



Bill Erickson



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# Acquisitions Roundup

- Selection
- Ordering
- Receiving & Claiming
- Cataloging
- Invoicing
- Administration
- What's Next



# Selection

- Selection Lists
- From Catalog Records
- From Z39.50
- Lineitem Searching
- Brief Records
- Patron Request and Notifications
- Lineitem Notes & Alerts
- Related Orders



# Selection Lists

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

Selection Lists

Go Back Reload Go Forward Debug Print Page Help

### My Selection Lists

New Selection List Clone Selected Merge Selected Delete Selected

<input checked="" type="checkbox"/>	Name	Owner	Creation Time	Edit Time	Org Unit	Entry Count
<input type="checkbox"/>	<a href="#">B and Taylor</a>	admin	2/18/10 1:48 PM	2/18/10 1:48 PM	BR1	11
<input type="checkbox"/>	<a href="#">B and Taylor 2</a>	admin	3/10/10 8:39 AM	3/10/10 8:39 AM	BR1	11
<input type="checkbox"/>	<a href="#">B and Taylor 3</a>	admin	3/10/10 9:47 AM	3/10/10 9:47 AM	BR1	11
<input type="checkbox"/>	<a href="#">Brodart</a>	admin	3/19/10 6:10 PM	3/19/10 6:10 PM	BR1	11
<input type="checkbox"/>	<a href="#">Brodart 4</a>	admin	4/9/10 3:34 PM	4/9/10 3:34 PM	BR1	0
<input type="checkbox"/>	<a href="#">Cats and Dogs</a>	admin	3/10/10 9:02 AM	4/4/10 11:52 AM	BR1	6
<input type="checkbox"/>	<a href="#">Cobol</a>	admin	3/19/10 5:49 PM	3/19/10 5:58 PM	BR1	2
<input type="checkbox"/>	<a href="#">Cobol II</a>	admin	3/31/10 3:57 PM	3/31/10 3:57 PM	BR1	1
<input type="checkbox"/>	<a href="#">Elephants</a>	admin	3/10/10 8:10 AM	3/10/10 8:10 AM	BR1	33
<input type="checkbox"/>	<a href="#">Java 2</a>	admin	2/15/10 10:45 PM	2/15/10 10:45 PM	CONS	1
<input type="checkbox"/>	<a href="#">Javascript</a>	admin	2/2/10 2:46 PM	4/15/10 12:22 PM	BR1	2
<input type="checkbox"/>	<a href="#">Music 1</a>	admin	3/24/10 11:11 AM	4/9/10 3:28 PM	BR1	8
<input type="checkbox"/>	<a href="#">Music and Trance</a>	admin	3/5/10 3:21 PM	3/5/10 3:21 PM	CONS	0
<input type="checkbox"/>	<a href="#">Perl</a>	admin	2/18/10 9:33 AM	2/18/10 9:33 AM	BR1	7
<input type="checkbox"/>	<a href="#">Python</a>	admin	2/18/10 1:25 PM	4/14/10 10:15 AM	BR1	8
<input type="checkbox"/>	<a href="#">Python 2</a>	admin	3/15/10 7:28 PM	3/15/10 7:28 PM	CONS	1
<input type="checkbox"/>	<a href="#">Upload 1</a>	admin	4/4/10 12:02 PM	4/4/10 12:02 PM	BR1	11
<input type="checkbox"/>	<a href="#">User Regs 1</a>	admin	3/25/10 1:25 PM	3/25/10 1:25 PM	CONS	1
<input type="checkbox"/>	<a href="#">World War II</a>	admin	3/9/10 5:24 PM	3/9/10 5:24 PM	BR1	0
<input type="checkbox"/>	<a href="#">XML</a>	admin	2/4/10 9:40 AM	2/16/10 2:31 PM	BR1	4
<input type="checkbox"/>	<a href="#">XSLT</a>	admin	2/8/10 10:12 PM	2/8/10 10:12 PM	CONS	1
<input type="checkbox"/>	<a href="#">xslt2</a>	admin	2/8/10 10:12 PM	2/8/10 10:12 PM	CONS	1

# From Catalog Records

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Item Status Patron Search Patron Registration

1 Bib Record: 30754 JavaScript Console

**Record Summary ( View MARC )**

Title: Python annotated archives Edition: Created By: admin Last Edited By: admin  
 Author: Brown, Martin C. Publication Date: c2000 TCN: 30754 Last Edited On: 2/18/10 1:58 PM

Record 3 of 4 Start Previous Next End

Go Back Reload Go Forward


Text Size: Regular / Large | Language: English (US)

keyword: python Go! Keyword All Formats Everywhere

**Example Branch 1**

Result 3 of 4 Start << >> End

Record Summary Place Hold More Actions...



Title	Python annotated archives
Author	Brown, Martin C.
ISBN	0072121041
Edition	
Publication Date	c2000
Publisher	Osborne/McGraw-Hill
Physical Description	print xxii, 722 p. : ill. ; 24 cm. + 1 computer optical laser disc (4 3/4 in.)
Format	text
Abstract	
Subjects	

More Actions...  
 Add to bookbag jazz  
 Create a new bookbag  
 Show / Create Orders

Add MFHD Record

Copy Summary Shelf Browser MARC Record

**View copy information for all libraries**

Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order	Reserves
<b>Example System 1</b>											
Example Branch 1	ACQ84	Display	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	0	0	0	0	0	0	1	0
<a href="#">print these details</a>											
	Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date				
	ACQ84 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-02-18	Yes					

Home  
 Advanced Search  
 My Account  
 You are logged in as **admin**  
 My Title Results  
 My Title Details  
 Relevant Subjects  
 Python (Computer program language)

