

Chapter 8

Acquisitions

The Koha Acquisitions module provides a way for the library to record orders placed with vendors and manage purchase budgets.

- *Get there:* More > Acquisitions

8.1 Setup

Before using the Acquisitions Module you will want to make sure that you have completed all of the set up.

First, set your [Acquisitions System Preferences](#) and [Acquisitions Administration](#) to match your library's workflow.

On the main acquisitions page you will see your library's funds listed.

All available funds for Nicole's Library branch

Fund	Owner	Branch	Amount	Ordered	Spent	Avail
FIC	Nicole Engard	Nicole's Library	5,000.00	1,317.81	394.43	3,287.76
NFIC		Nicole's Library	2,500.00	26.00	187.95	2,286.05
Total			7,500.00	1,343.81	582.38	5,573.81

Show all : ☐

TIP



If the total line is confusing for the funds you have set up you can hide it by adding

```
#funds_total {display:none;}
```

to the [IntranetUserCSS](#) preference.

To see all active funds you can click the checkbox next to 'Show all' below the funds table.

To see a history of all orders in a fund you can click on the linked amount and it will run a search for you.

Fund: FIC**Ordered**

Title	Order	Vendor	Itemtype	Left on Order	Estimated cost per unit	Date Ordered	Subtotal
Korean-English Dictionary	6	1	CDBK	1	10.00	04/28/2011	10.00
The lost gate :	18	3	BK	1	24.99	11/09/2011	24.99
To have and to kill /	19	3	BK	1	24.99	11/09/2011	24.99
Love letters :	21	3	BK	1	25.99	11/09/2011	25.99
Mr. Monk on the road :	22	3	BK	1	22.95	11/09/2011	22.95

Learn more in the [Budget/Fund Tracking](#) section of this manual.

8.2 Vendors

Before any orders can be places you must first enter at least one vendor.

8.2.1 Add a Vendor

To add a vendor click the 'New Vendor' button on the Acquisitions page

The screenshot shows the 'Acquisitions' page. At the top, there is a button labeled 'New vendor'. Below it, the 'Manage orders' section is visible, containing a 'Vendor:' label, a text input field, and a 'Search' button.

The vendor add form is broken into three pieces

- The first section is for basic information about the Vendor

The screenshot shows the 'Company details' form section. It includes the following fields: 'Name *' (required), 'Postal address', 'Physical address', 'Phone', 'Fax', 'Website', and 'Account number'.

- Of these fields, only the Vendor name is required, the rest of the information should be added to help with generating claim letters and invoices

- The second section is for information regarding your contact at the Vendor's office

Contact details

Contact name

Position

Phone

Alternative phone

Fax

Email

Notes

- None of these fields are required, they should only be entered if you want to keep track of your contact's information within Koha
- The final section is for billing information

Ordering information

Vendor is: Active ☒ Inactive ☐

List prices are

Invoice prices are

Tax Number Registered: Yes ☐ No ☒

List prices: Include tax ☐ Don't include tax ☒

Invoice prices: Include tax ☐ Don't include tax ☒

Discount %

Tax rate % (leave blank for default tax of 0.0%)

Delivery time days

Notes

- To be able to order from a vendor you must make them 'Active'
- For List Prices and Invoice Prices choose the currency
 - * Currencies are assigned in the **Currencies & Exchange Rates** admin area
- If your library is charged tax mark your Tax Number as registered
- Note if you list prices and/or invoice prices include tax
- If the vendor offers a consistent blank discount, enter that in the 'Discount' field
 - * You can enter item specific discounts when placing an order
- Enter your tax rate if your library is charged taxes on orders
- If you know about how long it usually takes orders to arrive from this vendor you can enter a delivery time. This will allow Koha to estimate when orders will arrive at your library on the late orders report.
- Notes are for internal use

8.2.2 View/Edit a Vendor

To view a vendor's information page you must search for the vendor from the Acquisitions home page. Your search can be for any part of the Vendor's name:

+ New vendor

You searched on vendor a, 3 results found

Choose a vendor in the list to jump directly to the right place. Amazon

Amazon New basket Receive shipment

Basket (#)	Item count	Biblio count	Items expected	Created by	Date	
PO373728 (#3)	1	1	0	Nicole Engard	10/14/2012	closed on 10/14/2012 View
PO37772929 (#2)	2	2	1	Nicole Engard	10/13/2012	closed on 10/13/2012 View
PO77662 (#4)	1	1	0	Nicole Engard	10/25/2012	View

Baker & Taylor New basket Receive shipment

No pending baskets

Information Today Inc. New basket Receive shipment

No pending baskets

From the results, click on the name of the vendor you want to view or edit

[Home](#) > [Acquisitions](#) > [Baker & Taylor](#)

[Baskets](#)
[Basket groups](#)
[Contracts](#)
[Invoices](#)
[Uncertain prices](#)

+ New
✎ Edit vendor
✕ Delete vendor

Baker & Taylor

Vendor details

Company name: Baker & Taylor
 Postal address: 2550 W Tyvola Rd Charlotte, NC 28217
 Physical address:
 Phone: (704) 998-3100
 Fax:
 Website: <http://www.btol.com/>
 Account number: 123456

Ordering information

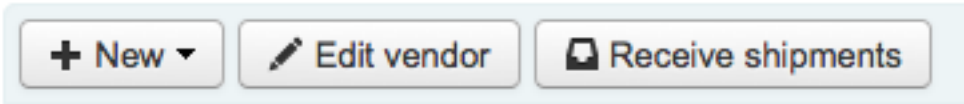
Vendor is: Active
List prices are: USD
Invoice prices are: USD
Discount: 0.0 %
Tax rate: 0.0 %
Delivery time: 5 days

Contact details

Contact name: John Smith
 Position: Sales
 Phone: (704) 998-3100
 Alternative phone:
 Fax:
 Email: sales@bt.com

To make changes to the vendor, simply click the 'Edit vendor' button.

