

## Pre Acquisitions Survey

Please return this survey to [YOUR EMAIL HERE](#) by 5pm September 5, 2014.

**Library Name:**

**Primary Acquisitions Contact:** *(Please include name, role, and contact information.)*

### General Library Information

**Population Served:**

**Approximate Number of Items purchased per year:**

**Approximate overall yearly purchasing budget:**

**Approximate number of collections/funds:**

**Number of Acquisitions Staff:**

### Current Acquisitions

Please check the appropriate boxes.

Feature	Performed in Legacy System	Performed Manually	Not Performed
Track funding sources			
Track funds			
Provider profiles			
Create selection lists			
Create purchase orders			
Activate purchase orders			
Submit purchase orders			
Cancel items			
Claim items			
Receive items			
Receive invoices			
Record invoices			

## Staff Permissions

Four permission groups are available to be applied to Acquisitions staff. Review the permission groups here: <http://docs.sitka.bclibraries.ca/Acq/current/html/acq-permissions-overview.html>

Please indicate below what levels of permission each of your acquisitions staff will require.

**Acquisitions Admin** – Includes permissions to create and edit funding sources, funds, and providers. Also includes all permissions granted to Purchasers and Selectors.

<i>Name</i>	<i>Role</i>	<i>Barcode</i>
_____	_____	_____

**Purchasers** – Includes permissions to create purchase orders, cancel purchase orders, receive purchase orders, and create invoices. Also includes all permissions granted to Selectors.

<i>Name</i>	<i>Role</i>	<i>Barcode</i>
_____	_____	_____

**Basic Selectors** – Includes permissions to create selection lists, add line items to selection lists, perform MARC Federated Searches, and create brief MARC records.

<i>Name</i>	<i>Role</i>	<i>Barcode</i>
_____	_____	_____

**Advanced Selectors** – Includes Basic Selectors permissions as well as the ability to view fund balances, edit funds, and transfer money between funds. Please indicate which, if any, Selectors require this permission.

<i>Name</i>	<i>Role</i>	<i>Barcode</i>
_____	_____	_____

## Other Important Information

Does your library currently create any temporary barcodes? If so, what format do you use?

Does your library have any barcodes that are prefixed by your library code? If yes, please briefly explain the circumstances.

Please list all currencies used for purchases:

Does your library purchase any shelf-ready items? If so, please describe what that means for your library. (ie. Spine labels, processing, barcodes)

## EDI (Electronic Data Interchange)

EDI is available for use with some vendors. EDI requires your library to have a SAN (Standard Address Number). Does your library have a SAN? If so, what is it?

## Training Schedule – Potential Dates

Please ensure that the relevant staff will be available during the following time periods for training.

Specific dates and times for training will be confirmed in September.

### **Acquisitions Administration Training** – between November 3<sup>rd</sup> and November 7<sup>th</sup> 2014

This is a 90 minute session cover the initial set up of the acquisitions module and ongoing administration of acquisitions. This session is intended for those staff who will be granted Acquisitions Administrative permissions.

### **Acquisitions Selection Training** – between December 8<sup>th</sup> and December 12<sup>th</sup> 2014

This is a 90 minute session covering the different methods of selection, lists and the many ways to add line items to selection lists. This session is intended for those staff who will be doing selection.

### **Acquisitions Ordering Training** – between January 12<sup>h</sup> and January 16<sup>th</sup> 2015

This is a 90 minute session covering purchase orders, vandelay, cancelling, and claiming. This session is intended for those staff who will be creating and activating orders, as well as cancelling and claiming line items.

### **Acquisitions Receiving and Invoicing Training** – between January 26<sup>th</sup> and February 30<sup>th</sup> 2015

This is a 90 minute session covering receiving item, un-receiving items, creating invoices for bibliographic and non-bibliographic items, and prorating charges. This session is intended for those staff who will be receiving and/or invoicing for line items.

### **Acquisitions Follow Up Training** – between February 23<sup>th</sup> and February 27<sup>th</sup> 2015

This is a 45 minute session following up on any additional questions about acquisitions that may have arisen after using the acquisitions module for 2 months. This session is intended for any interested acquisitions staff.

Staff are encouraged to take a look at the Acquisitions User Manual ahead of the training sessions - <http://docs.sitka.bclibraries.ca/Acq/current/html/>