a line item will propagate between purchase orders and selection lists.

- **new (off-white)** - *automatic*: Item is newly added to the acquisitions process.  
Status is assigned when an item is newly added to either purchase order or selection list and has been added to neither one previously.
- **selector-ready (light pink)** - *manual*: Item has been chosen and is waiting for a selector to approve.  
When an item has been added to a selection list, a user may choose to mark a line item as selector-ready to determine number of copies and locations.
- **order-ready (periwinkle)** - *manual*: Item is ready to be ordered.  
In libraries where there are separate selectors from those who place orders, a selector can mark a line item as order-ready when the number of copies and locations have been established.
- **pending-order (gray)** - *automatic*: Item is part of a purchase order that has not yet been activated.  
Once all necessary activation criteria have been met for a purchase order, line items will be given a status of pending-order.
- **on-order (pink)** - *automatic*: Item is currently on-order.  
When a purchase order is activated, line items in that PO will be given the status of on-order.
- **received (gray blue)** - *manual*: Item has been received by the library and marked as such in the PO.
- **received and paid (gray blue with red “Paid” label)** - *automatic*: Item has been received by the library and the invoice has been closed.
- **canceled (white)** - *manual*: Item has been canceled.
- **delayed (blue)** - *manual*: Item has been canceled but debits remain since the item is only delayed at this point.

*Note* - While there is some overlap in naming, line item statuses and item statuses are not the same thing.

## Delete a line item

Line items with the status of new, selector-ready, order-ready, or pending-order can be deleted. Please note that there is no warning message when deleting a line item and the deletion cannot be undone. Also, if copies for line items were created prior to activating a purchase order, those items will need to be deleted from the catalog before deleting the line item.

Line items with the status of On-order cannot be deleted.

To delete a line item:

1. Check the box(es) of the line item(s) to be deleted.
2. From the main Actions menu, select **Delete Selected Items**.
3. The line item and its associated history will disappear.

# Receiving Items

You can receive or un-receive entire purchase orders, individual line items or specific copies. Items can be marked as received before or after they are invoiced.

## Receive Purchase Order

You can receive purchase orders that have a status of *on-order* or *delayed:[reason]*. You can un-receive purchase orders that have a status of received.

In the event that all items on a purchase order arrive together you are able to receive the entire purchase order at once.

### Receive a purchase order:

1. Open a purchase order.
2. Check the checkbox to select all items on the purchase order.
3. From the main Actions menu, select **Mark Selected Line Items as Received**.
4. Any alerts for the line items will pop up. Click **OK** to acknowledge the alerts and receive the items.
5. The line items will change to a gray blue color and the Status for each will update to *received*.

### Un-receive a purchase order:

1. Open a purchase order.
2. Check the checkbox to select all items on the purchase order.
3. From the main Actions menu, select **Un-receive Selected Line Items**.
4. A pop-up will appear asking you to confirm the actions. Click **OK**.
5. The line items on the purchase order will change to a pink color and the status will update to *on-order*.
  - a. If the purchase order is received in the future, it will behave in the same manner as a purchase order that is being received for the first time.

## Receive Line Items

You can receive line items that have a status of *on-order* or *delayed:[reason]*. You can un-receive line items that have a status of *received*.

### Receive a Line Item

1. Open a purchase order.
2. Check the check box(es) of the line item(s) you wish to receive.
3. From the main Actions menu, select **Mark Selected Line Items as Received**.
4. Any alerts on the line item(s) will pop up. Click **OK** to acknowledge the alert(s) and receive the items(s).
5. The line item(s) will change to a gray blue color and the status will update to *received*.

### Un-receive a Line Item

1. Open a purchase order.
2. Check the checkbox(es) of the line item(s) you wish to un-receive.
3. From the main Actions menu, select **Un-receive Selected Line Items**.
4. A pop-up will appear asking you to confirm the action. Click **OK**.
5. The line item(s) will change to a pink color and the status will update to *on-order*.
  - a. If the line item is received in the future, it will behave in the same manner as a line item that is being received for the first time.

## Receive Copies

You can receive copies that have a status of *on-order* or *delayed:[reason]*. You can un-receive copies that have a status of received.

### Receive a Specific Copy

1. Open a purchase order.
2. Click the **Copies** link on the line item for the copy or copies you wish to receive.
3. Click **Mark Received** adjacent to the copy you wish to receive.
4. Any alerts associated with the line item will pop up. Click **OK** to acknowledge the alert and receive the copy.
  - a. The alerts associated with a particular line item will appear each time a copy on that line item is received.
5. Click **Return** to return to the purchase order.
  - a. The line item will only change to a gray blue color and update the status to received when all copies associated with the line item have been received. Otherwise the line item will continue to display based on its *on-order* or *delayed:[reason]* status.

### Un-receive a Specific Copy

1. Open a purchase order.
2. Click the **Copies** link on the line item for the copy or copies you wish to un-receive.
3. Click **Un-receive** adjacent to the copy you wish to un-receive.
4. Click **OK**.
5. Click **Return** to return to the originating purchase order.
6. The line item will be pink and the Status will show as *on-order*.
  - a. If the copy is received in the future, it will behave in the same manner as a copy that is being received for the first time.

## Receive Items on the Invoice

To receive line items directly from the invoice rather than through a purchase order:

1. Create or open an invoice.
2. Link all applicable line items to the invoice.
3. Save.
4. Select Receive Items. The Acquisition Invoice Receiving screen opens.
5. Select the number of copies you would like to receive for each line item on the invoice.
6. Click **Receive Selected Copies**.
7. Click **Return to Invoice**.

Alternatively, receive items specific copies directly from an invoice using **List Mode** by:

1. Create or open an invoice.
2. Click **Receive Items**.
3. Click **Use List Mode**.
  - a. Line item details including Fund, Call Number, and Barcode will be displayed.
4. Use the checkboxes adjacent to specific copies to select those to be received.
5. Click **Receive Selected Copies**.
6. Select more copies to receive or click **Return to Invoice**.

*Note - Fund debits linked to an invoice are marked as paid only when the invoice is closed.*

## Brief Records

Brief records are short bibliographic records with minimal information often used as placeholder records until items are received. Brief records can be added to new or existing selection lists as well as new, pending or on-order purchase orders and can be imported into the catalog. When a brief record is created, a line item is created in either a purchase order or selection list. From here, more actions can be taken.

### Add brief records to a selection list

1. From the main Acquisitions menu, select **New Brief Record**.
  - a. A new brief record can also be added from within a selection list by choosing **Add Brief Record** from the main Actions menu in that list.
2. Choose a selection list from the drop down menu, or enter the name of a new selection list.
3. Enter bibliographic information in the desired fields.
4. **Save Record**.

**New Brief Record**

Add To Selection List	Business Reference ▼
Title of work	Business Grammar, Style & Usage
Author of work	Abell, Alicia
Language of work	
Pagination	
ISBN	9781587620263
ISSN	
Price	
Identifier	
Publisher	
Publication Date	2003
Edition	
UPC	

### Add brief records to purchase orders

You can add brief records to new or existing purchase orders.

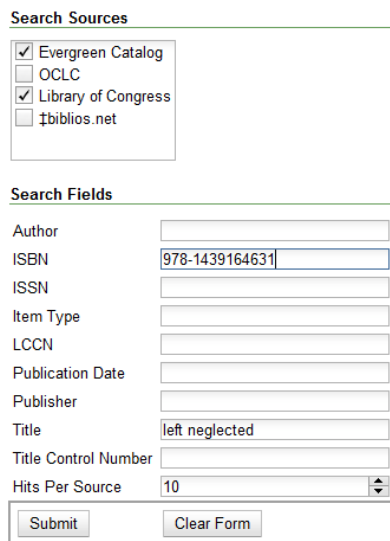
1. Open or [create a purchase order](#).
2. From the Actions menu, select Add Brief Record.
3. Enter bibliographic information in the desired fields.
4. **Save Record**.



# MARC Federated Search

The MARC Federated Search enables you to import bibliographic records into a selection list or purchase order from a z39.50 source.

1. From the main Acquisitions menu, select **MARC Federated Search**.
2. Check the boxes of z39.50 services that you want to search. The local Evergreen catalog is checked by default.
3. Enter search criteria and click **Submit**.



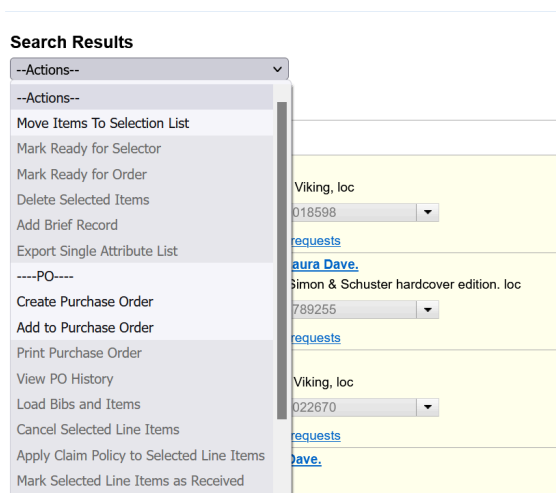
**Search Sources**

☒ Evergreen Catalog  
☐ OCLC  
☒ Library of Congress  
☐ \$biblios.net

**Search Fields**

Author   
ISBN   
ISSN   
Item Type   
LCCN   
Publication Date   
Publisher   
Title   
Title Control Number   
Hits Per Source

4. A list of results will appear. Click the **Copies** link to add copy information to the line item.
5. Click the **Notes** link to add notes or line item alerts to the line item.
6. Enter a price in the **Estimated Price** field.
7. Save the line item(s) to a selection list by checking the box on the line item and selecting **Move Items to Selection List** from the main Actions menu. A purchase order can also be created or added to by selecting the line item(s) and then choosing **Create Purchase Order** or **Add to Purchase Order** from the main Actions menu.