If the vendor has no baskets attached to it then a 'Delete vendor' button will also be visible and the vendor can be deleted. Otherwise you will see a 'Receive shipment' button.



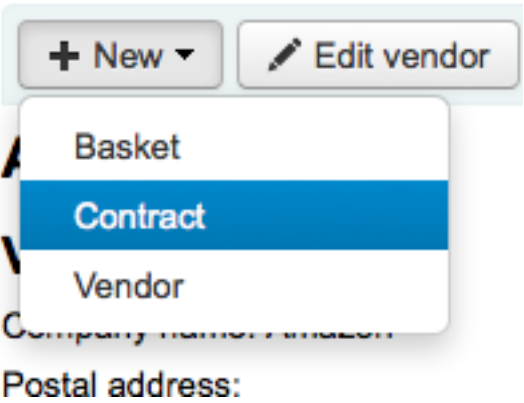
Amazon

8.2.3 Vendor Contracts

You can define contracts (with a start and end date) and attach them to a vendor. This is used so that at the end of the year you can see how much you spent on a specific contract with a vendor. In some places, contracts are set up with a minimum and maximum yearly amount.

8.2.3.1 Add a Contract

At the top of a Vendor Information Page, you will see a 'New Contract' button.



The contract form will ask for some very basic information about the contract

New contract for Amazon

Name *

Description

Start date *

(MM/DD/YYYY)

End date *

(MM/DD/YYYY)

Save

Cancel

IMPORTANT

You cannot enter a contract retrospectively. The end date must not be before today's date.

Once the contract is saved it will appear below the vendor information.

+ New ▾

Edit vendor

Receive shipments

Amazon

Vendor details

Company name: Amazon

Postal address:

Physical address:

Phone:

Fax:

Website: <http://amazon.com>

Account number: AMZ123432

Contact details

Contact name:

Position:

Phone:

Alternative phone:

Fax:

Ordering information

Vendor is: Active

List prices are: USD

Invoice prices are: USD

Discount: 0.0 %

Tax rate: 0.0 %

Contract(s)

Name ▲	Description ◆	Start date ◆	End date ◆		
Fiction 2013		01/01/2013	12/31/2013	Edit	Delete

It will also be an option when creating a basket

Add a basket to Amazon

Basket name PO3388282

Billing place: Nicole's Library

Delivery place: Nicole's Library

Vendor Amazon

Internal note

Vendor note

Contract Fiction 2013

Save Cancel

8.3 Managing Suggestions

Depending on your settings in the **suggestion** system preference, patrons may be able to make purchase suggestions via the OPAC. When a suggestion is waiting for library review, it will appear on the Acquisitions home page under the vendor search.

Pending suggestions

6 suggestions waiting. [Manage suggestions.](#)

It will also appear on the main staff dashboard under the module labels:

Suggestions pending approval: **6**
 Comments pending approval: **1**
 Tags pending approval: **3**

Clicking 'Manage suggestions' will take you to the suggestion management tool. If there are no pending suggestions you can access the suggestion management tool by clicking the 'Manage suggestions' link on the menu on the left of the Acquisitions page.

Suggestions management

Accepted (1) Pending (4) Checked (2) Ordered (1) Rejected (1)

Check all | Uncheck all

	Suggestion	Suggested by /on	Managed by /on	Library	Budget	Status
<input type="checkbox"/>	The Reader's digest. [edit] ; Published by The Reader's Digest Association]	Engard, Nicole	Engard, Nicole			Accepted (Bestseller)

Mark selected as: -- Choose a status -- with this reason: -- Choose a reason -- OR: Delete selected ☐

Submit

Your suggestions will be sorted into several tabs: Accepted, Pending, Checked, Ordered and/or Rejected. Each accepted or rejected suggestion will show the name of the librarian who managed the suggestion and the reason they gave for accepting or rejecting it (found under 'Status').

An 'Accepted' suggestion is one that you have marked as 'Accepted' using the form below the suggestions. A 'Pending' suggestion is one that is awaiting action from the library. A 'Checked' suggestion is one that has been marked as 'Checked' using the form before the suggestions. An 'Ordered' suggestion is one that has been ordered using the 'From a purchase suggestion' link in your basket. A 'Rejected' suggestion is one that you have marked at 'Rejected' using the form below the list of suggestions.

For libraries with lots of suggestions, there are filters on the left hand side of the Manage Suggestions page to assist in limiting the number of titles displayed on the screen.

Organize by:

Status

Filter by: [clear]

Bibliographic information

Suggestion information

Acquisition information

Clicking on the blue headings will expand the filtering options and clicking '[clear]' will clear all filters and show all suggestions.

TIP

The suggestions page will automatically be limited to suggestions for your library. To see information for all (or any other) libraries click on the 'Acquisition information' filter and change the library.



