

KOHA

Acquisitions

Presented by: CSIR-KNOWGATE

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KOHA: Acquisitions

More > Acquisitions

Koha staff client - Mozilla Firefox

File Edit View History Bookmarks Tools Help

18 things that happen on the Internet... x Koha staff client x +

192.168.8.150:8080 Funmoods

Circulation Patrons Search Cart More

kohaadmin | NO LIBRARY SET Help

koha

Enter patron card number Submit

Check out Search the catalog

Home

Warning: You're logged in with the database administrator account. This is a bad idea, and you are likely to encounter problems.

You should create a patron to use when administering Koha and give it superlibrarian permissions.

Circulation

Patrons

Advanced search

Lists

Cataloging

Serials

Acquisitions

Reports

Koha administration

Tools

KOHA: Acquisitions

Koha > Acquisitions - Mozilla Firefox


File Edit View History Bookmarks Tools Help

Koha > Acquisitions +

192.168.8.150:8080/cgi-bin/koha/acqui/acqui-home.pl

Circulation Patrons Search Cart More

kohaadmin | NO LIBRARY SET Help

 Search vendors:

Vendor search Orders search

Home > Acquisitions >

- Late orders
- Suggestions
- Invoices
- Budgets
- Funds
- Currencies

Acquisitions

You must define a budget in Administration


Manage orders

Vendor:

Pending suggestions

2 suggestions waiting. [Manage suggestions.](#)

KOHA: Acquisitions

- ▶ *Setup*
 - ▶ *Budget/Fund Tracking*
 - ▶ *Vendors*
 - ▶ *Managing Suggestions*
 - ▶ *Placing Orders*
 - ▶ *Receiving Orders*
 - ▶ *Invoices*
 - ▶ *Claims & Late Orders*
 - ▶ *Acquisitions Searches*
- 

KOHA: Acquisitions

▶ Setup

- ▶ Budget/Fund Tracking
- ▶ Vendors
- ▶ Managing Suggestions
- ▶ Placing Orders
- ▶ Receiving Orders
- ▶ Invoices
- ▶ Claims & Late Orders
- ▶ Acquisitions Searches

KOHA: Acquisitions

- ▶ *Before using the Acquisitions Module you will want to make sure that you have completed all of the set up*
- ▶ *First, set your Acquisitions System Preferences and Acquisitions Administration to match your library's workflow*
- ▶ *On the main acquisitions page you will see your library's funds listed*

All available funds for Nicole's Library branch

Fund	Owner	Branch	Amount	Ordered	Spent	Avail
FIC	Nicole Engard	Nicole's Library	5,000.00	1,317.81	394.43	3,287.76
NFIC		Nicole's Library	2,500.00	26.00	187.95	2,286.05
Total			7,500.00	1,343.81	582.38	5,573.81

Show all :

- ▶ To see all ac the funds ta
- ▶ To see a hist and it will run a search for you

v all' below
d amount

KOHA: Acquisitions

- ▶ Setup

- ▶ **Budget/Fund Tracking**

- ▶ Vendors

- ▶ Managing Suggestions

- ▶ Placing Orders

- ▶ Receiving Orders

- ▶ Invoices

- ▶ Claims & Late Orders

- ▶ Acquisitions Searches

KOHA: Acquisitions

- ▶ *On the main acquisitions page there will be a table on the right showing you all of your active funds and a breakdown of what has been ordered or spent against them*

All available funds for Nicole's Library branch

Fund	Owner	Branch	Amount	Ordered	Spent	Avail
FIC	Nicole Engard	Nicole's Library	5,000.00	1,317.81	394.43	3,287.76
NFIC		Nicole's Library	2,500.00	26.00	187.95	2,286.05

KOHA: Acquisitions

- ▶ *Clicking on the linked amounts under spent or ordered will show you a summary of the titles ordered on that budget*

