# **New Library Setup Initial Interview:**

# Current setup

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| **What is your current workflow?** | |
| What does each of your staff do? Split responsibilities for AUP? | Pearl makes sure invoices are paid, makes sure things are rec’d and loaded. Checks behind catalogers to make sure things received. Walter maybe help with selection once on PINES (he’s a cataloger). |
| Centralized/decentralized selection | Centralized selection (just JL) |
| Cataloging/processing with any vendor vs. done in-house | Processing done by BT. Just signed contract with MWT to get processing done with them. But other than that in house. Cataloging in house. |
| How are funds/money divided? | Funds by collection. |
| Are items delivered to HQS or to branches?  Do you have SANs (if using EDI?) | Everything delivered to HQs. |
| Are all your funding sources on July-June FY? | One grant for World Book encyclopedias. (Find out how to do year end for a Jan-Dec year end fund.) |
| What kind of funding sources do you have? State/local/donations (purchases)? |  |
| How many vendors do you currently use? | Baker, MWT, Amazon, Scholastic, Reference Point Press. |
| Who’s your primary vendor? | Baker |
| How frequently do you order? | All do orders by second week of month, so roughly monthly |
| Do subscriptions/databases/electronic resources come out of collection dev budget? | Magazines (in Sirsi), JL wants to test serials module. Databases also JL manages. |
| Is everything done with a PO? | Yes |

# Make cart on vendor

Use grids but only do fund info because own\_lib is Bull st until it’s received and cataloged, and then it changes to Float until it settles somewhere and then Own\_lib changes to where the item settles.

Download file from the vendor

Pull into Sirsi

Received, someone unpacks it. Packing slip and invoice come in same box. Attach packing slip and invoice and send upstairs to bookkeeper.

Use PO # to indicate to bookkeeper the vendor and collection and bookkeeper uses that to decide which G/L fund to code it to.