Organize by:

Status ▾ Go

Filter by: [\[clear\]](#)

Bibliographic information

Suggestion information

Acquisition information
Book fund:
Any ▾
For:
Any ▾
Any
Centerville
Fairfield
Fairview
Franklin
Goleta Public Library
Liberty
Midway
Nicole's Library
Pleasant Valley
Riverside
Springfield
Troy
Union

When reviewing 'Pending' suggestions you can choose to check the box next to the item(s) you want to approve/reject and then choose the status and reason for your selection. You can also choose to completely delete the suggestion by checking the 'Delete selected' box.

Suggestions management

Accepted (1)
Pending (4)
Checked (2)
Ordered (1)
Rejected (1)

Check all | Uncheck all

	Suggestion	Suggested by /on	Managed by /on	Library	Budget	Status
<input type="checkbox"/>	Changes, by Jim Butcher [edit] © 2011 ; ISBN:0451463471 ; Published by Roc	Engard, Nicole		NIC		Pending
<input type="checkbox"/>	Storm Front, by Jim Butcher [edit] ; BK	Engard, Nicole		NIC		Pending
<input type="checkbox"/>	Practical Open Source Software for Libraries, by Nicole C. Engard [edit] © 2011 ; Published by Chandos I saw this at a conference and thought it would be helpful.	Engard, Beau		NIC		Pending
<input type="checkbox"/>	Test [edit]	Engard, Nicole		NIC		Pending

Mark selected as: -- Choose a status -- with this reason: -- Choose a reason -- OR: Delete selected ☐

Submit

-- Choose a status --
Pending
Accepted
Checked
Rejected

Another option for libraries with long lists of suggestions is to approve or reject suggestions one by one by clicking on the title of the suggestion to open a summary of the suggestion, including information if the item was purchased.

Bibliographic information

Title: Practical Open Source Software for Libraries
Author: Nicole C. Engard
Copyright date: 2010
ISBN or ISSN or other standard number: unknown
Publisher: Chandos
Publication place: UK
Collection title: Test
Document type:
Reason for suggestion:
Notes: As the author of this book I have to recommend it.

Suggestion management

Status: No Status

	Date	By
Suggestion creation	04/01/2011	Engard, Nicole NIC (Staff)
Suggestion management	05/22/2012	Engard, Nicole NIC (Staff)
Suggestion accepted	09/07/2011	Engard, Nicole NIC (Staff)

Acquisition information

Library: Nicole's Library
Budget: Non Fiction
Copies: 2
Currency: USD
Price: 99.00
Total 198.00

[<<Back to the list](#)

Clicking 'edit' to the right of the suggested title will open a suggestion editing page.

Edit purchase suggestion #10

Bibliographic information

Title: Practical Open Source Software for Libraries

Author: Nicole C. Engard

Copyright date: 2011

ISBN or ISSN or other standard number:

Publisher: Chandos

Publication place:

Collection title:

Document type:

Reason for suggestion: Upcoming title by popular author

Notes: I saw this at a conference and thought it would be helpful.

Suggestion management

Status: Pending

Suggestion creation date: 05/22/2012

Suggestion management: 05/22/2012

Suggestion accepted:

By: Engard, Beau FFL (Juvenile)

By: Engard, Nicole NIC (Staff)

From this form you can make edits to the suggestion (adding more details or updating incorrect information provided by the patron). You can also choose to accept or reject the suggestion on an individual basis.

- Choosing to mark a request as 'Pending' will move the request back to the 'Pending' tab.

Reasons for accepting and rejecting suggestions are defined by the **SUGGEST** authorized value.

with this reason: -- Choose a reason --

-- Choose a reason --

Available via ILL

Bestseller

Library Copy Lost

Shelf Copy Damaged

Others...

If you choose 'Others...' as your reason you will be prompted to enter your reason in a text box. Clicking 'Cancel' to the right of the box will bring back the pull down menu with authorized reasons.

with this reason: [Cancel](#)

Once you have clicked 'Submit' the suggestion will be moved to the matching tab. The status will also be updated on the patron's account in the OPAC and an **email notice** will be sent to the patron using the template that matches the status you have chosen.

My Purchase Suggestions

[Select All](#) [Clear All](#) | [New purchase suggestion](#)

	Summary ▼	Note	Managed by	Status
	Practical Open Source Software for Libraries Nicole C. Engard, - 2010, - Chandos (UK)			Requested
	Road Trip USA - 2008,	would be a great pick	Engard, Nicole	Accepted by the library (Library Copy Lost)
	The Importance of Open Access, Open Source, and Open Standards for Libraries --		Engard, Nicole	Accepted by the library (Bestseller)

[Delete Checked Items](#)

8.4 Placing Orders

To place an order you must first search for the vendor or bookseller you want to send the order to.