Fund: FIC

Spent

Title	Order	Vendor	Invoice	Itemtype	Received	Unit Price	Freight per Item	Date Ordered	Date Received	Subtotal
The tenth circle /	3	1	3456	BK	1	15.00	0.00	02/19/2011	06/11/2011	15.00
Korean-English Dictionary	7	1	12345432		1	10.00	0.00	04/30/2011	08/05/2011	10.00
Harry Potter and the deathly hallows	8	1	2343212	CDBK	1	16.00	0.00	05/25/2011	05/25/2011	16.00
Harry Potter and the deathly hallows	9	1	4567890-9	CDBK	1	15.00	0.00	07/19/2011	07/27/2011	15.00
Practical Open Source Software for Libraries.	10	1	0987654	BK	1	100.00	0.00	07/19/2011	07/19/2011	100.00
Library mashups :	12	1	31143242	BK	1	20.00	0.00	07/27/2011	10/02/2011	20.00
Storm front /	15	1	3245423	BK	1	9.99	0.00	09/07/2011	09/07/2011	9.99
The Waxman murders /	20	3	3121		1	25.99	0.00	11/09/2011	12/13/2011	25.99

KOHA: Acquisitions

- ▶ Setup
- ▶ Budget/Fund Tracking
- ▶ **Vendors**
- ▶ Managing Suggestions
- ▶ Placing Orders
- ▶ Receiving Orders
- ▶ Invoices
- ▶ Claims & Late Orders
- ▶ Acquisitions Searches

KOHA: Acquisitions

Add a Vendor

- ▶ *Before any orders can be placed you must first enter at least one vendor*
- ▶ *To add a vendor click the 'New Vendor' button on the Acquisitions page*

New vendor

Acquisitions

Manage orders

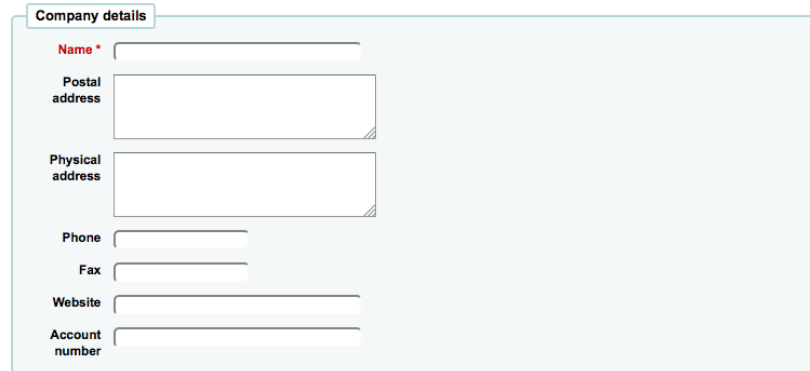
Vendor:

Search

KOHA: Acquisitions

Add a Vendor

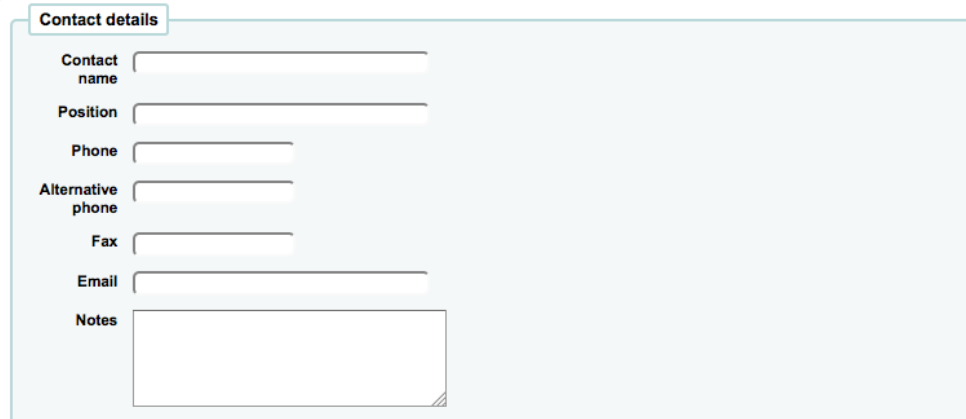
- ▶ *The vendor add form is broken into three pieces:*
 - ▶ The first section is for basic information about the Vendor



The screenshot shows a form titled "Company details" with the following fields:

- Name * (text input)
- Postal address (text input)
- Physical address (text input)
- Phone (text input)
- Fax (text input)
- Website (text input)
- Account number (text input)

- ▶ The second section is for information regarding your contact at the Vendor's office



The screenshot shows a form titled "Contact details" with the following fields:

- Contact name (text input)
- Position (text input)
- Phone (text input)
- Alternative phone (text input)
- Fax (text input)
- Email (text input)
- Notes (text area)