**Search Results**

--Actions--

--Actions--  
Move Items To Selection List  
Mark Ready for Selector  
Mark Ready for Order  
Delete Selected Items  
Add Brief Record  
Export Single Attribute List  
----PO----  
Create Purchase Order  
Add to Purchase Order  
Print Purchase Order  
View PO History  
Load Bibs and Items  
Cancel Selected Line Items  
Apply Claim Policy to Selected Line Items  
Mark Selected Line Items as Received

Viking, loc	018598	requests
aura Dave.		
Simon & Schuster hardcover edition, loc	789255	requests
Viking, loc	022670	requests
Dave.		

*Note - This interface is functional but antiquated. It may be preferable for users wishing to import via z39.50 to do so using the z39.50 import tool along with the Place Order feature in the staff catalog until this interface is modernized.*

# Load MARC Order Records

The Acquisitions Load MARC Order Record interface enables users to upload records to the Evergreen catalog and create line items in selection lists and purchase orders. You can both create and activate purchase orders in one step from this interface as well as load bibliographic records and items into the catalog.

Leveraging the match sets available in the cataloging MARC Batch Import Tool, you can also utilize record matching mechanisms to prevent the creation of duplicate records.

## Basic Upload Options

1. From the Acquisitions menu, select **Load MARC Order Records**.
2. To upload MARC records for a new purchase order, check **Create Purchase Order**.
3. To activate the purchase order at the time of creation, check **Activate Purchase Order**.
4. Enter the name of the **Provider** (vendor). This field is an auto-complete field based on providers set up by an Acquisitions Administrator.
5. Select the appropriate **Context Org Unit**.
  - a. The context org unit is the library system or branch responsible for placing and managing the order.
  - b. The context org unit defines what org unit settings (eg. copy locations) should be available, what fiscal year to use, who is allowed to view/modify the PO, where the items should be delivered and the EDI SAN.
    - i. In the case of a multi-branch system uploading records for multiple branches, choosing the system is recommended.
    - ii. Single branch libraries or branches responsible for their own orders should select their branch as their org unit.
6. To add the records to a **selection list**, select a list from the dropdown menu or type in the name of a selection list to create a new one.
7. Select a **Fiscal Year** from the dropdown menu that matches the fiscal year of the funds that will be used for the order.
  - a. If no fiscal year is selected, the system will use the library's default fiscal year.
  - b. If no default fiscal year is set, the system will default to the current calendar year.

Upload	
Create Purchase Order	<input checked="" type="checkbox"/>
Activate Purchase Order	<input type="checkbox"/>
Provider	<input type="text" value="stuff"/>
Context Org Unit	<input type="text" value="NEAPOLITAN"/>
Add to Selection List	<input type="text" value="SLonaSundayAfternoon"/>
Fiscal Year	<input type="text" value="2022"/>
<hr/>	
Upload to Queue	<input type="text"/>
Record Match Set	<input type="text"/>
Merge Profile	<input type="text"/>
Import Non-Matching Records	<input type="checkbox"/>
Merge On Exact Match (901c)	<input type="checkbox"/>
Merge On Single Match	<input type="checkbox"/>
Merge On Best Match	<input type="checkbox"/>
Best/Single Match Minimum Quality Ratio	<input type="text" value="0.0"/> New Record Quality / Quality of Best Match
Insufficient Quality Fall-Through Profile	<input type="text"/>
Load Items for Imported Records	<input type="checkbox"/>

## Record Matching Options

Use the options below the horizontal rule for the system to check for matching records before importing an order record.

1. Create a queue to which records will be uploaded or add records to an existing queue by selecting from that dropdown.
2. Select a **Record Match Set** from the dropdown menu.
3. Select a **Merge Profile**. Merge profiles enable you to specify which MARC tags should be removed or preserved for incoming records.
4. Select a **Record Source** from the dropdown menu.
5. To automatically import records when uploaded, select one or more of the following options:
  - a. **Import Non-Matching Records** - Import any records that don't match existing records in the catalog.
  - b. **Merge on Exact Match (901c)** - use only for records that will match on the 901c field (TCN).
  - c. **Merge on Single Match** - import records that only have one match in the catalog.
  - d. **Merge on Best Match** - if more than one match is found in the catalog for a given record, Evergreen will attempt to perform the best match as defined by the match score.
6. To only import records that have a quality equal to or greater than the existing record, enter a **Best/Single Match Minimum Quality Ratio**. Divide the incoming record quality score, as determined by the match set's quality metrics, by the record quality score of the best match that exists in the catalog. If you want to ensure that the inbound record is only imported when it has a higher quality than the best match, then you must enter a ratio that is higher than 1, such as 1.1. If you want to bypass all quality restraints, enter a 0 (zero) in this field.
7. Select an **Insufficient Quality Fall-Through Profile** if desired. This field enables you to indicate that if the inbound record does not meet the configured quality standards, then you may still import the record using an alternate merge profile. This field is typically used for selecting a merge profile that allows the user to import holdings attached to a lower quality record without replacing the existing (target) record with the incoming record. This field is optional.
8. If your order records contain holdings information, by default, Evergreen will load them as acquisitions copies. These can be overlaid with real copies during the MARC batch importing process or you can select **Load Items for Imported Records** to load them as live copies that display in the catalog.

## Default Upload Settings

Default upload values can be set in the **Library Settings Editor** on the **Local Administration Page**. These settings are:

- Upload Activate PO - *true/false/unset*
- Upload Create PO - *true/false/unset*
- Upload Default Insufficient Quality Fall-thru Profile - *select from merge profiles*
- Upload Default Match Set - *select from match sets*
- Upload Default Merge Profiles- *select from merge profiles*
- Upload Default Min. Quality Ratio - *number*
- Upload Default Provider - *select from providers*
- Upload Import Non Matching by Default - *true/false/unset*
- Upload Load Items for Imported Records by Default - *true/false/unset*
- Upload Merge on Best Match by Default - *true/false/unset*
- Upload Merge on Exact Match by Default - *true/false/unset*
- Upload Merge on Single Match by Default - *true/false/unset*

Organization Unit Settings				Context Location	SFINCIONE	upload	Filter	Clear Filter	Export	Import
* Indicates the setting is not inherited from the parent org unit at run time										
Edit	History	Group	Setting	Context		Value				
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Activate PO							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Create PO							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Default Insufficient Quality Fall-Thru Profile							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Default Match Set							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Default Merge Profile							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Default Min. Quality Ratio							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Default Provider							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Import Non Matching by Default							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Load Items for Imported Records by Default							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Merge on Best Match by Default							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Merge on Exact Match by Default							
<a href="#">Edit</a>	<a href="#">History</a>	Acquisitions	Upload Merge on Single Match by Default							

## Sticky Settings

If the above default settings are not implemented, the selections/values used in the following fields will be sticky and will automatically populate the fields the next time the **Load MARC Order Records** interface is opened.

- Create Purchase Order
- Activate Purchase Order
- Context Org Unit
- Record Match Set
- Merge Profile
- Import Non-Matching Records
- Merge on Exact Match (901c)
- Merge on Single Match
- Merge on Best Match
- Best/Single Match Minimum Quality Ratio
- Insufficient Quality Fall-Through Profile
- Load Items for Imported Records

*Note - Sticky settings can be impacted by browser updates, cache clearing, and hard refresh/reload.*

## Use Cases for MARC Order Upload Form

With the MARC Order Upload Form, you can add items to a selection list or purchase order and ignore the record matching options, or you can use both acquisitions and cataloging functions. View the [Evergreen Acquisitions Documentation here](#) for detailed examples for various scenarios.

# Invoices

Invoices can be created for purchase orders, individual line items, and blanket purchases, as well as creating blank invoices to which charges can be added. Libraries using EDI can have electronic invoices sent. If desired, invoices can be created for items before those items have been received. Closed invoices can also be reopened to make adjustments.

## Invoice Details

The Invoice Details must be completed for every invoice created.

### Invoice Details fields

- Vendor Invoice ID (required)
  - This number will be listed on the paper invoice sent by the provider.
- Receive Method (required)
  - Paper (default) or EDI
- Provider and Shipper (required)
  - These fields will auto-complete.
- Note (optional)
- Payment Method
  - Available payment methods display in a dropdown menu. Additional invoice payment methods may be created by Local Acquisitions Administrators.
- Invoice Date (required)
  - By default, the date on which the invoice is created. The date can be changed by clicking the field and selecting a new date using the calendar widget.
- Invoice Type
  - Used if a library distinguishes between types of invoices. This is a free text field.
- Payment Authorization
  - Used if a library requires authorization for payments. This is a free text field.
- Receiver (required)
  - This field defaults to the workstation location being used. If necessary, the receiver can be changed by selecting from the dropdown menu.

*NOTE - The Invoice Details automatically hides once completed. The Invoice Details can be shown at any time by clicking Show Details.*

## Line Item Details

- Title
- Author
- ISBN
- summary of copies ordered, received, invoiced, claimed, and canceled/delayed
  - The **# Invoiced** and the **# Billed fields** will have auto-populated with the number of copies available to be invoiced for the line item.
  - These fields can be updated as needed.
- summary of amounts estimated, encumbered, and paid
  - Enter the amount billed into the **Billed** field. The **Paid** field will auto-fill to match.
- line item ID number
- link to Selection List (if used)
- link to Purchase Order

## Required Fields to save Invoice

1. Vendor Invoice ID
2. Provider
3. Shipper
4. Payment Method
5. # Invoiced
6. # Paid

## Invoice Save Options

- Click **Save** to save the changes made and keep the invoice open.
- Click **Save and Clear** to save the invoice and open a blank invoice.

## Creating invoices and adding line items

Specific line items can be added to an invoice from a purchase order. Line items to be added can also be searched from within the invoice interface.

### Creating a blank invoice

Create a blank invoice for purchases that are not attached to a purchase order.

1. From the main Acquisitions menu, select **Create Invoice**.
2. Fill in the top section of the invoice. See the [Invoice Details](#) section for more information.
3. **Save**.

### Adding line items from a Purchase Order

All or some line items from one or more purchase orders can be added to an invoice.

#### Link an Entire Purchase Order to an Existing Invoice

Use the **Link Invoice** feature to link an existing invoice to a purchase order.