8.4.1 Create a basket

To create a basket you must first search for the vendor you're ordering from:

+ New ▼
Edit vendor
Receive shipments

Amazon
New basket
Receive shipment

Basket (#) ▲	Item count ▼	Biblio count ▼	Items expected ▼	Created by ▼	Date ▼	
PO373728 (#3)	1	1	0	Nicole Engard	10/14/2012	closed on 10/14/2012 View
PO37772929 (#2)	2	2	1	Nicole Engard	10/13/2012	closed on 10/13/2012 View
PO77662 (#4)	1	1	0	Nicole Engard	10/25/2012	View

Next to the vendor name you will see a 'New Basket' button

Add a basket to Amazon

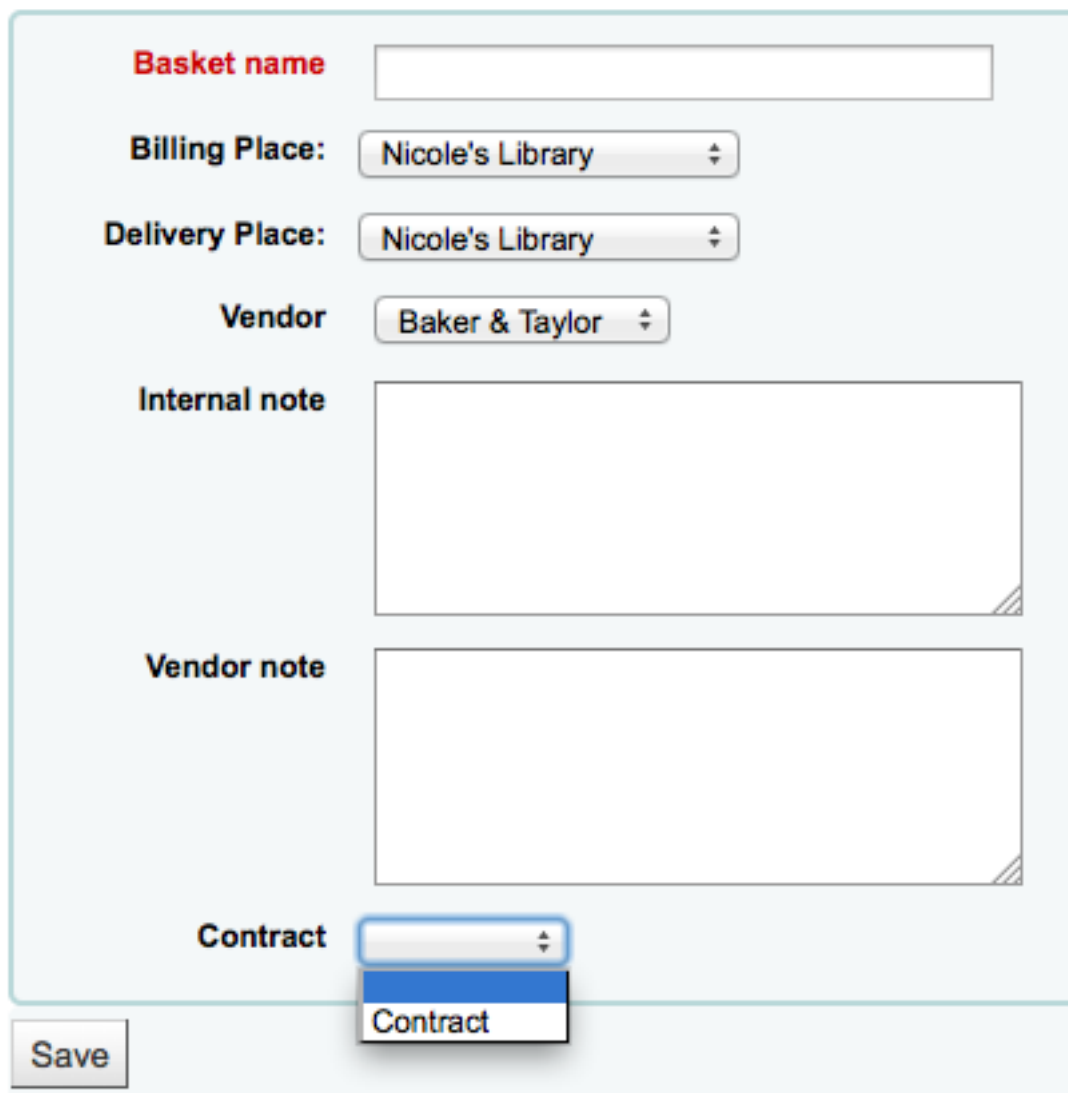
The screenshot shows a web form titled "Add a basket to Amazon". The form is contained within a light blue border. It has the following fields:

- Basket name**: A text input field.
- Billing Place:**: A dropdown menu showing "Nicole's Library".
- Delivery Place:**: A dropdown menu showing "Nicole's Library".
- Vendor**: A dropdown menu showing "Amazon".
- Internal note**: A large text area.
- Vendor note**: A large text area.
- Save**: A button at the bottom left.

- When adding a basket you want to give it a name that will help you identify it later
- Enter in the Billing Place and Delivery Place (this will default the library you're logged in at)
- If you would like to change the vendor you're ordering from you can use the Vendor pull down menu
- The notes fields are optional and can contain any type of information

If you have **added contracts** to the vendor you're ordering from, you will also have an option to choose which contract you're ordering these items under.

Add a basket to Baker & Taylor



The form is titled "Add a basket to Baker & Taylor". It contains several fields for data entry:

- Basket name:** A text input field.
- Billing Place:** A dropdown menu with "Nicole's Library" selected.
- Delivery Place:** A dropdown menu with "Nicole's Library" selected.
- Vendor:** A dropdown menu with "Baker & Taylor" selected.
- Internal note:** A large text area for internal notes.
- Vendor note:** A large text area for vendor notes.
- Contract:** A dropdown menu with a blue highlight and a "Contract" option visible in the dropdown list.
- Save:** A button at the bottom left of the form.