KOHA: Acquisitions

Add a Vendor

- ▶ *The final section is for billing information*

Ordering information

Vendor is: Active Inactive

List prices are

Invoice prices are

Tax Number Registered: Yes No

List prices: Include tax Don't include tax

Invoice prices: Include tax Don't include tax

Discount %

Tax rate % (leave blank for default tax of 0.0%)

Delivery time days

Notes

KOHA: Acquisitions

View/Edit a Vendor

- ▶ *To view a vendor's information page you must search for the vendor from the Acquisitions home page. Your search can be for any part of the Vendor's name:*

You searched on vendor b, 2 results found

Choose a vendor in the list to jump directly to the right place.

Baker & Taylor

New basket

Receive shipment

Basket (#) ▲	Item count ◆	Biblio count ◆	Items expected ◆	Created by ◆	Date ◆	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

bookstore

New basket


Receive shipment

Basket (#) ▲	Item count ◆	Biblio count ◆	Items expected ◆	Created by ◆	Date ◆	
1234t4 (#16)	0	0	0	Nicole Engard	11/09/2011	View

KOHA: Acquisitions

View/Edit a Vendor

- ▶ *From the results, click on the name of the vendor you want to view or edit*

 Edit New Contract Contracts Manage orders ▾

Baker & Taylor

Supplier details

Company Name: Baker & Taylor

Postal Address: PO Box 1234 Bridgewater, NJ 08807-2944

Physical Address: 1120 U.S. 22 Bridgewater, NJ 08807-2944

Phone: 555.555.1234

Fax:

Web site: <http://www.btol.com/>

Contact details

Contact name: Jane Doe

Position: Sales Manager

Phone: 555.555.1233

Alternative phone:

Fax:

Email: jane@btol.com

Notes: On Friday's contact John instead: 555.555.1222

Ordering information

Vendor is: Active

List Prices are: USD

Invoice Prices are: USD

Tax Number Registered: No

List Item Price Includes Tax: No

Invoice Item Price Includes Tax: No

Discount: 0.0000 %

Tax rate: 12%

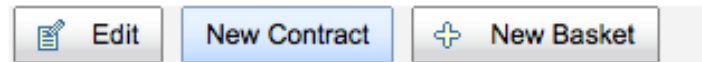
KOHA: Acquisitions

Vendor Contracts- Add a Contract

- ▶ *Here we can define contracts (with a start and end date) and attach them to a vendor*

Add a Contract

- ▶ At the top of a Vendor Information Page, you will see a 'New Contract' button



Baker & Taylor


Order	Order receive	Vendor
Add basket	Receive shipment	Baker & Taylor


- ▶ The contract form will ask for some very basic information about the contract

New contract for Amazon

Name *

Description

Start date * 
(MM/DD/YYYY)

End date * 
(MM/DD/YYYY)

KOHA: Acquisitions

Vendor Contracts- Add a Contract

- ▶ *Once the contract is saved it will appear below the vendor information*

[Edit](#) [New Contract](#) [Manage orders ▼](#)

Baker & Taylor

Supplier details

Company Name: Baker & Taylor

Postal Address: PO Box 1234 Bridgewater, NJ 08807-2944

Physical Address: 1120 U.S. 22 Bridgewater, NJ 08807-2944

Phone: 555.555.1234

Fax:

Web site: <http://www.btol.com/>

Contact details

Contact name: Jane Doe

Position: Sales Manager

Phone: 555.555.1233

Alternative phone:

Fax:

Email: jane@btol.com

Notes: On Friday's contact John instead: 555.555.1222

Ordering information

Vendor is: Active

List Prices are: USD

Invoice Prices are: USD

Discount: 0.0000 %

Contract(s)

Name	Description	Start date	End date	
Fiction for 2010		01/01/2010	12/31/2010	Edit Delete

KOHA: Acquisitions

- ▶ Setup
- ▶ Budget/Fund Tracking
- ▶ Vendors

▶ **Managing Suggestions**

- ▶ Placing Orders
- ▶ Receiving Orders
- ▶ Invoices
- ▶ Claims & Late Orders
- ▶ Acquisitions Searches