Basic Catalog (HTML only) | Find a Library Near Me | Help | About PINES | GALILEO

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 Powered by EVERGREEN

# Related Orders

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (⌵)

Check Out Check In Item Status Patron Search Patron Registration

Acquisitions Search






Go Back Reload Go Forward Debug Print Page Help

### Related Lineitems

- Tickle toe / Lester Young ; arr. Rob McConnell
- Young, Lester "Prez",
- 1940

Create New Lineitem For This Record ▾

--Actions-- ▾

Line Items	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>  <a href="#">Python annotated archives /</a> (⚠) Brown, Martin C. 0072121041 c2000. Osborne/McGraw-Hill,	<a href="#">Copies(1)</a>	<a href="#">Notes(0)</a>	-- Actions -- ▾	new	33.33
<input type="checkbox"/>  <a href="#">Python annotated archives /</a> (⚠) Brown, Martin C. 0072121041 c2000. Osborne/McGraw-Hill,	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	-- Actions -- ▾	new	
<input type="checkbox"/>  <a href="#">Python annotated archives /</a> (⚠) Brown, Martin C. 0072121041 c2000. Osborne/McGraw-Hill,	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	-- Actions -- ▾	new	
<input type="checkbox"/>  <a href="#">Python annotated archives /</a> (⚠) Brown, Martin C. 0072121041 c2000. Osborne/McGraw-Hill, native-evergreen-catalog	<a href="#">Copies(1)</a>	<a href="#">Notes(1)</a>	-- Actions -- ▾	received	33.32
<input type="checkbox"/>  <a href="#">Python annotated archives /</a> (⚠) Brown, Martin C. 0072121041 c2000. Osborne/McGraw-Hill, biblios	<a href="#">Copies(1)</a>	<a href="#">Notes(1)</a>	-- Actions -- ▾	received	33.33

# Z39.50 / Federated Search

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

Title Search

Go Back Reload Go Forward Debug Print Page Help

### Search Sources

- Evergreen Catalog
- OCLC
- Library of Congress
- \$biblios.net

### Search Fields

Author

ISBN

ISSN

Item Type

LCCN

Publication Date

Publisher

Title

Title Control Number

Hits Per Source

Submit Clear Form

# Unified Searching

The screenshot shows a web browser window with the address bar displaying "1: admin@BR1-berick.dev198.esilibrary.com". The browser's menu bar includes "File", "Edit", "Search", "Circulation", "Cataloging", "Acquisitions", and "Booking". The main navigation area contains icons and labels for "Check Out", "Check In", "Item Status", "Patron Search", and "Patron Registration". A secondary navigation bar shows "Acquisitions Search" and "JavaScript Console".

The "Acquisitions Search" form is the central focus. It features a search scope dropdown set to "line items" and a matching criteria dropdown set to "all". Below this, there are four search criteria rows, each with a dropdown menu, a relationship dropdown, and a text input field:

- Row 1: "LIA - Title of work" dropdown, "contains" relationship, "architecture" text field.
- Row 2: "PO - Ordering Agency" dropdown, "is" relationship, "BR1" dropdown menu.
- Row 3: "PL - Owner" dropdown, "is" relationship, "admin" text field.
- Row 4: "I - Receive Date/Time" dropdown, "is on or AFTER" relationship, "3/10/2010" text field.

Each row has a red "X" button to its right. Below the search criteria is an "Add Search Term" button and a "Search" button. A calendar widget is displayed, showing the month of "March" for the year "2010". The calendar grid shows the following dates:

S	M	T	W	T	F	S
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

At the bottom of the calendar, the years "2009", "2010", and "2011" are visible, with "2010" selected. The interface also includes "Go Back", "Reload", and "Go Forward" buttons at the top left, and "Debug", "Print Page", and "Help" buttons at the top right. A "Hide Search Form" button is located on the right side of the search area.



# Brief Records

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

New Brief Record

Go Back Reload Go Forward Debug Print Page Help

## New Brief Record

Add To Selection List

Title of work

Author of work

Language of work

Pagination

ISSN

Price

Identifier

Publisher

Publication Date

Edition

UPC

ISBN

Save Record

# Patron Requests / Notifications

## Patron Requests

Context Org Unit BR1

[Back](#) [Next](#)

✓	Title	Author	ISxN	Article Title	Article Pages	Request Type	Volume	Publication Date	Publisher	Publication Location	Other Info	Mentioned In	Need Before Date/Time	Place Hold	Request Date/Time
<input type="checkbox"/>	<a href="#">Jo Jo Went to the market Again</a>	Martha Stewart	12332123			Books								True	3/10/10 5:21 PM
<input type="checkbox"/>	<a href="#">Jo Jo Went to the Movies</a>	Martha Stewart	12332124			Books								True	3/10/10 5:21 PM

# Patron Requests / Notifications

The screenshot shows a web browser window with the address bar displaying `1: admin@BR1-berick.dev198.esilibrary.com`. The browser's menu bar includes `File`, `Edit`, `Search`, `Circulation`, `Cataloging`, `Acquisitions`, and `Booking`. Below the menu bar is a navigation bar with icons and labels for `Check Out`, `Check In`, `Item Status`, `Patron Search`, and `Patron Registration`. The main content area is titled `1 User Requests` and contains a `Patron Request` form. The form has a header with `Go Back`, `Reload`, and `Go Forward` buttons, and a search bar on the right with `Debug` and `Print Page` options. The form fields are as follows:

Article Pages	
Article Title	
Author	Martha Stewart
Bib Record	
Cancel Reason	
Email Notify	True
Holdable Formats	
ID	2
ISxN	12332123
Max Acceptable Fee	
Mentioned In	
Need Before Date/Time	
Other Info	
PO Line Item	309
Phone Notify	
Pickup Library	BR1
Place Hold	True
Publication Date	
Publication Location	
Publisher	
Request Date/Time	3/10/10 5:21 PM
Request Type	Books
Title	Jo Jo Went to the market Again
User	36
Volume	

At the top right of the form area, there are four buttons: `Patron Requests`, `View Picklist`, `Set No Hold`, and `Cancel Request` (with a dropdown arrow).