When finished, click 'Save'

Basket 2323 (71) for Baker & Taylor

Delivery place: South Branch
Billing place: South Branch
Managed by: Nicole Engard
Opened on: 09/10/2013

Add order to basket

- From an existing record:
- [From a suggestion](#)
- [From a subscription](#)
- [From a new \(empty\) record](#)
- [From an external source](#)
- [From a staged file](#)

Once your basket is created you are presented with several options for adding items to the order.

- If you are ordering another copy of an existing item, you can simply search for the record in your system.

Search existing records

3 results found

Summary	Publisher	Copyright		
Library mashups : 9781573873727 (pbk.) 1573873721 (pbk.) - xvii, 334 p. : ; 23 cm.	Information Today, Inc., ; Medford, N.J. :	2009	View MARC	Order
Piping out Library Data by Engard, Nicole C., : Test ; 8			View MARC	Order
Tu shu guan "hun da" : by Engard, Nicole C., 9787562459835 7562459835 - 294 p. : : Ying wen ti ming qu zi ban quan ye. ; 23 cm.	Chongqing da xue chu ban she, ; Chongqing :	2011	View MARC	Order

- From the results, simply click 'Order' to be brought to the order form.

New order

Basket details

Managed by: Nicole Engard
Open on: 11/09/2011

Catalog details [Edit record](#)

Title Library mashups :
Author:
Publisher: Information Today, Inc.,
Edition:
Publication year: 2009
ISBN: 9781573873727 (pbk.) | 1573873
Series:

* All of the details associated with the item will already be listed under 'Catalog details.'

- If you allow patrons to make purchase suggestions (learn more in the [Managing Suggestions](#) section of this manual), then you can place orders from those suggestions. In order to keep track of suggestions that have been ordered and received you must place the order using this link.

Suggestions

Showing 1 to 2 of 2	Show <input type="text" value="10"/> entries	⏪ ⏩ ⏴ ⏵	Search: <input type="text"/>
Suggestion	Suggested by	Accepted by	
Changes - Jim Butcher copy. year:2011 ISBN :0451463471 published by:Roc	Engard, Nicole	Engard, Nicole	Order
The Reader's digest. - published by:The Reader's Digest Association]	Engard, Nicole	Engard, Nicole	Order

Showing 1 to 2 of 2
 ⏪ ⏩ ⏴ ⏵

- From the results, click 'Order' next to the item you want to order and you will be presented with the order form including a link to the suggestion

New order

Basket details

Managed by: Nicole Engard
Open on: 05/03/2012

Catalog details

Title: Practical Open Source Software for Libraries
Author: Nicole C. Engard
Publisher: Chandos
Edition:
Publication year: 2010
ISBN:
Series:

Suggestion

Suggested by: Engard, Nicole ([suggestion #3](#))

- * From this form you can make changes to the Catalog Details if necessary.
- * When the item appears in your basket it will include a link to the suggestion.

Basket suggest (24) for Amazon

Managed by: Nicole Engard
 Opened on: 05/03/2012

Order Details

Order	RRP	Est.	Qty.	Total	Fund	Modify	Delete
Practical Open Source Software for Libraries by Nicole C. Engard , Chandos Suggested by: Engard, Nicole (suggestion #3) [Add note]	99.00	99.00	1	99.00	Non Fiction	Modify	Delete order Delete order and catalog record
Total (USD)	99.00		1	99.00			

- Orders added to the basket in this way will notify the patron via email that their suggestion has been ordered and will update the patron's **'My purchase suggestions'** page in the OPAC.
- If you're using the **Serials** module you can link your subscription order information to acquisitions by choosing to order 'From a subscription'
- After clicking the order link you will be brought to a search page that will help you find your subscription

Advanced search

ISSN:

Title:

EAN:

Publisher:

Supplier:

Branch:

Serials subscriptions

Use the search form on the left to find subscriptions.

- Your results will appear to the right of the form and each subscription will have an 'Order' link to the right

Serials subscriptions

☐ Show only renewed

Showing 1 to 3 of 3 Show entries Search:

ISSN	Title	Notes	Library	Call number	Expiration date	
1041-7915	Computers in libraries.		M	MAG	12/15/2014	Order
1041-7915	Computers in libraries.		M	MAG	01/01/2013	Order
1041-7915	Computers in libraries.		E		01/01/2014	Order

Showing 1 to 3 of 3

- Clicking 'Order' will bring the subscription info in to the order form without an 'Add item' section since you are just ordering a subscription and an item isn't needed

New order

Basket details

Managed by: Nicole Engard

Open on: 09/10/2013

Catalog details [Edit record](#)

Title Computers in libraries.

Author:

Publisher: Meckler,

Edition:

Publication year: 1988

ISBN:

Series:

Accounting Details

Quantity:

Fund: Show all: ☐

Currency:

Vendor price:

- To order from a record that can't be found anywhere else, choose the 'From a new (empty) record.'

New order

Basket details

Managed by: Nicole Engard
Open on: 11/09/2011

Catalog details

Title:
Author:
Publisher:
Edition:
Publication year:
ISBN:
Series:

- You will be presented with an empty form to fill in all of the necessary details about the item you are ordering.
- If you want to search other libraries for an item to purchase, you can use the 'From an external source' option that will allow you to order from a MARC record found via a Z39.50 search.