KOHA: Acquisitions

- ▶ *Depending on your settings in the suggestion system preference, patrons may be able to make purchase suggestions via the OPAC*
- ▶ *When a suggestion is waiting for library review, it will appear on the Acquisitions home page under the vendor search*

Pending suggestions

6 suggestions waiting. [Manage suggestions.](#)

- ▶ *It will also appear on the main staff dashboard under the module labels:*

Suggestions pending approval: **6**

Comments pending approval: **1**

Tags pending approval: **3**

KOHA: Acquisitions

- ▶ *Clicking 'Manage suggestions' will take you to the suggestion management tool*
- ▶ *If there are no pending suggestions you can access the suggestion management tool by clicking the 'Manage suggestions' link on the menu on the left of the Acquisitions page*

Suggestions management

Accepted (1) Pending (4) Checked (2) Ordered (1) Rejected (1)

Check all | Uncheck all

	Suggestion	Suggested by /on	Managed by /on	Library	Budget	Status
<input type="checkbox"/>	The Reader's digest. [edit] ; Published by The Reader's Digest Association]	Engard, Nicole	Engard, Nicole			Accepted (Bestseller)

Mark selected as: with this reason: OR: Delete selected

Submit

KOHA: Acquisitions

- ▶ *For libraries with lots of suggestions, there are filters on the left hand side of the Manage Suggestions page to assist in limiting the number of titles displayed on the screen*

Organize by:

Filter by: [clear]

Bibliographic
information

Suggestion information

Acquisition information

- ▶ Clicking on the blue headings will expand the filtering options and clicking '[clear]' will clear all filters and show all suggestions

Organize by:

Filter by: [clear]

Bibliographic
information

Suggestion information

Acquisition information

Book fund:

For:

Any
Centerville
Fairfield
Fairview
Franklin
Goleta Public Library
Liberty
Midway
Nicole's Library
Pleasant Valley
Riverside
Springfield
Troy
Union

KOHA: Acquisitions

- ▶ *Another option for libraries with long lists of suggestions is to approve or reject suggestions one by one by clicking on the title of the suggestion to open a summary of the suggestion, including information if the item was purchase*

Bibliographic information

Title: Practical Open Source Software for Libraries
Author: Nicole C. Engard
Copyright date: 2010
ISBN or ISSN or other standard number: unknown
Publisher: Chandos
Publication place: UK
Collection title: Test
Document type:
Reason for suggestion:
Notes: As the author of this book I have to recommend it.

Suggestion management

Status: No Status

	Date	By
Suggestion creation	04/01/2011	Engard, Nicole NIC (Staff)
Suggestion management	05/22/2012	Engard, Nicole NIC (Staff)
Suggestion accepted	09/07/2011	Engard, Nicole NIC (Staff)

Acquisition information

Library: Nicole's Library
Budget: Non Fiction
Copies: 2
Currency: USD
Price: 99.00
Total: 198.00

[<<Back to the list](#)

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KOHA: Acquisitions

Create a basket

- ▶ *To place an order you must first search for the vendor or bookseller you want to send the order to*
- ▶ *To create a basket you must first search for the vendor you're ordering from:*

[Baker & Taylor](#)

New basket

Receive shipment

Basket (#) ▲	Item count ◆	Biblio count ◆	Items expected ◆	Created by ◆	Date ◆	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

KOHA: Acquisitions

Create a basket

- ▶ *Next to the vendor name you will see a 'New Basket' button*

Add a basket to Amazon

Basket name

Billing Place:

Delivery Place:

Vendor

Internal note

Vendor note

Add a basket to Baker & Taylor

Basket name

Billing Place:

Delivery Place:

Vendor

Internal note

Vendor note

Contract

- ▶ *If you are adding items to the vendor from Baker & Taylor, you will also have an option to choose which contract you're ordering these items under*

KOHA: Acquisitions

Create a basket

- ▶ *After Click 'Save':*

Edit basket Delete this basket Export this basket as CSV

Basket 29118281 (35) for Amazon

Billing place: Nicole's Library

Managed by: Nicole Engard

Opened on: 09/28/2012

Show all details

Order Details

Basket empty

Add order to basket

- From an existing record: Search
- From a suggestion
- From a new (empty) record
- From an external source
- From a staged file

- ▶ *Once your basket is created you are presented with several options for adding items to the order*

KOHA: Acquisitions

Create a basket

- ▶ *If you are ordering another copy of an existing item, you can simply search for the record in your system*