# Lineitem Alerts / Note

1: admin@BR1-berick3.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

Selection Lists

Go Back Reload Go Forward  Debug Print Page

Selection list **Brodart**  
Create date: 3/19/10  
Last updated: 3/19/10  
Selector: admin  
Entry Count: 11

Return New Note ▾ New Alert ▾

1.	<b>Show Selector Before Receiving</b>	4/2/10 4:05 PM <a href="#">Delete</a>
2.	<b>VENDOR PUBLIC</b> Test Vendor Note	4/2/10 4:05 PM <a href="#">Delete</a>
3.	Test Note	4/2/10 4:04 PM <a href="#">Delete</a>

# Ordering

- Adding and Editing Copies, Funds, Prices, etc.
- Creating, Activating, Printing Purchase Orders
- Importing Vendor Order Records
- EDI
- Creating Real Copies from Order Copies





# Purchase Orders

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)








Check Out Check In Item Status Patron Search Patron Registration

Selection Lists

Go Back Reload Go Forward Debug Print Page Help

Selection list *Perl*  
 Create date: 2/18/10  
 Last updated: 2/18/10  
 Selector: admin  
 Entry Count: 7

--Actions--

Line Items	Items	Notes	Actions	Status	Estimated Price
<input checked="" type="checkbox"/>  <a href="#">Programming the Perl DBI /</a> (↵) Descartes, Alligator. 1565926994 2000. O'Reilly, biblios	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	- Actions -	new	
<input checked="" type="checkbox"/>  <a href="#">Why boys don't talk and why we care :</a> (↵) Shaffer, Susan Morris. 0967961106 c2000. Mid-Atlantic Equity Consortium, biblios	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	- Actions -	new	
<input type="checkbox"/>  <a href="#">Perl:</a> (↵) (P0: 11) Whitehead, Paul, 0764534785 2000. IDG, biblios	<a href="#">Copies(1)</a>	<a href="#">Notes(0)</a>	- Actions -	on-order	
<input type="checkbox"/>  <a href="#">Perl for dummies /</a> (↵) (P0: 9) Hoffman, Paul, 0764507761 3rd ed. c2001. IDG Books Worldwide, biblios	<a href="#">Copies(20)</a>	<a href="#">Notes(2)</a>	- Actions -	pending-order	
<input type="checkbox"/>  <a href="#">Writing Apache modules with Perl and C /</a> (↵) Stein, Lincoln D., 156592567X 1st ed. 1999. O'Reilly, biblios	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	- Actions -	new	
<input type="checkbox"/>  <a href="#">Perl! I didn't know you could do that... /</a> (↵) (P0: 10) Brown, Martin C. 0782128629 2001. Sybex, biblios	<a href="#">Copies(1)</a>	<a href="#">Notes(0)</a>	- Actions -	pending-order	
<input type="checkbox"/>  <a href="#">Programming Web graphics with PERL and GNU software /</a> (↵) Wallace, Shawn P. 1565924789 1999. O'Reilly, biblios	<a href="#">Copies(0)</a>	<a href="#">Notes(0)</a>	- Actions -	new	

Ordering Agency: BR1

Provider: BAB

Prepayment Required:

All Lineitems:

Selected Lineitems:

Import Bibs and Create Copies:

Submit

# Purchase Orders

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

Selection Lists

Go Back Reload Go Forward Debug Print Page Help

Purchase Order

ID 9

Name [9](#)

Provider [Books A Billion \(BAB\)](#)

Total Lineitems 1

Total Estimated \$442.40

Total Encumbered \$442.40

Total Spent \$0.00

Status pending

Prepayment Required? No

Cancel


Notes [0](#)

Activatable? Yes. [Activate Order](#)

Invoicing

--Actions--

**Line Items**

	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>	 <a href="#">Perl for dummies / (L)</a>	<a href="#">Copies(20)</a> <a href="#">Notes(2)</a>	<input type="button" value="- Actions -"/>	pending-order	22.12
	Hoffman, Paul, 0764507761 3rd ed. c2001. IDG Books Worldwide, biblios				



# Purchase Orders

## Purchase Order 26

date **20100404**

Vendor	Books A Billion	Ship to / Bill to	Example Branch 1 123 Main St. Anywhere GA US 30303
--------	-----------------	-------------------	---

Notes to the Vendor

- Rush Order

PO#	ISBN or Item #	Title	Quantity	Unit Price	Line Total	Notes
26	03-0009879	John Cage	5	3.33	16.65	• FOO 2
26	03-0011236	Nobody's blues but mine	1	2.22	2.22	
				Sub Total	18.87	

Total Line Item Count: 2

# Vendor File Upload

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

Load Order Record

Go Back Reload Go Forward Debug Print Page

## Upload

Create Purchase Order

Activate Purchase Order

Load Bibs and Items into the ILS

Provider BAB

Context Org Unit BR1

Add to Picklist Upload 1

Records File C:\Documents and Settings\berick\Desk Browse...

Upload

Lineitems Processed 10

Items Processed 0

Debits Encumbered 0

Bib Records Imported 0

Bib Records Indexed 0

Copies Created 0

Upload Complete!