Z39.50 Search Points

Title:
ISBN/ISSN:
LC Call Number:

Author:
Subject Heading:
Dewey:

Select used MARC framework:

Search targets [Select All](#) [Clear All](#)

- ☐ NEW YORK UNIVERSITY LIBRARIES [bobcat.nyu.edu]
☐ NEW YORK PUBLIC LIBRARY [catnyp.nypl.org]
☐ COLUMBIA UNIVERSITY [clio-db.cc.columbia.edu]
☐ SMITHSONIAN INSTITUTION LIBRARIES [siris-libraries.si.edu]
☒ LIBRARY OF CONGRESS [z3950.loc.gov]

[Cancel](#)

- From the results, click the Order link next to the item you want to purchase.

Results

Server	Title ▾	Author ⇅	ISBN ⇅	LCCN ⇅	Preview	
LIBRARY OF CONGRESS	Change of heart :	Picoult, Jodi,	9780743496742 0743496744	2007035721	MARC Card Order	

- If the item you're ordering from an external source looks like it might be a duplicate, Koha will warn you and give you options on how to proceed.

Duplicate warning

You selected a record from an external source that matches an existing record in your catalog: [The tenth circle](#) /

Use existing record

Do not create a duplicate record. Add an order from the existing record in your catalog.

Create new record

Create a new record by importing the external (duplicate) record.

Cancel and return to order

Return to the basket without making a new order.

- * From the warning, you can choose to order another copy on the existing bib record, create a new bib record, or cancel your order of this item.
- In the order form that pops up, you will not be able to edit the catalog details.

New order

Basket details

Managed by: Nicole Engard

Open on: 11/09/2011

Catalog details [Edit record](#)

Title Change of heart :

Author: Picoult, Jodi,

Publisher: Atria Books,

Edition: 1st Atria Books hardcover ed.

Publication year: 2008

ISBN: 9780743496742 | 0743496744

Series:

- The final option for ordering is to order from a staged record ([learn more about staging records](#)).

Add orders from staged file:

File name	Comments	Status	Staged	# Bibs	
Pwebrecon.mrc	italy	staged	2009-12-14 06:19:57	1	Add orders

- From the list of files you are presented with, choose the 'Add orders' link.

Add orders from staged file: italy

File name: Pwebrecon.mrc

Staged on: 2009-12-14 06:19:57

#	Citation	Match?	Order
1	Italy, a cultural guide / Hauser, Ernest O., (0689111754)	no_match	Add order
<input type="button" value="Save"/>			

- * From the list of records, click 'Add order' next to the item that you want to add to your order.

New order

Basket details

Managed by: Nicole Engard
 Open on: 05/24/2012

Catalog details [Edit record](#)

Title: King Lear
 Author:
 Publisher: Project Gutenberg Literary Archive Foundation,
 Edition:
 Publication year: 1997
 ISBN:
 Series:

Item

2 - Source of classification or shelving scheme:
 3 - Materials specified (bound volume or other):

- From the order form, you will not be able to edit the catalog details.

- * The other option is to import all records from the staged file by scrolling below the list of records in the staged file and filling in the item information.

King Solomon's Mines	no_match	Add order
The Kingdom of God Is Within You	no_match	Add order
Knots, Splices and Rope Work	no_match	Add order

Import All

Import all the lines in the basket with the following parameters:

Item

2 - Source of classification or shelving scheme:
 3 - Materials specified (bound volume or other):

- If you choose this option the Koha will look in the 020\$c and grab the pricing information from that field and put that on each order line.

After bringing in the bib information, if your **AcqCreateItem** system preference is set to add an item when ordering you will enter the item info next. You need to fill out at least one item record and then click the 'Add' button at the bottom left of the item form.

Item

2 - Source of classification or shelving scheme
Library of Congress Classification

3 - Materials specified (bound volume or other part)

7 - Not for loan
Ordered

8 - Koha collection

a - Location (home branch)
Nicole's Library

b - Sublocation or collection (holding branch)
Nicole's Library

c - Shelving location

d - Date acquired
...

e - Source of acquisition

g - Cost, normal purchase price

h - Serial Enumeration / chronology

o - Koha full call number

p - Piece designation (barcode)
...

t - Copy number

u - Uniform Resource Identifier

v - Cost, replacement price

w - Price effective from

x - Nonpublic note

y - Koha item type
Books

z - Public note

Add item
Clear

After clicking the 'Add item' button below the item record the item will appear above the form and then you can enter your next item the same way (if ordering more than one item).

Items list

		Barcode	Home branch	Holding branch	Not for loan	Restricted	Location	Call number	Copy number	Stock number	Co
Edit	Delete		Centerville	Centerville	Ordered					undefined	

Item

2 - Source of

Once you have entered the info about the item, you need to enter the Accounting information.

Accounting Details

Quantity:

Fund: **Show all:** ☐

Currency:

Vendor price:

Uncertain price: ☐

gstrate:

Discount: %

Replacement cost: (adjusted for USD)

Budgeted cost:

Total: (budgeted cost * quantity)

Actual cost:

Notes:

The 2 following fields are available for your own usage. They can be useful for statistical purposes

Statistic 1:

Statistic 2:

Save

Cancel

- Quantity is populated by the number of items you've added to the order above.