Search existing records

3 results found

Summary	Publisher	Copyright		
Library mashups : 9781573873727 (pbk.) 1573873721 (pbk.) - xvii, 334 p. : ; 23 cm.	Information Today, Inc., ; Medford, N.J. :	2009	View MARC	Order
Piping out Library Data by Engard, Nicole C., : Test ; 8			View MARC	Order
Tu shu guan "hun da" : by Engard, Nicole C., 9787562459835 7562459835 - 294 p. : : Ying wen ti ming qu zi ban quan ye. ; 23 cm.	Chongqing da xue chu ban she, ; Chongqing :	2011	View MARC	Order

Add order to basket

- From an existing record:
- From a suggestion
- From a new (empty) record
- From an external source
- From a staged file

KOHA: Acquisitions

Create a basket

- ▶ From the results, simply click 'Order' to be brought to the order form

New order

Basket details

Managed by: Nicole Engard

Open on: 11/09/2011

Catalog details [Edit record](#)

Title Library mashups :

Author:

Publisher: Information Today, Inc.,

Edition:

Publication year: 2009

ISBN: 9781573873727 (pbk.) | 1573873

Series:

- ▶ *If you allow patrons to make purchase suggestions (learn more in the Managing Suggestions section of this manual), then you can place orders from those suggestions*

KOHA: Acquisitions

Create a basket

- ▶ If you allow patrons to make purchase suggestions (learn more in the Managing Suggestions section of this manual), then you can place orders from those suggestions

Suggestions

Suggestion	Suggested by	Accepted by	
Changes - Jim Butcher copy. year:2011 ISBN :0451463471 published by:Roc	Engard, Nicole	Engard, Nicole	Order
The Reader's digest. - published by:The Reader's Digest Association]	Engard, Nicole	Engard, Nicole	Order

Showing 1 to 2 of 2

KOHA: Acquisitions

Create a basket

- From the results, click 'Order' next to the item you want to order and you will be presented with the order form including a link to the suggestion

New order

Basket details

Managed by: Nicole Engard
Open on: 05/03/2012

Catalog details

Title: Practical Open Source Software for Libraries
Author: Nicole C. Engard
Publisher: Chandos
Edition:
Publication year: 2010
ISBN:
Series:

Suggestion

Suggested by: Engard, Nicole (suggestion #3)

- When the item appears in your basket it will include a link to the suggestion

Order (new)	00.00		1	00.00			
Practical Open Source Software for Libraries by Nicole C. Engard Chandos Suggested by: Engard, Nicole (suggestion #3) [add note]	00.00	00.00	1	00.00	Non Fiction	Modify	Delete order and catalog record
Order	PRP	Est	Qty	Total	Fund	Modify	Delete

Order Details

Opened on: 05/03/2012
Managed by: Nicole Engard

Basket suggest (2) for Amazon

KOHA: Acquisitions

Create a basket

- ▶ *To order from a record that can't be found anywhere else, choose the 'From a new (empty) record'*

New order

Basket details

Managed by: Nicole Engard

Open on: 11/09/2011

Catalog details

Title:

Author:

Publisher:

Edition:

Publication year:

ISBN:

Series:

KOHA: Acquisitions

Create a basket

- ▶ *If you want to search other libraries for an item to purchase, you can use the 'From an external source' option that will allow you to order from a MARC record found via a Z39.50 search*

Z39.50 Search Points

Title: <input type="text"/>	Author: <input type="text"/>
ISBN/ISSN: <input type="text"/>	Subject Heading: <input type="text"/>
LC Call Number: <input type="text"/>	Dewey: <input type="text"/>
Select used MARC framework: <input type="text" value="Default"/>	

Search targets [Select All](#) [Clear All](#)

- NEW YORK UNIVERSITY LIBRARIES [bobcat.nyu.edu]
- NEW YORK PUBLIC LIBRARY [catnyp.nyp.org]
- COLUMBIA UNIVERSITY [clio-db.cc.columbia.edu]
- SMITHSONIAN INSTITUTION LIBRARIES [siris-libraries.si.edu]
- LIBRARY OF CONGRESS [z3950.loc.gov]

[Cancel](#)