1. Open a purchase order.
2. Click **Link Invoice**.
3. Enter the **Vendor Invoice ID** of the invoice to which the PO will be linked.
4. Enter the **Provider code** from the invoice. The provider field is a type-ahead field that will list those provider codes available as characters.
5. Click **Link**.
6. The invoice will open in the same tab and all the line items on the purchase order will be added to the invoice.

#### Link Selected Line Items to an Existing Invoice

Use the Actions menu option **Link to Invoice for Selected Lineitems** to link one or more line items from a purchase order to an invoice.



## Search for line items from an invoice

Open an invoice, search for line items from the invoice, and add search results to a new or existing invoice. This feature is especially useful for populating an invoice with line items from multiple purchase orders.

In this example, we'll add line items to a new invoice:

1. Click Acquisitions → Create Invoice.
2. An invoice summary appears at the top of the invoice and includes the number of line items on the invoice and the expected cost of the items. This number will change as we add line items to the invoice.
3. Enter the invoice details (optional). If you do not enter the invoice details, then Evergreen will populate the Provider and Receiver fields with information from the line items.

Note - If you do not want to display the details, click Hide Details.

The screenshot shows the 'Invoice' form in the Evergreen system. At the top, it displays 'Lineitems: 0' and 'Expected Cost: 0.00'. Below this, a button labeled 'Hide Details' is highlighted with a red rectangle. The form contains several input fields for invoice details:

Vendor Invoice ID	ABCD1234	Invoice Date	8/23/2012
Receive Method	Paper	Invoice Type	
Provider	BT	Shipper	BT
Note		Payment Auth	
Payment Method	Credit Card	Receiver	BR1

4. Click the Search tab to add line items to an invoice.
5. Select your search criteria from the drop-down menu.
6. On the right side of the screen, Limit to Invoiceable Items is checked by default. Invoiceable items are those that are on order, have not been canceled, and have not yet been invoiced. Evergreen also filters out items that have already been added to an invoice. Finally, if this box is checked, and if you entered the invoice details at the top of the screen, then Evergreen will filter your search for items that have the same provider as the one that you entered. If you have not entered the invoice details, then Evergreen removes this limit.
7. Sort by title (optional). By default, results are listed by line item number. Check this box to sort by ascending title.
8. Building the results list progressively (optional). By default, new search results will replace previous results on the screen. Check this box for the search results list to build with each subsequent search. This option is useful for libraries that might search for line items by scanning an ISBN. Several ISBNs can be scanned and then the entire result set can be selected and moved to the invoice in a batch.
9. Click Search.

Invoice Search

Search for  matching  of the following terms ( ☐ building the results list progressively )

PO - Name  is  X

[Next](#) ☒ Sort by title ☒ Limit to Invoiceable Items

---

☐ Select All

<input type="checkbox"/>	<b><a href="#">Big Nate : the boy with the biggest head in the world / Lincoln Peirce., by Peirce, Lincoln. (9780007355167)</a></b> 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$10.00, Encumbered \$10.00, Paid \$0.00 # 663 <a href="#">20121120 11/20/12</a>
<input type="checkbox"/>	<b><a href="#">Diary of a Wimpy Kid: The Third Wheel, by (9781419705847)</a></b> 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$15.00, Encumbered \$15.00, Paid \$0.00 # 662 <a href="#">20121120 11/20/12</a>
<input type="checkbox"/>	<b><a href="#">Diary of a wimpy kid / ., by ()</a></b> 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$25.00, Encumbered \$25.00, Paid \$0.00 # 660 <a href="#">20121120 11/20/12</a>

10. Use the Next button to page through results, or select a line item(s), and click Add Selected Items to Invoice. The rows that you selected are highlighted, and the invoice summary at the top of the screen updates.

**Invoice**

Lineitems: **2**

Expected Cost: **40.99**

**ABCD1234**

Invoice Search

Search for  matching  of the following terms:

PO - Purchase Order ID  is

[Next](#)

---

<input type="checkbox"/>	<b><a href="#">A Thousand Splendid Suns, by Khaled Hosseini (9781594483851)</a></b> 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$10.99, Encumbered \$10.99, Paid \$0.00 # 55 <a href="#">4 8/23/12</a> <a href="#">Popular Fiction</a>
<input type="checkbox"/>	<b><a href="#">The Alchemist, by Paul Coelho (9780061122415)</a></b> 2 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$30.00, Encumbered \$30.00, Paid \$0.00 # 50 <a href="#">4 8/23/12</a> <a href="#">Popular Fiction</a>

11. Click the Invoice tab to see the updated invoice.
12. Evergreen automatically enters the number of items that was ordered in the # Invoiced and # Paid fields. Adjust these quantities as needed.

13. Enter the amount that the organization was billed. This entry will automatically propagate to the Paid field. The Per Copy field calculates the cost of each copy by dividing the amount that was billed by the number of copies for which the library paid.

Invoice

Search

Bibliographic Items

Title Details	# Invoiced / # Paid	Billed	Per Copy	Paid	Detach
<a href="#">A Thousand Splendid Suns</a> , by Khaled Hosseini (9781594483851) 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$10.99, Encumbered \$10.99, Paid \$0.00 # 55 <a href="#">4 8/23/12</a> <a href="#">Popular Fiction</a>	<div><div></div> / 1</div>	<div><div></div></div>	0.00	<div><div></div></div>	<a href="#">Detach</a>
<a href="#">The Alchemist</a> , by Paul Coelho (9780061122415) 2 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$30.00, Encumbered \$30.00, Paid \$0.00 # 50 <a href="#">4 8/23/12</a> <a href="#">Popular Fiction</a>	<div><div></div> / 2</div>	<div><div></div></div>	0.00	<div><div></div></div>	<a href="#">Detach</a>

Direct Charges, Taxes, Fees, etc.

Charge Type	Fund	Title/Description	Billed	Paid	Delete
					<a href="#">Delete</a>
<a href="#">Add Charge...</a>					

Save

Save & Clear

Prorate

Close

Total	Total	Balance
0.00	0.00	0.00

## Create an invoice for a nonEDI purchase order

You can create an invoice for all of the line items on a nonEDI purchase order. With the exception of fields with drop-down menus, no limitations on the data that you enter exist.

1. Open a nonEDI purchase order.
2. Click Create Invoice.
3. **Enter a Vendor Invoice ID.** This number may be listed on the paper invoice sent from your vendor.
4. **Choose a Receive Method from the drop-down menu.** The system will default to Paper.
5. The Provider is generated from the purchase order and is entered by default.
6. Enter a note (optional).
7. Select a payment method from the drop-down menu (optional).
8. The Invoice Date is entered by default as the date that you create the invoice. You can change the date by clicking in the field. A calendar drops down.
9. Enter an Invoice Type (optional).
10. The Shipper defaults to the provider that was entered in the purchase order.
11. Enter a Payment Authorization (optional).
12. The Receiver defaults to the branch at which your workstation is registered. You can change the receiver by selecting an org unit from the drop-down menu.
  - a. The bibliographic line items are listed in the next section of the invoice. Along with the title and author of the line items is a summary of copies ordered, received, invoiced, claimed, and cancelled. You can also view the amounts estimated, encumbered, and paid for each line item. Finally, each line item has a line item ID and links to the selection list (if used) and the purchase order.
13. Evergreen automatically enters the number of items that was ordered in the # Invoiced and # Paid fields. Adjust these quantities as needed.
14. **Enter the amount that the organization was billed.** This entry will automatically propagate to the Paid field. The Per Copy field calculates the cost of each copy by dividing the amount that was billed by the number of copies for which the library paid.
15. You have the option to add charge types if applicable. Charge types are additional charges that can be selected from the drop-down menu. Common charge types include taxes and handling fees.
16. You have four options for saving an invoice.
  - a. **Click Save** to save the changes you have made while staying in the current invoice.
  - b. **Click Save & Clear** to save the changes you have made and to replace the current invoice with a new invoice so that you can continue invoicing items.

- c. **Click Prorate** to save the invoice and prorate any additional charges, such as taxes, across funds, if multiple funds have been used to pay the invoice.
  - i. Prorating will only be applied to charge types that have the Prorate? flag set to true. This setting can be adjusted via Administration → Acquisitions Administration → Invoice Item Types.
- d. **Click Close**. Choose this option when you have completed the invoice. This option will also save any changes that have been made. Funds will be disencumbered when the invoice is closed.

## Link an existing invoice to a purchase order

You can use the link invoice feature to link an existing invoice to a purchase order. For example, an invoice is received for a shipment with items on purchase order #1 and purchase order #2. When the invoice arrives, purchase order #1 is retrieved, and the invoice is created. To receive the items on purchase order #2, simply link the invoice to the purchase order. You do not need to recreate it.

1. Open a purchase order.
2. Click Link Invoice.
3. Enter the Invoice # and the Provider of the invoice to which you wish to link.
4. Click Link.

The screenshot shows a software interface for managing purchase orders. On the left, there are labels for 'Encumbered \$0.00' and 'Total Spent \$40.00'. Below these is a dropdown menu with 'ns--' selected. In the center, under the 'Invoicing' section, there are buttons for 'View Invoices (1)', 'Create Invoice', and 'Link Invoice'. A 'Cancel' button with a dropdown arrow is also present. On the right, a modal window titled 'Choose invoice' is open. It contains two input fields: 'Invoice #' with the value '09090' and 'Provider' with the value 'Ingram'. A 'Link' button is at the bottom right of this modal.

## Electronic invoicing

1. Configure EDI for your provider.
2. Evergreen will receive invoices electronically from the provider.
3. Click Acquisitions → Open Invoices to view a list of open invoices, or use the General Search to retrieve invoices. Click a hyperlinked invoice number to view the invoice.