IMPORTANT



You cannot edit the quantity manually, you must click 'Add' below the item form to add as many items as you're ordering.

- The list of funds is populated by the **funds** you have assigned in the Acquisitions Administration area.
- The currency pull down will have the **currencies** you set up in the **Acquisitions Administration** area.
- The vendor price is the price before any taxes or discounts are applied.
- If the price is uncertain, check the uncertain price box.
 - A basket with at least one uncertain price can't be closed.
- If you are charged sales tax, choose that from the gstrate field
- Enter the percentage discount you're receiving on this order, once you enter this, hit tab and Koha will populate the rest of the cost fields below.
- If you added Planning Values when **creating the Fund**, those values will appear in the two Planning Value fields.

Once an item is added to the basket you will be presented with a basket summary.

Basket 29118281 (35) for Amazon

Billing place: Nicole's Library
Managed by: Nicole Engard
Opened on: 09/28/2012
☐ Show all details

Order Details

Showing 1 to 1 of 1		Show	10	entries	First Previous Next Last		Search:			
Order	RRP tax exc.	ecost tax exc.	Qty.	Total tax exc. (USD)	GST %	GST	Fund	Modify	Delete	
Early to death, early to rise : by Harrison, Kim. - 9780061718175 (trade bdg.) 9 , Harper, , 1st ed. [Add note]	6.99	6.99	1	6.99	0.00	0.00	Fiction	Modify	Delete order Delete order and catalog record	
Total (GST 0.00)			1	6.99		0				
Total (USD)			1	6.99		0.00				

Showing 1 to 1 of 1		First Previous Next Last	
---------------------	--	--------------------------	--

Showing 1 to 1 of 1 First Previous Next Last

If you would like to see more details you can check the 'Show all details' checkbox

Basket 29118281 (35) for Amazon

Billing place: Nicole's Library
Managed by: Nicole Engard
Opened on: 09/28/2012
☒ Show all details

Order Details

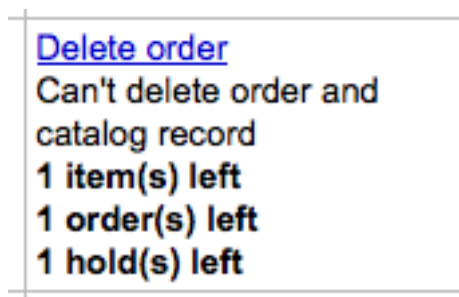
Showing 1 to 1 of 1		Show	10	entries	First	Previous	Next	Last	Search:			
Order	RRP tax exc.	ecost tax exc.	RRP tax inc.	ecost tax inc.	Qty.	Total tax exc. (USD)	Total tax inc. (USD)	GST %	GST	Fund	Modify	Delete
Early to death, early to rise : by Harrison, Kim. - 9780061718175 (trade bdg.) 9 , Harper , 1st ed. [Add note]	6.99	6.99	6.99	6.99	1	6.99	6.99	0.00	0.00	Fiction	Modify	Delete order Delete order and catalog record
Total (GST 0.00)					1	6.99	6.99		0			
Total (USD)					1	6.99	6.99		0.00			
Showing 1 to 1 of 1		First	Previous	Next	Last							

Showing 1 to 1 of 1 First Previous Next Last

From here, you can edit or remove the items that you have added.

- Choosing to 'Delete the order' will delete the order line but leave the record in the catalog.

- Choosing to 'Delete order and catalog record' removes both the order line and the record in the catalog.
 - The catalog record cannot always be deleted. You might see notes explaining why.



On the summary page, you also have the option to edit the information that you entered about the basket by clicking the 'Edit basket header information' button, to delete the basket altogether by clicking the 'Delete this basket' button, or to export your basket as a CSV file by clicking the 'Export this basket as CSV' button.



Basket December 2009 (12) for [Baker & Taylor](#)

Basket details

Internal note: 12th monthly order

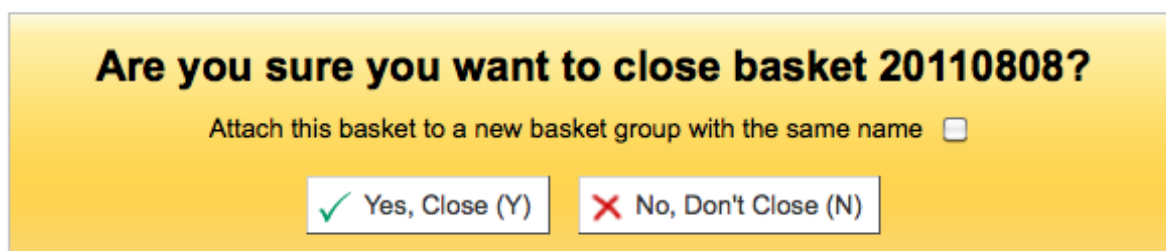
Contract number: 3

Contract name: [Fiction for 2009](#)

Managed by: Nicole Engard

Open on: 02/25/2010

Once you're sure your basket is complete, you can click 'Close this basket' button to indicate that this basket is complete and has been sent to the vendor. If you have your **BasketConfirmations** preference set to show a confirmation, you will be asked if you are sure about closing the basket.