- ▶ From the purchase


you want to

Results

Server	Title ▾	Author ◆	ISBN ◆	LCCN ◆	Preview
LIBRARY OF CONGRESS	Change of heart :	Picoult, Jodi,	9780743496742 0743496744	2007035721	MARC Card Order

KOHA: Acquisitions

Create a basket group

- ▶ *A basket group is simply a group of baskets*
 - ▶ *In some libraries, you have several staff members that create baskets, and, at the end of a period of time, someone then groups them together to send to the vendor in bulk*
- 

KOHA: Acquisitions

Printing basket

- ▶ *When you are finished adding items to your basket, click 'Close this Basket'*

Edit basket header information Delete this basket **Close this basket** Export this basket as CSV

Basket Fiction Order (17) for [Borders](#)

Basket details

Managed by: Nicole Engard

Opened on: 05/01/2010

Order Details

Order	RRP	Est.	Qty.	Total	Fund
Practical Open Source Software for Libraries by Nicole C. Engard	10.00	10.00	1	10.00	Fiction
Total Tax Exc.	10.00		1	10.00	

- ▶ *You will be asked if you want to create a purchase order at this time*

Are you sure you want to close basket Fiction Order?

create a purchase order now?

Yes, Close (Y) No, Don't Close (N)

KOHA: Acquisitions

Printing basket

- ▶ *Your completed order will be listed on the Basket Grouping page for printing or further modification*

Basket Grouping for Borders

Opened Closed

another
Reopen Print

Basket Group n°4
Reopen Print

Fiction Order
Reopen Print

- ▶ *Clicking 'Print' below your order will generate a PDF for printing, which will have all of your library information followed by the items in your order*

Basket (N°)	Document	Qty	RRT GST Inc.	Discount	Discount price GST Exc.	GST	Total GST Inc.
17	Practical Open Source Software for Libraries / Nicole C. Engard,	1	10.00	0.00%	9.99	0.12%	10.00

KOHA: Acquisitions

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- ▶ Invoices
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- ▶ Acquisitions Searches

KOHA: Acquisitions

- Orders can be received from the vendor information page

Baker & Taylor

Vendor details

Company name: Baker & Taylor

Postal address:

Position:

- or the vendor search results page

Baker & Taylor

[New basket](#) [Receive shipment](#)

Basket (#)	Item count	Biblio count	Items expected	Created by	Date	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

KOHA: Acquisitions

- ▶ *After clicking 'Receive shipment' you will be asked to enter a vendor invoice number, a shipment received date, a shipping cost and a budget to subtract that shipping amount from*

Receive shipment from vendor Amazon

Receive a new shipment

Vendor invoice:

Shipment date: 
(MM/DD/YYYY)

Shipment cost:

Budget:

- ▶ *The receive page will list all items still on order with the vendor regardless of the basket the item is from*

KOHA: Acquisitions

- The receive page will list all items still on order with the vendor regardless of the basket the item is from

Receipt summary for Amazon [8765432] on 05/22/2012

Invoice number: 8765432 Received by: nce On: 05/22/2012

Pending orders

Basket	Order line	Summary	View record	Quantity	Unit cost	Order cost		
5	6	Korean-English Dictionary Note: order note [Change note]	MARC Card	1	10.00	10.00	Receive	Delete order Delete order and catalog record
26	106	My sister's keeper : by Picoult, Jodi, – 0743454537 (pbk.) 9780743454 [Add note]	MARC Card	2	11.00	22.00	Receive	Delete order Can't delete order and catalog record 2 item(s) left
27	108	Change of heart : by Picoult, Jodi, – 9780743496759 0743496752 : P Note: Originally published: New York : Atria Books, 2008. [Change note]	MARC Card	2	11.00	22.00	Receive	Delete order Can't delete order and catalog record 1 item(s) left
29	113	The Avengers. [Add note]	MARC Card	2	6.50	13.00	Receive	Delete order Delete order and catalog record
29	114	Harry Potter and the goblet of fire by Rowling, J. K. – 0807282596 [Add note]	MARC Card	1	17.99	17.99	Receive	Delete order Can't delete order and catalog record 5 item(s) left 1 order(s) left 1 hold(s) left
TOTAL				8		84.99		

Already received

There are no received orders.