Acquisitions Search

Legacy Search Interface

Line Items SearchPurchase Orders SearchInvoices SearchSelection Lists Search

Search for records matching all of the following terms:

Invoice - Receiver

is

JCKSN

+

-

Invoice - Close Date

does NOT exist

+

-

Search

Set As Default Invoice Search

Reset Default Search

☒ Retrieve Results Immediately

Remove Filters

0 selected

I<

<

>

Rows 50

<input type="checkbox"/>	#	Vendor	Provider	Shipper	Receive	Payment	Invoice	Close Date	Receiver	Invoice	Payment	Note	Closed By
		Invoice ID			Method	Method	Date			Type	Auth		
		Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter	Filter

## View Invoice

You can view an invoice in one of four ways: view open invoices; view invoices on a purchase order; view invoices by searching specific invoice fields; view invoices attached to a line item.

1. To view open invoices, click Acquisitions → Open invoices. This opens the Acquisitions Search screen. The default fields search for open invoices. Click Search.
2. To view invoices on a purchase order, open a purchase order and click the View Invoices link. The number in parentheses indicates the number of invoices that are attached to the purchase order.

Provider [Ingram \(Ingram\)](#)

Notes [\(0\)](#)

Total Lineitems 2

EDI Messages [\(0\)](#)

Total Estimated \$45.00

History [View](#)

Total Encumbered \$0.00

Invoicing [View Invoices \(1\)](#)

Total Spent \$40.00

Cancel [Cancel order](#)

3. To view invoices by searching specific invoice fields, see the section on searching the acquisitions module.
4. To view invoices for a line item, see the section on line item invoices.



## Receive Items from Invoice

This feature enables users to receive items from an invoice. Staff can receive individual copies, or they can receive items in a batch.

### Receive Items in Batch (Numeric)

In this example, we have created a purchase order, added line items and copies, and activated the purchase order. We will create an invoice from the purchase order, receive items, and invoice them. We will receive the items in batch from the invoice.

1. Retrieve a purchase order.
2. Click **Create Invoice**.
3. The blank invoice appears. In the top half of the invoice, enter descriptive information about the invoice. In the bottom half of the invoice, enter the number of items for which you were invoiced, the amount that you were billed, and the amount that you paid.
4. Click **Save**. You must choose a save option before you can receive items.
5. The screen refreshes. In the top right corner of the screen, click **Receive Items**.
6. The **Acquisitions Invoice Receiving** screen opens. By default, this screen enables users to receive items in batch, or **Numeric Mode**. You can select the number of copies that you want to receive; you are not receiving specific copies in this mode.
7. Select the number of copies that you want to receive. By default, the number that you invoiced will appear. In this example, we will receive one copy of each title.
  - a. You cannot receive fewer items than 0 (zero) or more items than the number that you ordered.
8. Click **Receive Selected Copies**

### Acquisitions Invoice Receiving

Invoice #ABCD1234

[ [Use List Mode](#) ]

[One Good Turn](#), by Atkinson, Kate (9780552772440)  
2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled  
Estimated \$10.00, Encumbered \$0.00, Paid \$10.00  
# 36 [10 11/2/11](#)

Number of copies to receive:

[When Will There Be Good News?](#), by Atkinson, Kate (9780552772457)  
2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled  
Estimated \$10.00, Encumbered \$0.00, Paid \$10.00  
# 35 [10 11/2/11](#)

Number of copies to receive:

[Started Early, Took My Dog](#), by Atkinson, Kate (9780385608022)  
2 Ordered, 0 Received, 2 Invoiced, 0 Claimed, 0 Cancelled  
Estimated \$10.00, Encumbered \$0.00, Paid \$10.00  
# 34 [10 11/2/11](#)

Number of copies to receive:

- When you are finished receiving items, close the screen. You can repeat this process as you receive more copies.

## Receive Specific Copies (List)

In this example, we have created a purchase order, added line items and copies, and activated the purchase order. We will create an invoice from the purchase order, receive items, and invoice them. We will receive specific copies from the invoice. This function may be useful to libraries who purchase items that have been barcoded by their vendor.

- Complete steps 1-5 to [Receive Items in Batch \(List Mode\)](#).
- The **Acquisitions Invoice Receiving** screen by default enables users to receive items in batch, or **Numeric Mode**. Click **Use List Mode** to receive specific copies.
- Select the checkboxes adjacent to the copies that you want to receive. Leave the copies that you do not want to receive unchecked.
- Click **Receive Selected Copies**.

Acquisitions Invoice Receiving

Invoice #ABCD1234

[\[ Use Numeric Mode \]](#)

Receive Selected Copies

<input checked="" type="checkbox"/> Select All	Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode
<a href="#">One Good Turn</a> , by Atkinson, Kate (9780552772440) 2 Ordered, 1 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated \$10.00, Encumbered \$0.00, Paid \$10.00 # 36 <del>10</del> 10.11/2/11							
<input checked="" type="checkbox"/>	BR1	Stacks		Book	PF	on order	ACQ31
<a href="#">When Will There Be Good News?</a> , by Atkinson, Kate (9780552772457) 2 Ordered, 1 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated \$10.00, Encumbered \$0.00, Paid \$10.00 # 35 <del>10</del> 10.11/2/11							
<input type="checkbox"/>	BR1	Stacks		Book	PF	on order	ACQ29
<a href="#">Started Early, Took My Dog</a> , by Atkinson, Kate (9780385608022) 2 Ordered, 1 Received, 2 Invoiced, 0 Claimed, 0 Cancelled Estimated \$10.00, Encumbered \$0.00, Paid \$10.00 # 34 <del>10</del> 10.11/2/11							
<input type="checkbox"/>	BR1	Stacks		Book	PF	on order	ACQ27

The screen will refresh. Copies that have not yet been received remain on the screen so that you can receive them when they arrive.

- When all copies on an invoice have been received, a message confirms that no copies remain to be received.
- The purchase order records items that have been received.



# Managing patron purchase requests

Patron Requests can be used to track purchase suggestions from patrons in Evergreen. This feature allows purchase requests to be placed on selection lists to integrate with the Acquisitions module. Patron Requests can be accessed through the Acquisitions module under **Acquisitions** → **Patron Requests** and through patron accounts under **Other** → **Acquisition Patron Requests**. Requests can be placed and managed through both interfaces.

## Place a patron request

1. Go to Acquisitions → Patron Requests. This interface is scoped by Patron Home Library and will default to the library for which your workstation is registered.
  - a. Requests can also be placed directly through a patron account, in which case the interface will scope to the patron ID.

Acquisition Patron Requests

Patron Home Library: BR1 ▾

Create Request Clear Completed Requests Show Canceled Requests ☐

⏮ ⏪ ⏩ ⏭ Actions ▾ Rows 25 ▾ Page 1 ▾ ▾

#	<input type="checkbox"/>	Place Hold	Pickup Lib	ISxN	Request Type	Article Title	User Barcode	Need Before Date	Request Status	Request Date/Time	Title
1	<input type="checkbox"/>	true	BR1	9780765324...	Books		9999939453...		Ordered, Ho...	6/8/2018 5:1...	The Word fo...
2	<input type="checkbox"/>	true	BR1	123456789	Books		9999931235...		Received	6/1/2018 10:...	Chesapeake...
3	<input type="checkbox"/>	false	BR1		Books		9999938940...		Pending	6/1/2018 1:0...	test
4	<input type="checkbox"/>	true	BR1	9780062319...	Books		9999933585...		New	6/11/2018 9:...	I'll be Gone i...
5	<input type="checkbox"/>	true	BR1	0131326176...	Books		9999930341...		New	6/8/2018 6:3...	Railway Man

2. Click **Create Request** and a modal with the patron request form will appear.
3. Create the request by filling out the following information:
  - a. **User Barcode** (required): enter the barcode of the user that is placing the request
  - b. **User ID**: this field will populate automatically when the User Barcode is entered
  - c. **Request Date/Time**: this field will populate automatically
  - d. **Need Before Date/Time**: if applicable, set the date and time after which the patron is no longer interested in receiving this title
  - e. **Place Hold?**: check this box to place a hold on this title for this patron. Holds are placed when the bib and item record are created in the catalog as part of the acquisitions process.
  - f. **Pickup Library**: pickup library for the hold. This field will default to the patron's home library if the pickup library is not selected in the patron account.
  - g. **Notify by Email When Hold is Ready and Notify by Phone When Hold is Ready**: preferences set in patron account will be used or can be set manually here.
  - h. **Request Type** (required): type of material requested
  - i. **ISxN** (ISBN, ISSN)
  - j. **UPC**
  - k. **Title**
  - l. **Volume**
  - m. **Author**
  - n. **Publisher**

- o. *Publication Location*
  - p. *Publication Date*
  - q. *Article Title*: option available if Request Type is “Articles”
  - r. *Article Pages*: option available if Request Type is “Articles”
  - s. *Mentioned In*
  - t. *Other Info*
4. Click **Save** at the bottom of the form.

Create Patron Request

User Barcode

99999303411

Smith, Sarah : SL1

User ID

87

Request Date/Time

Need Before Date/Time

2018-10-01

12

00

AM

☒ Place Hold?

Pickup Library SL1

☒ Notify By Email When Hold Ready?

☐ Notify By Phone When Hold Ready?

Request Type

Books

ISxN

9780062409959

UPC

UPC...

Title

Appetites

Volume

Volume...

Author

Bourdain, Anthony

Publisher

Ecco

Publication Location

## Actions for requests

After placing a Patron Request, a variety of actions can be taken by selecting the request, or right-clicking, and selecting Actions within either **Acquisitions** → **Patron Requests** or through the patron account under **Other** → **Acquisition Patron Requests**:

- **Edit Request** - make changes to the request via the original request form. Edits can be made when the status of a request is New.
- **View Request** - view a read-only version of the request form
- **Retrieve Patron** - retrieve the account of the patron who placed the request
- **Add Request to Selection List** - add the request to a new or existing Selection List in the Acquisitions module. The bibliographic information in the request will generate the MARC order record. From the selection list, the request will be processed through the acquisitions module and the status of the request itself will be updated accordingly.
- **View Selection List** - view the Selection List a request has been added to (this option will be active only if the request is on a selection list)
- **Set Hold on Requests** - allows you to indicate that a hold should be placed on the requested title, without needing to go in and edit the request. You can set a hold as long as the status of the request is New or Pending.
- **Set No Hold on Requests** - allows you to indicate that a hold should not be placed on the requested title, without needing to go in and edit the request individually.
- **Cancel Requests** - cancel the request and select a cancellation reason

## Place purchase request from a patron record

Patrons may wish to suggest titles for your Library to purchase. You can track these requests within Evergreen, whether or not you are using the acquisitions module for other purposes. This section describes how you can record these requests within a patron's record.

