Acquisitions: Getting Started

These worksheets will assist you in gathering the information required to set up the Acquisitions Module.

Library Name:	
FUNDS Check the boxes of the sources from which you Municipal Government Provincial Government Public Library Services Branch Federal Government Regional District	u receive collection funding for the year Capital Funds Donations Fundraising Friends of the Library Other:
List your specific Yearly Collection Funding So	urces below and the amount of funding you receive
FUNDING SOURCES WORKSHEET	
ie. City of Fiction	\$ 275 654.78
1	
2	<u>\$</u>
3	\$.
4	\$
5	
6	
7	
8	s
9	
10	
	ding for 2015 \$

COLLECTION FUNDS WORKSHEET

- 1. List your Funds.
- 2. Create a code for each fund.
- 3. Assign a percentage of your total funding to each fund. (Your percentages must add up to 100%)
- 4. List the Funding Source(s) for each fund.
- 5. Calculate the dollar amount to be allocated to each fund from the Funding Source(s).

Code	Fund Name	Percentage	Dollar Amount	Funding Source(s)
ANF	Adult Non-Fiction	10.00%	\$27 565.48	City of Fiction
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
		%	\$	
	Total	100.00%	\$	

CLAIM POLICIES WORKSHEET

All claiming in Evergreen is currently manual. Libraries can setup claim policies to alert them when an item is claim ready.

Claim Policy Name:Period to wait until you make Claim:	
Method of Contact:	
Claim Policy Name:	
Period to wait until you make Claim:	
Method of Contact:	
Claim Delieu Neme	
Claim Policy Name:	
Period to wait until you make Claim:	
Method of Contact:	

PROVIDERS (VENDORS) WORKSHEET

List all vendors you purchase collection materials from.

Provider (Vendor) Name of Provider:		
Name of Contact:	EDI Account (cir	cle): yes/ no
E-mail:	SAN (Standard A	Address Number):
Phone:	Currency:	
Fax:	Ordering Discou	nt:
Types of Materials Ordered:		
□ books	□ music CDs	□ games
□ magazines	□ playaways	□ story boxes
□ DVDs	□ audiobooks	□ other:
□ VHS	□ electronic books	
Default # of Copies		
Default Claiming Policy:		
Ordering Frequency: ☐ All the time ☐ Quite often ☐	A few times a year □ Only specia	I orders □ Last time I ordered?

Congratulations, now that you have gathered all the necessary information you are ready to set up the Acquisitions Module in Evergreen.

For specific Evergreen instructions see the <u>Sitka Evergreen Aquisitions Manual: Part III Administration</u>

Name of Contact:	EDI Account (cir	rcle): yes/ no
	SAN (Standard A	Address Number):
E-mail:		
Phone:	Currency:	
Fax:	Ordering Discou	nt:
Types of Materials Ordered: □ books □ magazines □ DVDs □ VHS	☐ music CDs☐ playaways☐ audiobooks☐ electronic books	□ games □ story boxes □ other:
Default # of Copies		
Default Claiming Policy:		
Ordering Frequency:	A face time a conserver of Only an acial a	
☐ All the time ☐ Quite often ☐ /	A few times a year □ Only special o	orders □ Last time I ordered
□ All the time □ Quite often □ . Provider (Vendor)		
□ All the time □ Quite often □ . Provider (Vendor) Name of Provider:	EDI Account (cir	
Provider (Vendor) Name of Provider: Name of Contact: E-mail:	EDI Account (cir	rcle): yes/ no
□ All the time □ Quite often □ All the time □ All the time □ Quite often □ All the time □ All the time □ All the time □ Quite often □ All the time □ Quite often □ All the time □ Quite often □ All the time □ All the time □ Quite often □ All the time □ All th	EDI Account <i>(cir</i> SAN (Standard A	rcle): yes/ no Address Number):
Provider (Vendor) Name of Provider: Name of Contact: E-mail: Phone:	EDI Account <i>(cir</i> SAN (Standard A	rcle): yes/ no Address Number):
Provider (Vendor) Name of Provider: Name of Contact: E-mail: Phone: Types of Materials Ordered: books magazines DVDs	EDI Account (cires SAN (Standard A Currency: Currency: Ordering Discou	rcle): yes/ no Address Number): nt: □ games □ story boxes