Finish receiving

KOHA: Acquisitions

- ▶ *To receive a specific item, click the 'Receive' link to the right of the item* **Receive items from : Baker & Taylor [5322312] (order #28)**

Catalog details

Title: Seer of Sevenwaters /
Author: Marillier, Juliet.
Copyright: 2010
ISBN: 0451463552 : HRD
Series:

Accounting details

Date received: 07/10/2012
Budget: Fiction
Created by: Nicole Engard
Quantity to receive:
Quantity received:
Replacement cost:
Budgeted cost:
Actual cost:
Notes:

Items

Receive?		Barcode	Home branch	Holding branch	Not for loan	Restricted
<input checked="" type="checkbox"/>	Edit		Midway	Midway	Ordered	

KOHA: Acquisitions

- Once you have made any changes necessary (to the order and/or items, click 'Save' to mark the item(s) as received

Already received

Basket	Order line	Summary	View record	Quantity	Est cost	Actual cost	TOTAL
29	31	The Judas Gate /	MARC Card	1	16.17	16.00	16.00
29	36	Seer of Sevenwaters /	MARC Card	1	14.97	14.97	14.97
SUBTOTAL						30.97	30.97
TOTAL				2			30.97

Finish receiving

- You will also see that the item is received and/or cancelled if you view the basket

Basket 2011-02-21 (2) for Amazon

Managed by: Nicole Engard

Opened on: 02/19/2011

Order Details

Order	RRP	Est.	Qty.	Total	Fund	Modify	Delete
(rcvd) The tenth circle / by Picoult, Jodi, - 074349671X (pbk.) 9780743496 , Washington Square Press, Note: Includes readers club guide (p.[6]-[20]). [Change note]	15.00	15.00	1	15.00	Fiction	Modify	Delete order Can't delete order and catalog record 2 item(s) left
Total (USD)	15.00		1	15.00			

Cancelled orders

Order	RRP	Est.	Qty.	Total	Fund
Korean-English Dictionary by Records generated from Project Gutenberg RDF data. ISO 639-2 language code: , Project Gutenberg Literary Archive Foundation,	5.00	5.00	1	5.00	Fiction
<i>Deleted bibliographic record, can't find title</i>	14.00	14.00	1	14.00	Fiction

KOHA: Acquisitions

- ▶ Setup
- ▶ Budget/Fund Tracking
- ▶ Vendors
- ▶ Managing Suggestions
- ▶ Placing Orders
- ▶ Receiving Orders
- ▶ **Invoices**
- ▶ Claims & Late Orders
- ▶ Acquisitions Searches

KOHA: Acquisitions

- ▶ *When orders are received invoices are generated. Invoices can be searched by clicking on 'Invoices' in the left of the Acquisitions page*

Search filters

Invoice no:

Supplier:
All ▾

Shipment date

From:

To:

Billing date

From:

To:

ISBN / EAN / ISSN:

Title:

Author:

Publisher:

Publication year:

Branch:
All ▾

Invoices

Use the search form

KOHA: Acquisitions

- ▶ *After searching, your results will appear to the right of the search options*

Invoices

Invoice no. ▲	Vendor ◆	Billing date ◆	Received biblios ◆	Received items ◆	Status ◆	
654321123	Amazon		1	1	Open	Details / Close

- ▶ *From the results you can click the 'Details' link to see the full invoice or 'Close' to note that the invoice is closed/paid for*

Invoice: 654321123

Supplier: Amazon

Shipment date:	<input type="text" value="10/13/2012"/>	
Billing date:	<input type="text"/>	
Shipment cost:	<input type="text" value="5.00"/>	Budget: <input type="text" value="Book"/>
Status: Open.		
<input type="checkbox"/> Close		
<input type="button" value="Save"/>		

[Go to receipt page](#)

Invoice details

Summary ▲	Publisher ◆	Branch ◆	RRP ◆	Est. ◆	Qty. ◆	Total ◆	Fund ◆
The accidental library manager / by Gordon, Rachel Singer.			11.00	11.00	1	11	Professional Development
Total Tax Exc.			11.00		1	11.00	
Tax (0.00%)			0.00			0.00	
Total Tax Inc. (USD)			11.00		1	11.00	
Total + Shipment cost (USD)					1	16.00	

KOHA: Acquisitions

- ▶ Setup
- ▶ Budget/Fund Tracking
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- ▶ Managing Suggestions
- ▶ Placing Orders
- ▶ Receiving Orders
- ▶ Invoices