1. Retrieve the patron's record.
2. Select Other → Acquisition Patron Requests. This takes you to the Acquisition Patron Requests Screen. Right click to open this in a new browser tab.
3. The Acquisition Patron Requests Screen will show any other requests that this patron has made. You may sort the requests by clicking on the column headers.
4. To show canceled requests, click the Show Canceled Requests checkbox.
5. To add the request, click the Create Request button.
  - a. You will need the CREATE\_PURCHASE\_REQUEST permission to add a request.

6. The request type field is required. Every other field is optional, although it is recommended that you enter as much information about the request as possible.
7. The Pickup Library and User ID fields will be filled in automatically.
8. Request Date/Time and User Barcode will be automatically recorded when the request is saved.
9. Notify by Email When Hold is Ready and Notify by Phone When Hold is Ready will pull in preferences from the patron account if left blank, or can be set manually here.
10. You have the option to automatically place a hold for the patron if your library decides to purchase the item. If you'd like Evergreen to generate this hold, check the Place Hold box.
11. When you have finished entering information about the request, click the Save button.

# “Blanket” Orders

"Blanket" orders allow staff to invoice an encumbered amount multiple times, paying off the charge over a period of time. The work flow supported by this development assumes staff does not need to track the individual contents of the order, only the amounts encumbered and invoiced in bulk.

## Example

1. Staff creates PO with a Direct Charge of "Popular Fiction 2022" and a charge type of "Blanket Order".
2. The amount entered for the charge equals the total amount expected to be charged over the duration of the order.
3. When a shipment of "Popular Fiction" items arrive, staff creates an invoice from the "Popular Fiction 2022" PO page and enters the amount billed/paid for the received shipment under the "Popular Fiction 2022" charge in the invoice.
4. When the final shipment arrives, staff select the *Final invoice for Blanket Order* option on the invoice screen to mark the PO as received and drop any remaining encumbrances to \$0.
5. Alternatively, if the PO needs to be finalized without creating a final invoice, staff can use the new *Finalize Blanket Order* option on the PO page.

## More details about blanket Orders

- Any direct charge using a *blanket* item type will create a long-lived charge that can be invoiced multiple times.
- Such a charge is considered open until its purchase order is "finalized" (received).
- "Finalizing" a PO changes the PO's state to *received* (assuming there are no pending lineitems on the PO) and fully dis-encumbers all *blanket* charges on the PO by setting the fund\_debit amount to \$0 on the original fund\_debit for the charge.
- Invoicing a *blanket* charge does the following under the covers:
  - Create an invoice\_item to track the payment
  - Create a new fund\_debit to implement the payment whose amount matches the invoiced amount.
- Subtract the invoiced amount from the fund\_debit linked to the original *blanket* po\_item, thus reducing the amount encumbered on the charge as a whole by the invoiced amount.
- A PO can have multiple blanket charges. For example, you could have a blanket order for "Popular Fiction 2022" and a second charge for "Pop Fiction 2022 Taxes" to track / pay taxes over time on a blanket charge.
- A PO can have a mix of lineitems, non-blanket charges, and blanket charges.
- A *blanket* Invoice Item Type cannot also be a *prorate* type, since it's nonsensical. Blanket items are encumbered, whereas prorated items are only paid at invoice time and never encumbered.

# Acquisitions Administration

## Acquisitions Settings

### Local Administrator Permission Required

Several settings in the Library Settings editor of the Administration module pertain to functions in the Acquisitions module. You can access these settings by clicking **Administration -> Local Administration -> Library Settings Editor**. Some are set for the entire Evergreen Indiana consortium; some are intentionally left unset; and others may be updated locally.

**Red:**do not change; **yellow:**optional (recommended for review); **green:** local setting recommended.

Group	Setting Name	Default Setting	Notes
Cataloging	Delete bib if all copies are deleted via Acquisitions lineitem cancellation	NULL	If you cancel a line item, then all of the on-order copies in the catalog are deleted. If, when you cancel a line item, you also want to delete the bib record, this setting would be set to TRUE. In Evergreen Indiana, we leave this unset because of our shared catalog.
Acquisitions	Allow funds to be rolled over without bringing the money along	NULL	
Acquisitions	Default circulation modifier	NULL	This modifier would be applied to items that are created in the acquisitions module. Local administrators in EI may choose to define this using the circulation matrix.
Acquisitions	Default copy location	NULL	Copy location refers to the shelving location applied to items created in acquisitions. These shelving locations are those available at the context location established by the registered workstation being used.
Acquisitions	Fund Spending Limit for Block	99	When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will be blocked.
Acquisitions	Fund Spending Limit for Warning	NULL	When the amount remaining in the fund, including spent money and encumbrances, goes below this percentage, attempts to spend from the fund will result in a warning to staff.
Acquisitions	Rollover Distribution Formulae Funds	NULL	When set to true, during fiscal rollover, all distribution formulae will update to use new funds.
Acquisitions	Set copy creator as receiver	NULL	When receiving a copy in acquisitions, set the copy "creator" to be the staff that received the copy.
Acquisitions	Temporary barcode prefix	NULL	Temporary barcode prefix for items that are created in the acquisitions module.
Acquisitions	Temporary call number prefix	NULL	Temporary call number prefix for items that are created in the acquisitions module.

## Cancel/Delay Reasons

Access the Cancel Reasons interface by clicking Administration -> Acquisitions Administration -> Cancel Reasons. The Cancel Reasons interface enables you to predefine the reasons for which a Line Item or a Purchase Order can be canceled or delayed. A default list of reasons appears, but you can add custom reasons to the list. Applying the cancel reason will prevent the item from appearing in a claims list and will allow you to cancel debits associated with the purchase. Cancel reasons also enable you to delay a purchase. For example, you could create a cancel reason of “backordered,” and choose to keep the debits associated with the purchase.

### Create a cancel/delay reason

1. To add a new cancel reason, *click Administration -> Acquisitions Administration -> Cancel Reasons.*
2. Click *New Cancel Reason.*
3. Select a Using Library from the drop-down menu. The Using Library indicates the organizational units whose staff can use this Cancel Reason.
4. Create a label for the Cancel Reason. This label will appear when you select a cancel reason on an Item (in acquisitions) or a Purchase Order.
5. Create a description of the Cancel Reason. This is a free text field.
6. If you want to retain the debits associated with the canceled/delayed purchase, click the *Keep Debits?* box.
7. Click *Save.*

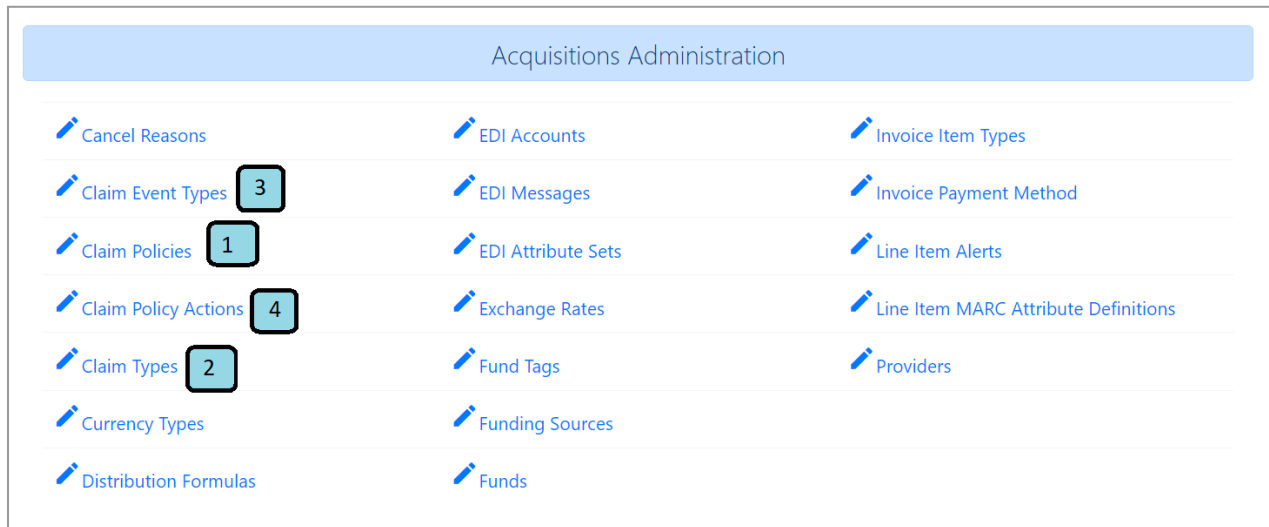
### Delete a local cancel/delay reason

You can delete local cancel/delay reasons.

1. Select the checkbox for the local cancel/delay reason that will be deleted.
2. From the *Grid Actions Menu* or *Right-click Actions Menu*, selected *Delete Selected.*
  - a. Default cancel reasons cannot be selected for deletion because Evergreen ILS expects those reasons to be available to handle EDI order responses.

