KOHA: Acquisitions

More > Acquisitions

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.
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
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

To see all active funds you can click the checkbox next to 'Show all' below the funds table

To see a history of all orders in a fund you can click on the linked amount and it will run a search for you
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.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Owner</th>
<th>Branch</th>
<th>Amount</th>
<th>Ordered</th>
<th>Spent</th>
<th>Avail</th>
</tr>
</thead>
<tbody>
<tr>
<td>FIC</td>
<td>Nicole Engard</td>
<td>Nicole's Library</td>
<td>5,000.00</td>
<td>1,317.81</td>
<td>394.43</td>
<td>3,287.76</td>
</tr>
<tr>
<td>NFIC</td>
<td>Nicole's Library</td>
<td>2,500.00</td>
<td>26.00</td>
<td>187.95</td>
<td></td>
<td>2,286.05</td>
</tr>
</tbody>
</table>
KOHA: Acquisitions

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

<table>
<thead>
<tr>
<th>Fund: FIC</th>
<th>Spent</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td><strong>Order</strong></td>
</tr>
<tr>
<td>The tenth circle /</td>
<td>3</td>
</tr>
<tr>
<td>Korean-English Dictionary</td>
<td>7</td>
</tr>
<tr>
<td>Harry Potter and the deathly hallows</td>
<td>8</td>
</tr>
<tr>
<td>Harry Potter and the deathly hallows</td>
<td>9</td>
</tr>
<tr>
<td>Practical Open Source Software for Libraries.</td>
<td>10</td>
</tr>
<tr>
<td>Library mashups :</td>
<td>12</td>
</tr>
<tr>
<td>Storm front /</td>
<td>15</td>
</tr>
</tbody>
</table>
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.
KOHA: Acquisitions

Add a Vendor

- The vendor add form is broken into three pieces:
  - The first section is for basic information about the Vendor
    - Company details
      - Name
      - Postal address
      - Physical address
      - Phone
      - Fax
      - Website
      - Account number
  - The second section is for information regarding your contact at the Vendor’s office
    - Contact details
      - Contact name
      - Position
      - Phone
      - Alternative phone
      - Fax
      - Email
      - Notes
KOHA: Acquisitions

Add a Vendor

- The final section is for billing information
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:
KOHA: Acquisitions

View/Edit a Vendor

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

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%
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.

- The contract form will ask for some very basic information about the contract.
KOHA: Acquisitions

Vendor Contracts- Add a Contract

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Start date</th>
<th>End date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fiction for 2010</td>
<td></td>
<td>01/01/2010</td>
<td>12/31/2010</td>
</tr>
</tbody>
</table>
KOHA: Acquisitions

- Setup
- Budget/Fund Tracking
- Vendors

**Managing Suggestions**

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

It will also appear on the main staff dashboard under the module labels:
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.
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.

- Clicking on the blue headings will expand the filtering options and clicking ’[clear]’ will clear all filters and show all suggestions.
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.
KOHA: Acquisitions

- Setup
- Budget/Fund Tracking
- Vendors
- Managing Suggestions

- **Placing Orders**
  - Receiving Orders
  - Invoices
  - Claims & Late Orders
  - Acquisitions Searches
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:

<table>
<thead>
<tr>
<th>Basket (#)</th>
<th>Item count</th>
<th>Biblio count</th>
<th>Items expected</th>
<th>Created by</th>
<th>Date</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO12342212 (#14)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Nicole Engard</td>
<td>11/09/2011</td>
<td>View</td>
</tr>
<tr>
<td>PO123423 (#24)</td>
<td>27</td>
<td>26</td>
<td>27</td>
<td>Nicole Engard</td>
<td>03/11/2012</td>
<td>closed on 03/11/2012</td>
</tr>
<tr>
<td>PO39092190 (#15)</td>
<td>25</td>
<td>24</td>
<td>21</td>
<td>Nicole Engard</td>
<td>11/09/2011</td>
<td>View</td>
</tr>
<tr>
<td>PO647938224 (#18)</td>
<td>25</td>
<td>25</td>
<td>25</td>
<td>Nicole Engard</td>
<td>11/19/2011</td>
<td>View</td>
</tr>
</tbody>
</table>
KOHA: Acquisitions
Create a basket

- Next to the vendor name you will see a ‘New Basket’ button

- If you have added contracts to the vendor you’re ordering from, you will also have an option to choose which contract you’re ordering these items under.
After Click ‘Save’: 

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.
From the results, simply click ‘Order’ to be brought to the order form.

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.
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.
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.

When the item appears in your basket it will include a link to the suggestion.
To order from a record that can’t be found anywhere else, choose the ‘From a new (empty) record’
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.

From the results, click the Order link next to the item you want to purchase.
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
When you are finished adding items to your basket, click ‘Close this Basket’.

You will be asked if you want to create a purchase order at this time.
KOHA: Acquisitions

Printing basket

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

```
<table>
<thead>
<tr>
<th>Basket (N°)</th>
<th>Document</th>
<th>Qty</th>
<th>RRT GST Inc.</th>
<th>Discount</th>
<th>Discount price GST Exc.</th>
<th>GST</th>
<th>Total GST Inc.</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Practical Open Source Software for Libraries / Nicole C. Engard,</td>
<td>1</td>
<td>10.00</td>
<td>0.00%</td>
<td>9.99</td>
<td>0.12%</td>
<td>10.00</td>
</tr>
</tbody>
</table>
```

- 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.
KOHA: Acquisitions

- Setup
- Budget/Fund Tracking
- Vendors
- Managing Suggestions
- Placing Orders
- **Receiving Orders**
  - Invoices
  - Claims & Late Orders
  - Acquisitions Searches
• Orders can be received from the vendor information page

• or the vendor search results page
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.

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

### KOHA: Acquisitions

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

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

**Pending orders**

<table>
<thead>
<tr>
<th>Basket</th>
<th>Order line</th>
<th>Summary</th>
<th>View record</th>
<th>Quantity</th>
<th>Unit cost</th>
<th>Order cost</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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, – 0743456537 (pbk.) | MARC | Card | 2 | 11.00 | 22.00 | Receive  
Delete order  
Can't delete order and catalog record  
2 item(s) left |
| 27     | 106        | Change of heart: by Picoult, Jodi, – 9780743496759 | 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 |

**Already received**

There are no received orders.

**Finish receiving**
To receive a specific item, click the ‘Receive’ link to the right of the item.
Once you have made any changes necessary (to the order and/or items, click ‘Save’ to mark the item(s) as received

You will also see that the item is received and/or cancelled if you view the basket.
KOHA: Acquisitions

- Setup
- Budget/Fund Tracking
- Vendors
- Managing Suggestions
- Placing Orders
- Receiving Orders

Invoices

- Claims & Late Orders
- Acquisitions Searches
When orders are received invoices are generated. Invoices can be searched by clicking on ‘Invoices’ in the left of the Acquisitions page.
After searching, your results will appear to the right of the search options.

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.
KOHA: Acquisitions

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

- Claims & Late Orders
- Acquisitions Searches
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.

### Late orders

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

- In the Vendor Search, you can enter any part of the vendor name to get results.

You searched on vendor b, 2 results found

Choose a vendor in the list to jump directly to the right place. [Baker & Taylor]
Using the Orders Search you can search for items that have been ordered with or without the vendor.

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

- Clicking Advanced Search to the right of the search button will give you all of the order search options available.

![Search orders interface with fields for Title, Vendor, Basket, Invoice no., and search options for Vendor search and Orders search.]
Thanks