▶ **Claims & Late Orders**


- ▶ Acquisitions Searches


KOHA: Acquisitions

- ▶ Upon clicking on the link to '**Late Orders**' from the Acquisitions page you will be presented with a series of filter options on the left hand side
- ▶ These filters will be applied only closed baskets
- ▶ Once you filter your orders to show you the things you consider to be late you will be presented with a list of these items

Filter Results:

Order date:
 days ago

Estimated Delivery date from:
 
 (MM/DD/YYYY)

To:
 
 (MM/DD/YYYY)

Vendor:

Late orders

Claim using notice:

Order date	Estimated delivery date	Vendor	Information	Total cost	Basket	Claims count	Claimed date	
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	The lost gate : Author: Card, Orson Scott. Published by: Tor,	5.99x2 = 11.98 Fiction	24 NIC	0		<input type="checkbox"/>
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	The lost gate : Author: Card, Orson Scott. Published by: Tor,	24.99x1 = 24.99 Fiction	24 NIC	0		<input type="checkbox"/>
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	To have and to kill / Author: Clark, Mary Jane Behrends. Published by: William Morrow,	24.99x1 = 24.99 Fiction	24 NIC	0		<input type="checkbox"/>
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	The Waxman murders / Author: Doherty, P. C. Published by: Minotaur Books,	25.99x1 = 25.99 Fiction	24 NIC	0		<input type="checkbox"/>

KOHA: Acquisitions

- ▶ *If you would rather use a different acquisition claim letter (other than the default) you can create that in the notices module and choose it from the menu above the list of late items*

Claim using notice: Acquisition Claim

Order Date	Acquisition Claim	Vendor
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KOHA: Acquisitions

- ▶ Setup
- ▶ Budget/Fund Tracking
- ▶ Vendors
- ▶ Managing Suggestions
- ▶ Placing Orders
- ▶ Receiving Orders
- ▶ Invoices
- ▶ Claims & Late Orders
- ▶ **Acquisitions Searches**

KOHA: Acquisition

- ▶ At the top of the various Acquisition pages there is a quick search box where you can perform either a Vendor Search or an Order Search

Search vendors:

- ▶ In the Vendor Search **Vendor search** Orders search vendor name to get results

Search vendors:

Vendor search Orders search

Vendor b

New vendor

You searched on vendor b, 2 results found

Choose a vendor in the list to jump directly to the right place. Baker & Taylor

Baker & Taylor

New basket

Receive shipment

Basket (#)	Item count	Biblio count	Items expected	Created by	Date	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

KOHA: Acquisition

- ▶ *Using the Orders Search you can search for items that have been ordered with or without the vendor*

Search orders:

Title: Vendor: [+]
[Submit] [Advanced search](#)

[Vendor search](#) **[Orders search](#)**

- ▶ *You can enter info in one or both fields and you can enter any part of the title and/or vendor name*

Search orders:

Title: Vendor: [+]
[Submit] [Advanced search](#)

[Vendor search](#) **[Orders search](#)**

Search results

Search results

Showing 1 to 9 of 9 Show entries

Basket	Basket group	Invoice number	Order number	Summary	Vendor	Placed on	Received on	Quantity ordered	Unit cost
20110728 (10)	20110728 (1)	31143242	11	Social software in libraries : Farkas, Meredith G., 9781573872751 (pbk.) 1573872	Amazon	07/27/2011	10/02/2011	2	34.00
20110728 (10)	20110728 (1)	31143242	12	Library mashups : 9781573873727 (pbk.) 1573873	Amazon	07/27/2011	10/02/2011	1	25.00
3 (27)	()	2121	109	Practical open source software for libraries / Engard, Nicole C., 9781843345855 1843345854	Amazon	03/19/2012	03/19/2012	1	99.00

KOHA: Acquisition

- ▶ Clicking the plus sign to the right of the Vendor search box will expand the search and allow you to search for additional fields

Search orders:

Title: Vendor: [-] [Advanced search](#)

Basket: Invoice no.:

- ▶ Clicking Advance search options available of the order

Search Orders

Title:

Author:

ISBN:

Vendor:

Basket:

Bookseller invoice no:

From:
(MM/DD/YYYY)

To:
(MM/DD/YYYY)

Thanks