[View Selection List](#)

# EDI: Vendors

- Testing/Communication Actively in Progress
  - Baker & Taylor
  - Ingram
  - Brodart
  - Midwest Tapes
  - Book House
  - EBSCO
- On Radar, But no Testing Yet...
  - Bound to Stay Bound, Gale Cengage, Cholastic/Grolier, Blackwell, Random House, Books, Coutts, Library Bound, S&D Books, Raincoast, BWI, Midwest Library Service



# Receiving & Claiming

- Full/Partial Receive
- Full/Partial Un-Receive
- Lineitem Worksheets
- Claim Policies
- Claiming



# Levels of Receiving

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

Selection Lists

Go Back Reload Go Forward Debug Print Page Help

Purchase Order

ID 9

Name [9](#)

Provider [Books A Billion \(BAB\)](#)

Total Lineitems 1

Total Estimated \$442.40

Total Encumbered \$442.40

Total Spent \$0.00

Status on-order

Prepayment Required? No


Cancel

Notes [0](#)

Invoicing

--Actions--

Line Items

	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>	 <a href="#">Perl for dummies / (A)</a>	<a href="#">Copies(20)</a> <a href="#">Notes(2)</a>	<input type="button" value="-- Actions --"/> <input type="button" value="-- Actions --"/> <input type="button" value="Mark Received"/> <input type="button" value="Un-Receive"/> <input type="button" value="Update Barcodes"/> <input type="button" value="Holdings Maint."/> <input type="button" value="New Invoice"/> <input type="button" value="Link to Invoice"/> <input type="button" value="View Invoice(s)"/> <input type="button" value="View Claim Policy"/>	on-order	22.12
	Hoffman, Paul, 0764507761 3rd ed. c2001. IDG Books Worldwide, biblios				

# Levels of Un-Receive

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

Selection Lists

Go Back Reload Go Forward Debug Print Page Help

Purchase Order

ID 9

Name [9](#)

Provider [Books A Billion \(BAB\)](#)

Total Lineitems 1

Total Estimated \$442.40

Total Encumbered \$442.40

Total Spent \$0.00

Status received



Prepayment Required? No

Notes [0](#)

Invoicing

--Actions--

Line Items

	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>	 <a href="#">Perl for dummies /</a> 	<a href="#">Copies(20)</a> <a href="#">Notes(2)</a>	<input type="button" value="-- Actions --"/> <input type="button" value="-- Actions --"/> <input type="button" value="Mark Received"/> <input type="button" value="Un-Receive"/> <input type="button" value="Update Barcodes"/> <input type="button" value="Holdings Maint"/> <input type="button" value="New Invoice"/> <input type="button" value="Link to Invoice"/> <input type="button" value="View Invoice(s)"/> <input type="button" value="View Claim Policy"/>	received	22.12

Hoffman, Paul, 0764507761 3rd ed. c2001. IDG Books Worldwide, bibliis

# Lineitem Worksheets

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

Selection Lists

Go Back Reload Go Forward Debug Print Page Help

## Lineitem Worksheet

**Title:** Perl for dummies /  
**Author:** Hoffman, Paul,  
**Item Count:** 20  
**Lineitem ID:** 116  
**Distribution Formulas:** Hi Volume Fiction,Continuing Education  
**Lineitem Notes:**

- test 123
- Needs MARC Record

Branch	Barcode	Call Number	Fund	Recd.	Notes
BR1	ACQ51	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ48	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	test 1
BR1	ACQ49	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	test 2
BR1	ACQ50	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ52	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ53	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ54	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ55	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ56	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ57	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ58	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ59	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ60	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ61	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ62	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR1	ACQ63	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ64	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ65	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ66	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	
BR2	ACQ67	ACQ48	F1 (2010)	2010-04-19T10:05:32-0400	

# Claim Policies

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

1 Server Settings

Go Back Reload Go Forward Debug Print Page Help

### Claim Policies

Show claim policies available to

[Back](#) [Next](#)

<input checked="" type="checkbox"/>	Claim Policy Name	Org Unit	Description
<input type="checkbox"/>	Print Materials	CONS	Print Materials

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

1 Server Settings

Go Back Reload Go Forward Debug Print Page Help

### Claim Policy Actions

[Back](#) [Next](#)

<input checked="" type="checkbox"/>	Action (Event Type)	Action Interval	Claim Policy ID
<input type="checkbox"/>	email	3 mons	Print Materials
<input type="checkbox"/>	email	5 mons	Print Materials
<input type="checkbox"/>	test	95 days	Print Materials



# Claim-Ready Items

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Item Status Patron Search Patron Registration

1 Claim-Eligible Items

Go Back Reload Go Forward Debug Print Page Help

## Items Eligible For Claiming

Show items ready to claim for: BR1

<input type="checkbox"/>	Items
<input type="checkbox"/>	<b>A guide to COBOL programming. WWEE!, by McCracken, Daniel D. 0</b> 10 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$34.40, Encumbered \$34.40, Paid \$0.00 <a href="#">PO: 25</a> <a href="#">SL: Cobol</a> [ <a href="#">Consider individual copies for claiming</a> ]
<input type="checkbox"/>	<b>Cobol II, by Jon Jones (12378902734)</b> 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled Estimated \$5.66, Encumbered \$5.66, Paid \$0.00 <a href="#">PO: 25</a> <a href="#">SL: Cobol</a> [ <a href="#">Consider individual copies for claiming</a> ]

Claim type:  Note:  Claim selected items

# Cataloging

- Lineitem / Bib Record Links
- Importing Bib Records from ACQ
- Auto-generated Barcodes & Callnumbers
- Batch Barcode Updating
- Holdings Maintenance
- MARC Import / Merge / Overlay & Connexion