# Claiming

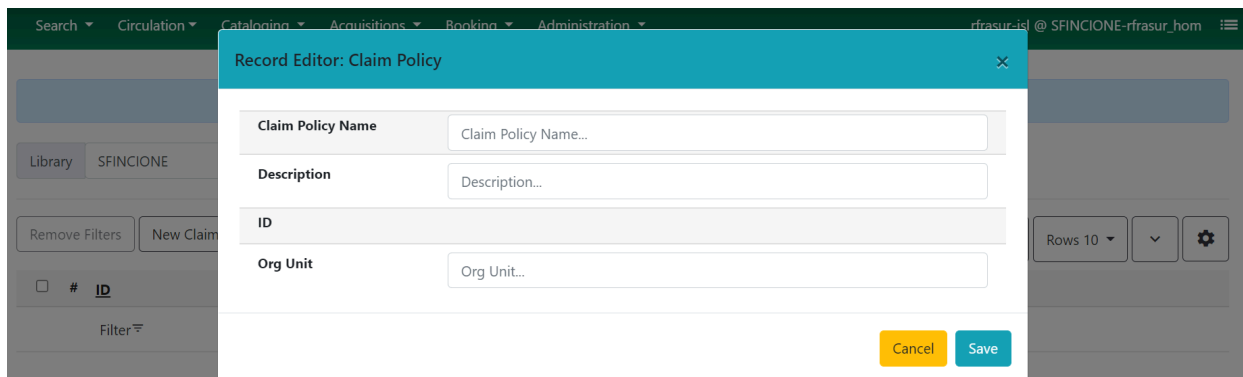
The Acquisitions Module enables claim policies to be built and action(s) be specified that users should take to claim items. To enable claiming, it is necessary to **create claim policies, claim types, claim event types, and claim policy actions**. The interfaces to create these components are linked on the **Acquisitions Administration** page accessed from the **Administration Menu**.



## Create a claim policy

To create a **Claim Policy**:

1. Open the **Claim Policies** interface from the **Acquisitions Administration** page.
2. Select **New Claim Policy**. A dialog box will open.



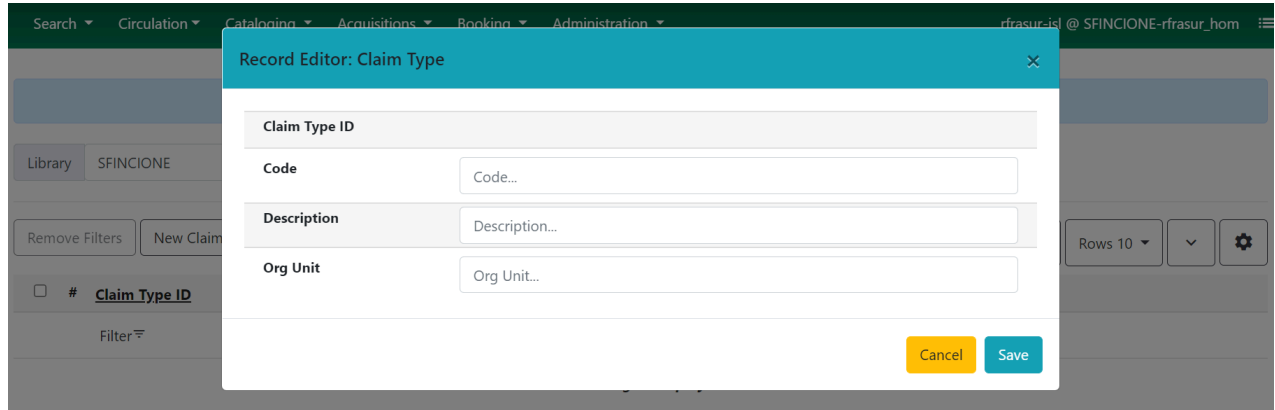
3. In the dialog box, **Name** the Claim Policy (eg. Damaged Upon Arrival).
4. Provide a brief **Description** for the Claim Policy.
5. Select the appropriate **Org Unit** from the dropdown menu. The Org Unit indicates the library system or branch whose staff can use the claim policy. Currently, Evergreen Indiana has no default claim policies and these must be built locally.
  - a. In most cases, for a **multi-branch library system**, the Org Unit should be the library system shortcode (eg. SCOTT). The “rule of parental inheritance” applies to this list meaning that all branch locations for the multi-branch library system will have access to this claim type.
  - b. For **single-branch library systems** (one location), the Org Unit should be the library branch shortcode (eg. HGSTN-HAG).
6. **Save**.



## Create a claim type

To create a **Claim Type**:

1. Open the **Claim Types** interface from the **Acquisitions Administration** page.
2. Select **New Claim Type**. A dialog box will open.



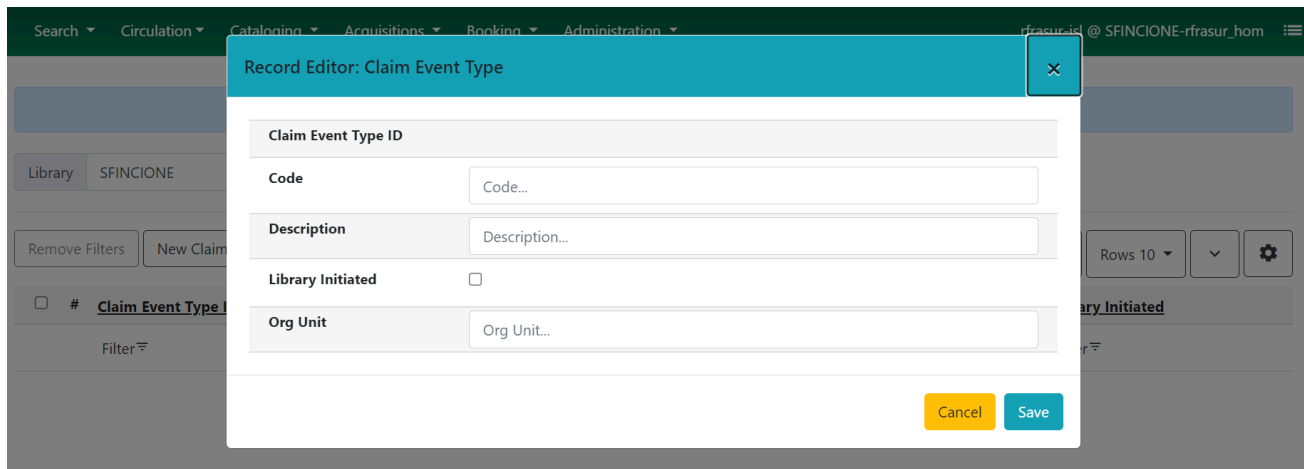
3. In the dialog box, add a **Code** for the claim type (eg. DamageByCourier).
4. Provide a brief **Description** for the claim type.
5. Select the appropriate **Org Unit** from the dropdown menu.
  - a. In most cases, for a **multi-branch library system**, the Org Unit should be the library system shortcode (eg. SCOTT). The “rule of parental inheritance” applies to this list meaning that all branch locations for the multi-branch library system will have access to this claim type.
  - b. For **single-branch library systems** (one location), the Org Unit should be the library branch shortcode (eg. HGSTN-HAG).
6. **Save**.

## Create a claim event type

The claim event type describes the physical action that should occur when an item needs to be claimed. For example, the user should notify the vendor via email that the library is claiming an item.

To create a **Claim Event Type**:

1. Open the **Claim Event Types** interface from the **Acquisitions Administration** page.
2. Select **New Claim Event Type**. A dialog box will open.



3. In the dialog box, enter a **Code** for the claim event type (eg. CALL).
4. Provide a brief **Description** for the claim event type (eg. Call Vendor).
5. If this claim is initiated by the user, check the box adjacent to **Library Initiated**

- a. Currently, all claims are initiated by a user. The ILS does not automatically claim an issue. *This box should be selected.*
6. Select the appropriate **Org Unit** from the dropdown menu.
  - a. In most cases, for a **multi-branch library system**, the Org Unit should be the library system shortcode (eg. SCOTT). The “rule of parental inheritance” applies to this list meaning that all branch locations for the multi-branch library system will have access to this claim type.
  - b. For **single-branch library systems** (one location), the Org Unit should be the library branch shortcode (eg. HGSTN-HAG).
7. **Save.**

## Create a Claim Policy Action

The claim policy action enables the acquisitions administrator to specify how long a user should wait before claiming an item.

To create a **Claim Policy Action**:

1. Open the **Claim Policy Action** interface from the Acquisitions Administration page.
2. Select **New Claim Policy Action**.

The screenshot shows a web application interface for creating a Claim Policy Action. The dialog box is titled "Record Editor: Claim Policy Action" and has a close button (X) in the top right corner. It contains the following fields:

- Action (Event Type):** A dropdown menu with "CALL" selected.
- Action Interval:** A text input field containing "3 days".
- Claim Policy ID:** A dropdown menu with "Damaged Upon Arrival" selected.
- ID:** An empty text input field.

At the bottom right of the dialog are two buttons: "Cancel" (yellow) and "Save" (teal).

3. In the dialog box, select an **Action (Event Type)**. This list populates with the **Claim Event Type(s)** previously configured.
4. Enter an **Action Interval**. This field indicates how long a user should wait before claiming an item.
5. Select a **Claim Policy** from the **Claim Policy ID** dropdown. This list populates with the **Claim Policy/ies** previously configured.
6. **Save.**

## Currency Types

Currency Types are created at the consortium level. If an additional currency type is desired, please submit a helpdesk ticket.

## Distribution Formulas

Distribution formulas serve as templates allowing settings to be predefined for copies added to line items. To create and edit distribution formulas, select the Distribution Formulas link on the Acquisitions Administration page.

## Create a distribution formula

To create a distribution formula:

1. In the Distribution Formula interface, select **New Formula**.
2. Enter a **Formula Name**. No limits exist on the number of characters that can be entered in this field. It is recommended that names be descriptive but concise.
3. Choose a **Formula Owner** from the dropdown menu. The **Formula Owner** indicates the organizational units whose staff can use the formula.
  - For a **multi-branch library system**, the Formula Owner may be the library system shortcode (eg. SCOTT) or the library branch shortcode (eg. SCOTT-LEX). The “rule of parental inheritance” applies to this list meaning that, when the Formula Owner is set to the system level, all branch locations for the multi-branch library system will have access to this distribution formula.
  - For **single-branch library systems** (one location), the Formula Owner should be the library branch shortcode (eg. HGSTN-HAG).
4. **Ignore the Skip Count field**. This is not currently functional.
5. Save. The configuration page for the newly created distribution formula will automatically appear.
6. Select **New Entry**.
7. Select an **Owning Library** from the dropdown menu. This indicates the branch that will receive the items.
8. Select/enter any of the following copy details you want to predefine in the distribution formula.
  - Copy Location (analogous to Shelving Location)
  - Fund
  - Circ Modifier
  - Collection Code (rarely used)
9. In the **Item Count** field, enter the number of items that should be distributed.
10. **Apply Changes**. The screen will automatically reload.

