

Acquisitions: Getting Started

For Multi-Branch Systems

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 receive collection funding for the year

- | | |
|---|--|
| <input type="checkbox"/> Municipal Government
<input type="checkbox"/> Provincial Government
<input type="checkbox"/> Public Library Services Branch
<input type="checkbox"/> Federal Government
<input type="checkbox"/> Regional District | <input type="checkbox"/> Capital Funds
<input type="checkbox"/> Donations
<input type="checkbox"/> Fundraising
<input type="checkbox"/> Friends of the Library
<input type="checkbox"/> Other: _____ |
|---|--|

List your specific Yearly Collection Funding Sources below and the amount of funding you receive

FUNDING SOURCES WORKSHEET

<i>ie. City of Fiction</i>	\$	<i>275 654.78</i>
1. _____	\$	_____.
2. _____	\$	_____.
3. _____	\$	_____.
4. _____	\$	_____.
5. _____	\$	_____.
6. _____	\$	_____.
7. _____	\$	_____.
8. _____	\$	_____.
9. _____	\$	_____.
10. _____	\$	_____.
Total Funding for YYYY	\$	_____.

COLLECTION FUNDS WORKSHEET

In Evergreen you can create funds at the system level or create a separate group of funds for each branch depending on how acquisitions is handled at your library.

1. List your Collection Funds at the organizational level.
2. Assign a percentage of your total funding to each fund. (Your percentages must add up to 100%)
3. List the Funding Source(s) for each fund.
4. Calculate the dollar amount to be allocated to each fund from the Funding Source(s).
5. If you plan create these funds in Evergreen assign a code to each fund.

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

BRANCH FUNDS WORKSHEET

1. Fill in the name of your collection at the top of the worksheet.
2. Fill in the total amount of funds for the collection.
3. List all the branches that will receive funds from the collection fund.
4. Give the each branch's fund a name and a unique fund code.
5. Assign a percentage of the Collection Fund to each branch (Your percentages must add up to 100%)
6. Calculate the dollar amount to be allocated to each fund from the funding source or from a system level fund.
7. Repeat for each collection for your library.

Name of Collection : _____

Total Funds: _____

Branch	Fund Code	Percentage	Dollar Amount
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
	Total	%	\$

Name of Collection : _____

Total Funds: _____

Branch	Fund Code	Percentage	Dollar Amount
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
	Total	%	\$

Name of Collection : _____

Total Funds: _____

Branch	Fund Code	Percentage	Dollar Amount
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
	Total	%	\$

Name of Collection : _____

Total Funds: _____

Branch	Fund Code	Percentage	Dollar Amount
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
	Total	%	\$

Name of Collection : _____

Total Funds: _____

Branch	Fund Code	Percentage	Dollar Amount
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
		%	\$
	Total	%	\$

CLAIM POLICIES

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: _____

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Period to wait until you make Claim: _____
Method of Contact: _____

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Method of Contact: _____

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Period to wait until you make Claim: _____
Method of Contact: _____

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

PROVIDERS (VENDORS) WORKSHEET

List all vendors you purchase collection materials from. Choose the Default Claiming Policy from the above list.

Provider (Vendor)

Name of Provider: _____

EDI Account (*circle*): yes/ no

Name of Contact:

SAN (Standard Address Number):

E-mail:

Holdings Tag:

Phone:

Currency:

Fax:

Ordering Discount:

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:

- All the time Quite often A few times a year Only special 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 [Sitka Evergreen Aquisitions Manual: Part III Administration](#)

Provider (Vendor)

Name of Provider: _____

EDI Account (*circle*): yes/ no

Name of Contact: _____

SAN (Standard Address Number): _____

E-mail: _____

Holdings Tag: _____

Phone: _____

Currency: _____

Fax: _____

Ordering Discount: _____

Types of Materials Ordered:

- | | | |
|------------------------------------|---|---------------------------------------|
| <input type="checkbox"/> books | <input type="checkbox"/> music CDs | <input type="checkbox"/> games |
| <input type="checkbox"/> magazines | <input type="checkbox"/> playaways | <input type="checkbox"/> story boxes |
| <input type="checkbox"/> DVDs | <input type="checkbox"/> audiobooks | <input type="checkbox"/> other: _____ |
| <input type="checkbox"/> VHS | <input type="checkbox"/> electronic books | |

Default # of Copies: _____

Default Claiming Policy: _____

Ordering Frequency:

- All the time Quite often A few times a year Only special orders Last time I ordered?

Provider (Vendor)

Name of Provider: _____

EDI Account (*circle*): yes/ no

Name of Contact: _____

SAN (Standard Address Number): _____

E-mail: _____

Holdings Tag: _____

Phone: _____

Currency: _____

Fax: _____

Ordering Discount: _____

Types of Materials Ordered:

- | | | |
|------------------------------------|---|---------------------------------------|
| <input type="checkbox"/> books | <input type="checkbox"/> music CDs | <input type="checkbox"/> games |
| <input type="checkbox"/> magazines | <input type="checkbox"/> playaways | <input type="checkbox"/> story boxes |
| <input type="checkbox"/> DVDs | <input type="checkbox"/> audiobooks | <input type="checkbox"/> other: _____ |
| <input type="checkbox"/> VHS | <input type="checkbox"/> electronic books | |

Default # of Copies: _____

Default Claiming Policy: _____

Ordering Frequency:

- All the time Quite often A few times a year Only special orders Last time I ordered?