# Import ACQ Records

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

1 Selection Lists

Go Back Reload Go Forward Debug Print Page Help

Purchase Order

ID 9

Name [9](#)

Provider [Books A Billion \(BAB\)](#)

Total Lineitems 1

Total Estimated \$442.40

Total Encumbered \$442.40

Total Spent \$0.00

Status pending

Prepayment Required? No

Cancel

Notes [0](#)

Activatable? Yes. [Activate Order](#)

Invoicing

--Actions--

- Actions--
- Save Items To Selection List
- Mark Ready for Selector
- Mark Ready for Order
- Delete Selected Items
- Add Brief Record
- Export Single Attribute List
- PO----
- Create Purchase Order
- Load Bibs and Items**
- Cancel Selected Lineitems
- Mark Purchase Order as Received
- Un-Receive Purchase Order
- Print Purchase Order

Items	Notes	Actions	Status	Estimated Price
<a href="#">Copies(20)</a>	<a href="#">Notes(2)</a>	<input type="button" value="- Actions -"/>	pending-order	22.12

61 3rd ed. c2001. IDG Books Worldwide, bibliis

# Auto-Generated Barcodes / CNs

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Item Status Patron Search Patron Registration

Acquisitions Search Bib Record: 1110147

**Record Summary ( View MARC )**

Title: A guide to COBOL programming. WWEE! Edition: Created By: admin Last Edited By: admin  
 Author: McCracken, Daniel D. Publication Date: [c1963] TCN: 1110147 Last Edited On: 4/19/10 10:36 AM

Record 1 of 1 Start Previous Next End

Go Back Reload Go Forward

My Account  
 You are logged in as **admin**

My Title Results  
**My Title Details**

Relevant Subjects  
 COBOL (Computer program language)

Author: McCracken, Daniel D.  
 ISBN:  
 Edition:  
 Publication Date: [c1963]  
 Publisher: Wiley  
 Physical Description: print 182 p. illus. 28 cm.  
 Format: text  
 Abstract:  
 Subjects: COBOL (Computer program language)

Add MFHD Record

Copy Summary Shelf Browser MARC Record

**View copy information for all libraries**

Library	Callnumber	Copy Location	Actions	Available	Checked out	In process	In transit	Reshelving	On holds shelf	On order	Reserves
<b>Example System 1</b>											
Example Branch 1	ACQ271	Display	<a href="#">Copy Details</a> <a href="#">Browse Call Numbers</a> <a href="#">Place Hold</a>	0	0	0	0	0	0	9	0

print these details

Barcode	Status	Location	Age Hold Protection	Create Date	Holdable	Due Date
ACQ271 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ272 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ273 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ274 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ275 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ276 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ277 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ278 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	
ACQ280 <a href="#">place hold</a>	On order	Display	- Disabled -	2010-04-19	Yes	

# Batch Barcode Editing

**Volume and Copy Editor**

**Record Summary ( [View MARC](#) )**

Title:  Edition:  Created By:  Last Edited By:   
Author:  Publication Date:  TCN:  Last Edited On:

**Volume and Copy Creator**

Auto-Generate Barcodes?  Check Barcodes?  Print Labels?

Library	# of volumes	Call Numbers	# of Copies	
BR1	<input type="text" value="1"/>	<input type="text" value="ACQ271"/>	<input type="text" value="9"/>	<input type="text" value="ACQ271"/>
				<input type="text" value="ACQ272"/>
				<input type="text" value="ACQ273"/>
				<input type="text" value="ACQ274"/>
				<input type="text" value="ACQ275"/>
				<input type="text" value="ACQ276"/>
				<input type="text" value="ACQ277"/>
				<input type="text" value="ACQ278"/>
				<input type="text" value="ACQ280"/>
BR2	<input type="text" value="1"/>	<input type="text" value="ACQ271"/>	<input type="text" value="1"/>	<input type="text" value="ACQ279"/>

# Holdings Maintenance

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

1 Acquisitions Search 2 Bib Record: 1110147

Go Back Reload Go Forward Debug Print Page Help

Purchase Order

ID 25

Name [25](#)

Provider [Books A Billion \(BAB\)](#)

Total Lineitems 2

Total Estimated \$40.06

Total Encumbered \$40.06

Total Spent \$0.00

Status received

Prepayment Required? No

Notes [1](#)

Invoicing

--Actions--

Line Items	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/> <a href="#">A guide to COBOL programming. WWEE!</a> (⚡) McCracken, Daniel D. [c1963] Wiley biblios	<a href="#">Copies(10)</a>	<a href="#">Notes(3)</a>	- Actions - - Actions - Mark Received Un-Receive Update Barcodes <b>Holdings Maint.</b> New Invoice Link to Invoice View Invoice(s) View Claim Policy	received	3.44
<input type="checkbox"/> <a href="#">Cobol II</a> (⚡) Jon Jones 12378902734	<a href="#">Copies(1)</a>	<a href="#">Notes(0)</a>		received	5.66

# MARC Import/Merge/Overlay

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Item Status Patron Search Patron Registration

1 Server Settings 2 Patron Search 3 Patron Search 4 Patron: Smith, Anna Margie

Go Back Reload Go Forward Debug Print Page

Export Records Import Records Inspect Queue Edit Attributes Edit Merge / Overlay Profiles

### Overlay / Merge Profiles

Context Org Unit BR1

[Back](#) [Next](#)