## Edit a distribution formula

Edit a distribution formula by clicking the hyperlinked title of the formula in the Distribution Formulas interface and making any changes. **Apply Changes** to save updates.

To edit the Formula Name, click the hyperlinked name of the formula in the top left corner. A pop-up box will appear allowing a new name to be entered.

## Electronic Data Exchange (EDI)

EDI accounts enable libraries to send purchase orders and receive invoices from providers electronically. In Evergreen Indiana, libraries can have EDI accounts set up and managed by EI administrators. EDI messages and notes can be viewed in the acquisitions module.

## SANS (Standard Address Numbers)

For EDI to work, a library must have a SAN and each of the library’s providers must supply EI administrators with their SAN. Similar to an ISBN, a SAN must be purchased. More information about purchasing a SAN is available [here](#).

## Create an EDI Account

Note - A provider must be created in Evergreen prior to an EDI account being created for that provider.

1. Contact the provider requesting the following information:
  - a. Host
  - b. Username
  - c. Password
  - d. Path
  - e. Incoming Directory
  - f. Provider's SAN
2. Select *EDI Accounts* from Acquisitions Administration page.
3. Click *New Account*.
4. In the dialog box that opens, fill in the following fields:
  - a. In the *Label* field, enter a name for the EDI account. (Required)
  - b. In the *Provider* field, select the code used in Evergreen for the provider. (Required)
  - c. Select the appropriate library as the *Owner* from the drop-down menu. Multi-branch libraries should select their top level organizational unit.
  - d. In the *Host* field, enter the requisite FTP or SCP information supplied by the provider. Be sure to include the protocol (e.g. ftp://ftp.vendorname.com).
  - e. In the *Account* field, enter information supplied by the provider.
  - f. In the *Vendor Account Number* field, enter information supplied by the provider.
  - g. The *Last Activity* field updates automatically with any inbound or outbound communication.
  - h. In the *Username* field, enter the username supplied by the provider.
  - i. In the *Password* field, enter the password supplied by the provider.
  - j. In the *Path* field, enter the path supplied by the provider. The path indicates a directory on the provider's server where Evergreen will deposit its outgoing order files.
    - i. If your provider requests a specific file extension for EDI purchase orders, such as .ord, enter the name of the directory, followed by a slash, followed by an asterisk, followed by a period, followed by the extension. For example, if the provider requests that EDI purchase orders be sent to a directory called **in** with the file extension **.ord**, your path would be **in/\*.ord**.
  - k. In the *Incoming Directory* field, enter the incoming directory supplied by the provider. This indicates the directory on the vendor's server where Evergreen will retrieve incoming order responses and invoices.
    - i. Don't worry if the incoming directory is named **out** or **outgoing**. From the provider perspective, this directory is outgoing.
  - l. If your Provider requires the use of an Attributes set, check the box next to *Use EDI Attributes* and select the correct Attributes set from the *EDI Attributes Set* drop-down.
5. Click *Save*.
  - a. If there are multiple EDI Accounts for a Provider, an EDI default can be set from the Provider interface.

## EDI Attribute Sets

EDI Attribute Sets define the information that is sent to a vendor in EDI messages. Evergreen currently has stock EDI Attribute Sets for use with several materials vendors:

- Baker & Taylor Default
- Brodart Default

- Ingram Default
- Midwest Library Service
- Midwest Tape Default
- Recorded Books Default
- ULS Default

These stock EDI Attribute Sets can be modified depending on EDI configuration needs and customized EDI Attribute Sets can also be created.

EDI Attribute Sets are linked to EDI Accounts in *Administration* → *Acquisitions Administration* → *EDI Accounts*.

EDI Attribute Sets				
Remove Filters		New EDI Attribute Set		0 selected
				<div> <div>☰</div> <div>⏪</div> <div>⏴</div> <div>⏵</div> <div>⏩</div> <div>Rows 10 ▾</div> <div>⌵</div> <div>⚙️</div> </div>
<input type="checkbox"/>	#	Label	# Providers Using Attribute Set	View Providers
Filter				
<input type="checkbox"/>	1	Ingram Default	0	View Providers
<input type="checkbox"/>	2	Baker & Taylor Default	0	View Providers
<input type="checkbox"/>	3	Brodart Default	0	View Providers
<input type="checkbox"/>	4	Midwest Tape Default	0	View Providers
<input type="checkbox"/>	5	ULS Default	0	View Providers
<input type="checkbox"/>	6	Recorded Books Default	0	View Providers
<input type="checkbox"/>	7	Midwest Library Service	0	View Providers

## View or modify existing EDI Attribute Set configuration

To view or modify an existing EDI Attribute Set:

1. Select the EDI Attribute Set row and go to the Actions menu or right-click to view the Actions menu and select Edit Selected.
2. The EDI Attribute Set editor will appear.
3. The Attribute Set Label will display the name of the EDI Attribute Set you are editing.
4. A list of attributes and their descriptions display. If the box next to the attribute is checked, the attribute will be included in the EDI Attribute Set and the information will be sent to the vendor via EDI order message when an order is placed in Evergreen.
5. Add or remove attributes from the set using the checkboxes and click Save.

## Create a new EDI Attribute Set

To create a new EDI Attribute Set:

1. Click New EDI Attribute Set.

2. Enter an Attribute Set Label to assign a name to the new attribute set. This may be the name of the vendor.
3. Check the box next to each attribute to be included in the EDI Attribute Set.
4. Click Save.

## **Clone an EDI Attribute Set**

To clone an EDI Attribute Set:

1. Right click on the row of an Attribute Set.
2. Select Clone Selected.
3. Enter an Attribute Set Label to assign a new unique name to the cloned attribute set.
4. Check or uncheck boxes next to attributes to make changes to the Attribute Set.
5. Click Save.

## **EDI Messages**

The EDI Messages screen displays all incoming and outgoing messages between the library and its EDI providers. To see details of a particular message, including the raw EDIFACT message, double click on a message entry. To find a specific EDI message, the Filter options can be useful. EDI messages that pertain to a specific purchase order can be viewed from the purchase order interface.

## **Exchange Rates**

Exchange rates define the rate of exchange between currencies. When defined, Evergreen will automatically calculate exchange rates for purchases.

Generally, Evergreen assumes that the currency of the purchasing fund is identical to the currency of the provider, but it provides for two unique situations.:

1. If the currency of the fund used for a purchase is different from the currency of the provider as listed in the provider profile, Evergreen will use the exchange rate to calculate the price of the item in the currency of the fund and debit the fund accordingly.
2. When money is transferred between funds that use different currency types, Evergreen will automatically use the exchange rate to convert the money to the currency of the receiving fund. During such transfers, however, staff can override the automatic conversion by providing an explicit amount to credit the receiving fund.

If a library will be using multiple currency types for acquisitions, please contact the Helpdesk to configure currency type and exchange rates.

# Fund Tags

Fund tags can be applied to funds to group funds for easy reporting. For example, a library with three funds for children’s materials (Children’s Board Books, Children’s DVDs, and Children’s CDs) assigns a fund tag of “Children” to each fund. That library can now run a report based on the fund tag “Children” to find total expenditures on children’s materials rather than reporting on each individual fund.

## Create a Fund Tag

- 1. Select Fund Tags on the Acquisitions Administration page to access the interface.
- 2. Click *New Fund Tag*.
- 3. Enter a Fund Tag Name. No limits exist on the number of characters that can be entered in this field.
- 4. Select a Fund Tag Owner from the drop-down menu. The owner indicates the library system or branch whose staff can use the fund tag.
- 5. Click *Save*.

Fund Administration

FundsFunding SourcesFund Tags

LibraryBR1

☐ + Ancestors☐ + Descendants

Remove FiltersNew Fund TagApply Translations

0 selected

I<

<

>

Rows 10

<input type="checkbox"/>	#	Fund Tag ID	Fund Tag Owner	Fund Tag Name
		Filter	Filter	Filter
<input type="checkbox"/>	1	4	BR1	Fiction
<input type="checkbox"/>	2	16	BR1	Non-Fiction
<input type="checkbox"/>	3	17	BR1	AV

## Add a Fund Tag to a Fund

To add a fund tag to a specific fund:

1. Go to the *Funds* tab in the Fund Administration screen.
2. Click on the *Name* of the Fund to which you want to add the Fund Tag.
3. The Fund Details screen will appear. Click on the *Tags* tab.
4. Select a Fund Tag from the drop-down menu and click *Add Tag*.
  - a. You may add multiple tags to a fund.
  - b. You will see a message in the lower right of the screen confirming that a tag has been added.
5. To remove a tag, click the trash can icon next to the tag. You will see a message in the lower right of the screen confirming that the tag has been removed.
6. Click *Close*.

Fund Details - LibraryB Adult (B-ADULT (2021) (BR1))

Create Allocation Transfer Money Set Default View

Summary Allocations Transfers Debits Tags

AV (BR1) Fiction (BR1)

Select tag Add Tag

Close

## Funding Sources

Funding sources allow you to specify the sources that contribute monies to your fund(s). You can create as few or as many funding sources as you need. These can be used to track exact amounts for accounts in your general ledger. You can then use funds to track spending and purchases for specific collections.

Examples of funding sources are:

- A municipal allocation (general/operating) for your materials budget;
- A trust fund used for collections;
- A revolving account that is used to replace lost materials;
- Grant funds to be used for collections.
- Gift fund
- Friends of the Library grant or fund

## Create a funding source

To create a new funding source:

1. Select *Funding Sources* from Acquisitions Administration page.
2. In the upper right corner of the page, click on New Funding Source.
3. Enter a Funding Source Name.
  - a. No limits exist on the number of characters that can be entered in this field.
  - b. A Funding Source Name is generally somewhat descriptive and unambiguous.