<input checked="" type="checkbox"/>	Name	Owner	Preserve Specification	Replace Specification	Add Specification	Remove Specification
<input type="checkbox"/>	Merge: Add Subjects	CONS		000	600,650	
<input type="checkbox"/>	Merge: Replace Subjects	CONS		600,650		
<input type="checkbox"/>	Overlay: Drop Holdings	CONS				841,842,843,844,845,850,852
<input type="checkbox"/>	Overlay: Keep Subjects	CONS	600,650			

New Merge Profile Delete Selected

# MARC Import/Merge/Overlay

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

1 Server Settings 2 Patron Search 3 Patron Search 4 Patron: Smith, Anna Margie

Go Back Reload Go Forward Debug Print Page

Export Records **Import Records** Inspect Queue Edit Attributes Edit Merge / Overlay Profiles

## Evergreen MARC File Upload

Record Type: Bibliographic Records

Create a New Upload Queue:  or Add to an Existing Queue:

Auto-Import Non-Colliding Records:

Auto Merge/Overlay Exact Matches:

Auto Merge/Overlay When Exactly 1 Match is Found:

Merge/Overlay Profile:

- Overlay: Keep Subjects
- Merge: Replace Subjects
- Overlay: Drop Holdings
- Merge: Add Subjects

Import Attached Holdings:

Holdings Import Profile:

Select a Record Source: oclc

File to Upload:  Browse...

Upload



# Connexion Integration

- Using Cataloging Import/Merge profiles
- Support for embedded action codes
  - 905t = merge profile
  - 905a = add specification, etc.
  - 905 \$a 650abc,655d, 660



# Invoicing

- Creating & Linking
- Local charge types and fees
- Prorating
- Closing & Re-opening
- In Progress: Printing Vouchers



# Invoice Creating / Linking

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

Acquisitions Search Acquisitions Search

Go Back Reload Go Forward Debug Print Page Help

Purchase Order

ID 3

Name [JS PO](#)

Provider [Books A Billion \(BAB\)](#)

Total Lineitems 1

Total Estimated \$0.00

Total Encumbered \$33.00

Total Spent \$0.00

Status pending

Prepayment Required? No

Cancel

Notes [0](#)

Activatable? Yes. [Activate Order](#)

Invoicing


--Actions--

**Choose invoice**

Provider

Invoice #

Line Items

	Items	Notes	Actions	Status	Estimated Price
<input type="checkbox"/>	 <a href="#">JavaScript application cookbook /</a>	<a href="#">Copies(10)</a> <a href="#">Notes(2)</a>	<input type="button" value="-- Actions --"/>	pending-order	<input type="text"/>
	Bradenbaugh, Jerry. 1565925777 1st ed. 1999. O'Reilly, biblios				

# Invoice: Editing, Charges, Prorating

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

Acquisitions Search Bib Record: 1110147

Go Back Reload Go Forward Debug Print Page Help

### Invoice

Vendor Invoice ID: 780987 Receive Date/Time: 3/20/2010

Receive Method: Paper Invoice Type:

Provider: BAB Shipper: BAB

Note: test note Payment Auth:

Payment Method: Receiver: BR1

### Bibliographic Items

Title Details	# Invoiced	# Received	Billed	Paid	Detach
<b>Why elephants have big ears :, by Lavers, Chris. (0575067225)</b> 1 Ordered, 1 Received, 1 Invoiced, 0 Claimed, 0 Cancelled Estimated \$3.45, Encumbered \$0.00, Paid \$3.01 <a href="#">PO: 79879asdfjlk</a> <a href="#">SL: Elephants</a>	1	1	3.01	3.01	<a href="#">Detach</a>
<b>Elephants :, by Saller, Martin, (3829017529)</b> 3 Ordered, 3 Received, 3 Invoiced, 0 Claimed, 0 Cancelled Estimated \$13.68, Encumbered \$0.00, Paid \$13.00 <a href="#">PO: 79879asdfjlk</a> <a href="#">SL: Elephants</a>	3	3	13.00	13.00	<a href="#">Detach</a>

### Taxes, Fees, Misc.

Charge Type	Title/Description	Author	Fund	Billed	Paid	Delete
Tax			F1 (2010)	8.12	8.12	<a href="#">Delete</a>
Tax			F3 (2010)	1.88	1.88	<a href="#">Delete</a>
Processing Fee			F16 (2010)	3.44	3.44	<a href="#">Delete</a>

[Add Charge...](#)

	Total	Total	Balance
<input type="button" value="Save"/> <input type="button" value="Save &amp; Prorate"/> <input type="button" value="Save &amp; Close"/>	29.45	29.45	0.00

# Invoices: Closing & Re-Opening

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin

Check Out Check In Item Status Patron Search Patron Registration

Acquisitions Search Bib Record: 1110147

Go Back Reload Go Forward Debug Print Page Help

### Invoice

Vendor Invoice ID [780987](#) Receive Date/Time [3/20/10 11:53 PM](#)

Receive Method [Paper](#) Invoice Type

Provider [BAB](#) Shipper [BAB](#)

Note [test note](#) Payment Auth

Payment Method Receiver [BR1](#)

### Bibliographic Items

Title Details	# Invoiced	# Received	Billed	Paid
<b>Why elephants have big ears :, by Lavers, Chris. (0575067225)</b> 1 Ordered, 1 Received, 1 Invoiced, 0 Claimed, 0 Cancelled Estimated \$3.45, Encumbered \$0.00, Paid \$3.01 <a href="#">PO: 79879asdfjlk</a> <a href="#">SL: Elephants</a>	1	1	3.01	3.01
<b>Elephants :, by Saller, Martin. (3829017529)</b> 3 Ordered, 3 Received, 3 Invoiced, 0 Claimed, 0 Cancelled Estimated \$13.68, Encumbered \$0.00, Paid \$13.00 <a href="#">PO: 79879asdfjlk</a> <a href="#">SL: Elephants</a>	3	3	13.00	13.00

### Taxes, Fees, Misc.

Charge Type	Title/Description	Author	Fund	Billed	Paid
Tax			F1	8.12	8.12
Tax			F3	1.88	1.88
Processing Fee			F16	3.44	3.44

	Total	Total	Balance
<input type="button" value="Reopen Invoice"/>	<input type="text" value="29.45"/>	<input type="text" value="29.45"/>	<input type="text" value="0.00"/>

# Administration

- Funds, Tags & Fiscal Rollover
- Providers/Vendors
- Distribution Formulas
- Lineitem Alerts
- Cancellation Reasons
- Editing Templates (PO, worksheets, Notices,...)



# Funds

Context Org Unit BR1 Year 2010 Refresh

Back Next

✓	Name	Code	Year	Org Unit	Currency Type	combined_balance	Active	Balance Stop Percent	Balance Warning Percent	Propagate	Rollover
<input type="checkbox"/>	<a href="#">Fund 1</a>	F1	2010	BR1	US Dollars	10589.91	True	-10	5	True	True
<input type="checkbox"/>	<a href="#">Fund 10</a>	F10	2010	BR1	US Dollars	225.00	True		50	True	True
<input type="checkbox"/>	<a href="#">Fund 11</a>	F11	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 12</a>	F12	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 13</a>	F13	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 14</a>	F14	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 15</a>	F15	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 16</a>	F16	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 17</a>	F17	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 18</a>	F18	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 2</a>	F2	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 3</a>	F3	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 4</a>	F4	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 5</a>	F5	2010	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 6</a>	F6	2010	BR1	US Dollars	0	True			True	True

# Fund Editing

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

1 Funds

Go Back Reload Go Forward Debug Print Page

Funds

New Fund Delete Selected Fund Propagation & Rollover

Context Org Unit BR1 Year 2010 Refresh

Back Next

✓	Name	Code	Year	Org Unit	Currency Type	combined_balance	Active	Balance Stop Percent	Balance Warning Percent	Propagate	Rollover
<input type="checkbox"/>	<a href="#">Fund 1</a>	F1	2010	BR1	US Dollars	10589.91	True	-10	5	True	True
<input type="checkbox"/>	<a href="#">Fund 10</a>	F10	2010	BR1	US Dollars	225.00	True		50	True	True
<input type="checkbox"/>	<a href="#">Fund 11</a>	F11	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 12</a>	F12	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 13</a>	F13	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 14</a>	F14	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 15</a>	F15	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 16</a>	F16	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 17</a>	F17	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 18</a>	F18	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 2</a>	F2	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 3</a>	F3	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 4</a>	F4	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 5</a>	F5	2010	BR1	US Dollars		True			True	True
<input type="checkbox"/>	<a href="#">Fund 6</a>	F6	2010	BR1	US Dollars		True			True	True

Fund ID: 317

Name: Fund 11

Code: F11

Year: 2010

Org Unit: BR1

Currency Type: US Dollars

Active:

Balance Stop Percent:

Balance Warning Percent:

Propagate:

Rollover:

Cancel Save



# Fiscal Rollover

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Item Status Patron Search Patron Registration

1 Funds

Go Back Reload Go Forward

Context Org Unit BR1 Year 2010 Refresh

New Fund Delete Selected Fund Propagation & Rollover

Back Next

✓	Name	Code	Year	Org Unit	Currency Type	combined_balance	Active	Balance Percent
<input type="checkbox"/>	<a href="#">Fund 1</a>	F1	2010	BR1	US Dollars	10589.91	True	-10
<input type="checkbox"/>	<a href="#">Fund 10</a>	F10	2010	BR1	US Dollars	225.00	True	
<input type="checkbox"/>	<a href="#">Fund 11</a>	F11	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 12</a>	F12	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 13</a>	F13	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 14</a>	F14	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 15</a>	F15	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 16</a>	F16	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 17</a>	F17	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 18</a>	F18	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 2</a>	F2	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 3</a>	F3	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 4</a>	F4	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 5</a>	F5	2010	BR1	US Dollars	0	True	
<input type="checkbox"/>	<a href="#">Fund 6</a>	F6	2010	BR1	US Dollars	0	True	

Propagation creates new funds for the subsequent fiscal year based on the funds for the selected fiscal year. Only funds with the propagate setting enabled will be affected. No money or encumbrances are altered during this process.

Perform Fiscal Year Close-out Operation:

The year end close out operation moves encumbrances from the selected fiscal year to the analogous funds in the subsequent fiscal year and it deactivates funds for the selected fiscal year. Additionally, for all funds that have the "Roller" setting enabled, this process will move all unspent money to the analogous fund in the subsequent fiscal year.

Context Org Unit: BR1

Include Funds for Descendant Org Units:

Dry Run:

When Dry Run is selected, the system will generate a summary of the changes that would occur during the selected operation(s). No data will be changed.