4. Select an Owner from the drop-down menu. The owner indicates the library system or branch whose staff can use this funding source.
  - a. The rule of parental inheritance applies to this list. For example, if a system is made the owner of a funding source, then users with appropriate permissions at the branches within the system could also use the funding source.
5. Create a Code for the source.
  - a. No limits exist on the number of characters that can be entered in this field.
  - b. A funding source code is generally a short character string that is unambiguous but concise.
6. Select a Currency from the drop-down menu. This menu is populated from the choices in the Currencies Types interface.
7. Click **Save**.

## Allocate credits to funding sources

Allocate monies to funding sources by applying credits.

When entering the amount of money that the funding source contributes to the organization, remember that funding sources are not tied to fiscal or calendar years, so you can continue to add money to the same funding source over multiple years, e.g. County Funding.

Alternatively, you can name funding sources by year, e.g. County Funding 2020 and County Funding 2021, and apply credits each year to the matching source.

To apply a credit,

1. Click on the hyperlinked name of the funding source. The Funding Source Details will appear.
2. Click **Apply Credit**.
3. Enter an amount to apply to this funding source.
4. Enter a note. This field is optional.
5. Click **Apply**.

## Allocate credits to funds

If funds have already been set up, click the **Allocate to Fund** button to apply credits from the funding sources to the funds. If funds have not yet been set up, or an additional fund needs to be added, credits can be allocated to funds from the funds interface.

1. To allocate credits to funds, click *Allocate to Fund*.
2. Enter the amount to allocate.
3. Enter a note. This field is optional.
4. Click *Apply*.

## Track debits and credits

Track credits to and allocations from each funding source in this interface. These amounts are updated when credits and allocations are made in the Funding Source Details. Access the Funding Source Details by clicking on the hyperlinked name of the Funding Source.

## Funds

Funds allow credits to be allocated toward specific purchases. Access the funds interface to create funds; allocate credits from funding sources to funds; transfer money between funds; and apply fund tags to funds.

Funds are created for a specific year, either fiscal or calendar. These funds are owned by library branches or systems. At the top of the funds interface, a contextual library and year can be set. The drop-down menu at the top of the screen enables you to focus on funds that are owned by specific libraries during specific years.

## Create a fund

To create a new fund:

1. Click Administration → Acquisitions Administration → Funds.
2. Enter a name for the fund. No limits exist on the number of characters that can be entered in this field.
3. Create a code for the fund. No limits exist on the number of characters that can be entered in this field.
4. Enter a year for the fund. This can be a fiscal year or a calendar year. The format of the year is YYYY.
5. Select an org unit from the drop-down menu. The org unit indicates the organizational units whose staff can use this fund. This menu is populated with the shortnames that you created for your libraries in the organizational units tree (See Administration → Server Administration → Organizational Units).
  - a. The rule of parental inheritance applies to this list. See section
6. Select a currency type from the drop-down menu. This menu is comprised of entries in the currency types menu. When a fund is applied to a line item or copy, the price of the item will be encumbered in the currency associated with the fund.
7. Click the Active box to activate this fund. You cannot make purchases from this fund if it is not active.
8. Enter a Balance Stop Percent. The balance stop percent prevents you from making purchases when only a specified amount of the fund remains. For example, if you want to spend 95 percent of your funds, leaving a five percent balance in the fund, then you would enter 95 in the field. When the fund reaches its balance stop percent, it will appear in red when you apply funds to copies.
9. Enter a Balance Warning Percent. The balance warning percent gives you a warning that the fund is low. You can specify any percent. For example, if you want to spend 90 percent of your funds and be warned when the fund has only 10 percent of its balance remaining, then enter 90 in the field. When the fund reaches its balance warning percent, it will appear in yellow when you apply funds to copies.
10. Check the Propagate box to propagate funds. When you propagate a fund, the ILS will create a new fund for the following fiscal year with the same parameters as your current fund. All of the settings transfer except for the year and the amount of money in the fund. Propagation occurs during the fiscal year close-out operation.
11. Check the Rollover box if you want to roll over remaining funds into the same fund next year. You should also check this box if you only want to roll over encumbrances into next year's fund.
  - a. This should generally only be done in the case of funds with funding sources such as gift or memorial or, in some cases, grant.
12. Click Save.

## Allocate credits from funding sources to funds

### Transfer credits between funds

### Track balances and expenditures

### Fund reporting

A core source, Fund Summary, is available in the reports interface. This core source enables librarians to easily run a report on fund activity. Fields that are accessible in this interface include Remaining Balance, Total Allocated, Total Encumbered, and Total Spent.

## Edit a fund

## Perform fiscal year close-out operation

## Invoice menus

Invoice menus allow you to create drop-down menus that appear on invoices. You can create an invoice item type or invoice payment method.

### Invoice item type

The invoice item type allows you to enter the types of additional charges that you can add to an invoice. Examples of additional charge types might include taxes or processing fees. Charges for bibliographic items are listed separately from these additional charges. A default list of charge types displays, but you can add custom charge types to this list. Invoice item types can also be used when adding non-bibliographic items to a purchase order. When invoiced, the invoice item type will copy from the purchase order to the invoice.

To create an invoice type:

1. Select *Invoice Item Type* on the Acquisitions Administration page.
2. Click *New Invoice Item Type*.
3. Create a code for the charge type. A code is generally a short but understandable character string.
4. Create a label. A label is generally more descriptive than a code.
  - a. No limits exist for the number of characters that can be used in either Invoice Item Type codes or labels.
5. If items on an invoice were purchased with monies from multiple funds, you can divide the additional charges (based on invoice item types) across funds.
  - a. Check the box adjacent to Prorate if you want to prorate the additional charge across funds.
6. Click **Save**.

[Open in New Window](#) [Refresh](#)

#### Invoice

Lineitems: 1

Expected Cost: 11.07

[Show Details](#) 2033840075/6

[Invoice](#) [Search](#)

#### Bibliographic Items

Title Details	# Invoiced / # Paid	Billed	Per Copy	Paid	Detach
<a href="#">The color monster : a pop-up book of feelings / Anna Llenas., by Llenas, Anna, (9781454917298)</a> 1 Ordered, 1 Received, 0 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$11.07, Encumbered \$11.07, Paid \$0.00 <a href="#"># 22847</a> <a href="#">647 7/5/18</a> <a href="#">Juv Patron Holds June 2018</a>	1 / 1	11.07	11.07	11.07	<a href="#">Detach</a>

#### Direct Charges, Taxes, Fees, etc.

Charge Type	Fund	Title / Description	Billed	Paid	Delete
<div><div></div><div>Non-library Item</div><div>Serial Subscription</div><div>Item Price</div><div>Blanket Order</div><div>Processing Fee</div><div>Shipping Charge</div><div>Handling Charge</div><div>Tax</div></div>					<a href="#">Delete</a>
			Total	Total	Balance
			11.07	11.07	0.00

[Save](#) [Save & Clear](#) [Prorate](#) [Close](#)



## Invoice payment method

The invoice payment method allows you to predefine the type(s) of invoices and payment method(s) that you accept. The text that you enter in the admin module will appear as a drop-down menu in the invoice type and payment method fields on the invoice.

To create a new invoice payment method:

1. Select *Invoice Payment Method* from the Acquisitions Administration page.
2. Click *New Invoice Payment Method*.
3. Create a code for the invoice payment method. A code is generally a short but understandable character string.
4. Create a label for the invoice payment method. A label is generally more descriptive than a code.
  - a. No limits exist for the number of characters that can be used in either Invoice Item Type codes or labels.
5. Click **Save**.
6. Payment methods can also be deleted from this screen.

Invoice Payment Method Configuration			
Remove Filters	New Invoice Payment Method	Apply Translations	0 selected
Filter		Filter	
<input type="checkbox"/>	#	<u>Code</u>	<u>Name</u>
<input type="checkbox"/>	1	CASH	Cash
<input type="checkbox"/>	2	CREDIT	Credit
<input type="checkbox"/>	3	Check	Check
<input type="checkbox"/>	4	PO	Purchase Order
<input type="checkbox"/>	5	FOR	FORGIVE

## Providers

### Create a provider

### Add contact and holdings information to providers

### Edit a provider

## Patron Purchase Request

### Request Status

Patron Requests will use the following statuses:

- **New** - This is the initial state for a newly created acquisition request. This is the only state from which a request is editable.
- **Pending** - This is the state after a request is added to a selection list.
- **Ordered, Hold Not Placed** - This is the state when an associated purchase order has been created and the request's Place Hold flag is false.
- **Ordered, Hold Placed** - This is the state when the request's Place Hold flag is true, an associated purchase order has been created, and the bibliographic record and item for the request have been created in the catalog as part of the acquisitions process..
- **Received** - This is the state when the line item on the linked purchase order has been marked as received.
- **Fulfilled** - This is the state when an associated hold request has been fulfilled.
- **Canceled** - This is the state when the acquisition request has been canceled.

## Notifications/Action Triggers

The following email notifications are included with Evergreen, but are disabled by default. The notices can be enabled through the **Notifications/Action Triggers** interface under **Administration** → **Local Administration**. The existing notices could also be modified to place a message in the **Patron Message Center**. Any enabled notifications related to holds placed on requests will also be sent to patrons.

- Email Notice: Acquisition Request created
- Email Notice: Acquisition Request Rejected
- Email Notice: Patron Acquisition Request marked On-Order
- Email Notice: Patron Acquisition Request marked Cancelled
- Email Notice: Patron Acquisition Request marked Received

## Permissions

The following permissions are required to manage patron requests:

- **CLEAR\_PURCHASE\_REQUEST**
  - Allows users to clear completed requests
  - This permission has been added to the stock Acquisitions permission group
  - `user_request.update` will still be required with this sort of action
  - The stock permission mappings for the Acquisitions group will be changed to include this permission
- **CREATE\_PICKLIST**
  - Will allow the staff user to create a selection list.
- **VIEW\_USER**
  - Permission depth will apply to requests. If a user tries to view a patron request that is beyond the scope of their permissions, a permission denied message will appear with a prompt to log in with different credentials.
- **STAFF\_LOGIN**
- `user_request.create`
- `user_request.view`
- `user_request.update`
  - This is checked when updating a request or canceling a request
- `user_request.delete`

**Acquisitions from Item Status**