# Fiscal Rollover Review

Funds

Funds New Fund Delete Selected Fund Propagation & Rollover

Context Org Unit BR1 Year 2010 Refresh

Fund Propagation & Rollover Summary for Fiscal Year 2011

- These changes have **not** been committed yet.
- **18** funds propagated for fiscal year 2011 for the selected locations
- **\$0** unspent money rolled over to fiscal year 2011 for the selected locations

[Back](#) [Next](#)

✓	Name	Code	Year	Org Unit	Currency Type	combined_balance	Active	Balance Stop Percent	Balance Warning Percent	Propagate	Rollover
<input type="checkbox"/>	<a href="#">Fund 1</a>	F1	2011	BR1	US Dollars	0	True	-10	5	True	True
<input type="checkbox"/>	<a href="#">Fund 10</a>	F10	2011	BR1	US Dollars	0	True		50	True	True
<input type="checkbox"/>	<a href="#">Fund 11</a>	F11	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 12</a>	F12	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 13</a>	F13	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 14</a>	F14	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 15</a>	F15	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 16</a>	F16	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 17</a>	F17	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 18</a>	F18	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 2</a>	F2	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 3</a>	F3	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 4</a>	F4	2011	BR1	US Dollars	0	True			True	True
<input type="checkbox"/>	<a href="#">Fund 5</a>	F5	2011	BR1	US Dollars	0	True			True	True

# Vendors: Import Attributes

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

1 Providers

Go Back Reload Go Forward Debug Print Page Help

Active  Code BAB

Currency US Dollars Default Claim Policy

EDI Default Email

Fax Phone Holdings Tag

Owner BR1 Phone

Prepayment Required  Provider ID 1

Provider Name Books A Billion SAN

URL

Cancel Save

Provider Address Provider Contact **Attribute Definitions** Holding Subfield Invoices

**Attribute Definitions** New Attribute Definition Delete Selected

✓	Provider	Code	Description	Is Identifier?	Remove	tag	subfield	XPath
<input type="checkbox"/>	BAB	item_ident	Item Identification Number	True		910	a	//*[tag="910"]/*[code="a"]

# Vendors: Import Attributes

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking

Check Out Check In Item Status Patron Search Patron Registration

Providers

Go Back Reload Go Forward Debug Print Page Help

Active  Code BAB

Currency US Dollars Default Claim Policy

EDI Default Email

Fax Phone Holdings Tag

Owner BR1 Phone

Prepayment Required  Provider ID 1

Provider Name Books A Billion SAN

URL

Cancel Save

Provider Address Provider Contact Attribute Definitions Holding Subfield Invoices

### Holding Subfield

New Holding Subfield Delete Selected

✓	Provider	Name	Subfield
<input type="checkbox"/>	BAB	collection_coc	c
<input type="checkbox"/>	BAB	fund	f
<input type="checkbox"/>	BAB	owning_lib	a
<input type="checkbox"/>	BAB	price	p
<input type="checkbox"/>	BAB	quantity	b

# Formulas, Alerts, Cancel Reasons

Go Back Reload Go Forward

### Hi Volume Fiction

✓	Owning Library	Location	Item Count	Position	
<input type="checkbox"/>	BR1	Stacks	5	1	
<input type="checkbox"/>	BR1	Display	2	2	
<input type="checkbox"/>	BR2	Stacks	4	3	
<input type="checkbox"/>	BR2		2	4	

Go Back Reload Go Forward

### Line Item Alert Text

Context Org Unit

✓	Code	Description	Owning Library	
<input type="checkbox"/>	Needs MARC Record	This item needs a better MARC record	CONS	
<input type="checkbox"/>	Show Selector Before Receiving	Show this item to the selector before receiving	CONS	

Go Back Reload Go Forward  Debug Print Pa

### PO / Item / Request Cancellation Reasons

New Cancel Reason Delete Selected

Context Org Unit

[Back](#) [Next](#)

✓	Using Library	Label	Description
<input type="checkbox"/>	CONS	Invalid ISBN	ISBN is unrecognizable
<input type="checkbox"/>	CONS	Postpone	Title has been postponed
<input type="checkbox"/>	CONS	Out of Print	Item is no longer in print
<input type="checkbox"/>	CONS	Long Wait	Item has a long wait

# Templates

1: admin@BR1-berick.dev198.esilibrary.com

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-)

Check Out Check In Item Status Patron Search Patron Registration

2 Server Settings

Go Back Reload Go Forward Debug Print Page Help

Event Definitions Hooks Reactors Validators

Trigger Event Definitions

Success Cleanup

New Clone Selected Delete Selected

```
[%- USE date -%]
[%- SET li = target; -%]
<div class="wrapper">
  <div class="summary" style='font-size:110%; font-weight:bold;'>

    <div>Title: [% helpers.get_li_attr("title", "", li.attributes)
  %]</div>
  <div>Author: [% helpers.get_li_attr("author", "",
li.attributes) %]</div>
  <div class="count">Item Count: [% li.lineitem_details.size
  %]</div>
  <div class="lineid">Lineitem ID: [% li.id
  %]</div>

  [% IF li.distribution_formulas.size > 0 %]
  [% SET forms = [] %]
  [% FOREACH form IN li.distribution_formulas;
forms.push(form.formula.name); END %]
  <div>Distribution Formulas: [% forms.join(',')
  %]</div>
  [% END
  %]

  [% IF li.lineitem.notes.size > 0 %]
  Lineitem Notes:
  <ul>
    [%- FOR note IN li.lineitem.notes -%]
    <li>
      [% IF note.alert_text %]
      [% note.alert_text.code -%]
      [% IF note.value -%]
      : [% note.value %]
    r% END %]
  %]
  %]
```

Template

# What's Next

- In Progress
  - Testing, Review, Interface Efficiency, More Testing
  - Non-bib encumbrances
  - More EDI...
  - Saved Searches
  - Standing Orders
  - More MARC Import enhancements
- Enhanced Vendor Connectivity





Bill Erickson



Questions?

Slides Available at [evergreen-ils.org](http://evergreen-ils.org)

<http://evergreen-ils.org/dokuwiki/doku.php?id=advocacy:presentations>