When closing the basket you can choose to add the basket to a group for easy printing and retrieval. If you check the box to 'Attach this basket to a new basket group' you will be brought to the group list where you can print a PDF of the order.

Basket Grouping for Amazon

Basket Group	Action	
20110808	<input type="button" value="Reopen"/>	<input type="button" value="Print"/>
20110728	<input type="button" value="Reopen"/>	<input type="button" value="Print"/>

IMPORTANT

A basket with at least one item marked as 'uncertain price' will not be able to be closed.

Basket today's order (11) for Baker & Taylor

Basket details

Managed by: Nicole Engard

Open on: 02/25/2010



Order Details

Order	RRP	Est.	Qty.	Total	Fund	Modify	Delete
Computers in libraries. by Title from cover. Includes special editorial sections: Internet librarian; and: CD-ROM librarian. Latest issue consulted: Vol. 22, no. 7 (July/Aug. 2002). , Meckler,	10.00	10.00	1	10.00	General Stacks	Modify	Delete
The Software challenge // Understanding computers by Includes index. - 0809460580 0809460599 (lib. , Time-Life Books,	5.00??	5.00??	1	5.00??	General Stacks	Modify	Delete

Clicking the 'Uncertain Prices' button will call up a list of items with uncertain prices to quick editing. From that list, you can quickly edit the items by entering new prices and quantities.

Orders with uncertain prices for vendor [Baker & Taylor \(edit\)](#)

Contact information

Address: PO Box 1234 Bridgewater, NJ 08807-2944 1120 U.S. 22 Bridgewater, NJ 08807-2944 <http://www.btol.com/>

Phone: 555.555.1234 / Fax:

Contact:

Jane Doe Sales Manager 555.555.1233 jane@btol.com On Friday's contact John instead: 555.555.1222

Orders with uncertain prices

Orders from:

basket	order	by	uncertain	price	quantity
today's order	The Software challenge // Time-Life Books,, 0809460580 0809460599 (lib. edit)	Nicole Engard	<input checked="" type="checkbox"/>	<input type="text" value="5.000000"/>	<input type="text" value="1"/>
<input type="button" value="Save"/>					

IMPORTANT



The Uncertain Prices page is independent of the basket. It is linked to the vendor so you will see all items on order with uncertain prices for that vendor.

8.4.2 Create a basket group

A basket group is simply a group of baskets. In some libraries, you have several staff members that create baskets, and, at the end of a period of time, someone then groups them together to send to the vendor in bulk. That said, it is possible to have one basket in a basket group if that's the workflow used in your library.

8.4.3 Printing baskets

When you are finished adding items to your basket, click 'Close this Basket.'

<input type="button" value="Edit basket header information"/>	<input type="button" value="Delete this basket"/>	<input type="button" value="Close this basket"/>	<input type="button" value="Export this basket as CSV"/>
---	---	--	--

Basket Fiction Order (17) for [Borders](#)

Basket details

Managed by: Nicole Engard

Opened on: 05/01/2010

Order Details

Order	RRP	Est.	Qty.	Total	Fund
Practical Open Source Software for Libraries by Nicole C. Engard	10.00	10.00	1	10.00	Fiction
Total Tax Exc.	10.00		1	10.00	

You will be asked if you want to create a purchase order at this time.

Are you sure you want to close basket Fiction Order?

create a purchase order now? ☒

☒ Yes, Close (Y)
 ☐ No, Don't Close (N)

Your completed order will be listed on the Basket Grouping page for printing or further modification.

Basket Grouping for Borders

Opened Closed

another

Reopen Print

Basket Group n°4

Reopen Print

Fiction Order

Reopen Print

Clicking 'Print' below your order will generate a PDF for printing, which will have all of your library information followed by the items in your order.

Basket (N°)	Document	Qty	RRT GST Inc.	Discount	Discount price GST Exc.	GST	Total GST Inc.
17	Practical Open Source Software for Libraries / Nicole C. Engard,	1	10.00	0.00%	9.99	0.12%	10.00

8.5 Receiving Orders

Orders can be received from the vendor information page

Amazon

or the vendor search results page

Baker & Taylor						
		New basket		Receive shipment		
Basket (#)	Item count	Biblio count	Items expected	Created by	Date	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

After clicking 'Receive shipment' you will be asked to enter a vendor invoice number, a shipment received date, a shipping cost and a budget to subtract that shipping amount from.

Receive shipment from vendor Amazon

Receive a new shipment

Vendor invoice

Shipment date:

10/13/2012

(MM/DD/YYYY)

Shipment cost:

Budget:

No budget

Next

Cancel

The receive page will list all items still on order with the vendor regardless of the basket the item is from.

Receipt summary for Amazon [8765432] on 05/22/2012

Invoice number: 8765432 Received by: nce On: 05/22/2012

Pending orders

Basket	Order line	Summary	View record	Quantity	Unit cost	Order cost		
5	6	Korean-English Dictionary Note: order note [Change note]	MARC Card	1	10.00	10.00	Receive	Delete order Delete order and catalog record
26	106	My sister's keeper : by Picoult, Jodi, -- 0743454537 (pbk.) 9780743454 [Add note]	MARC Card	2	11.00	22.00	Receive	Delete order Can't delete order and catalog record 2 item(s) left
27	108	Change of heart : by Picoult, Jodi, -- 9780743496759 0743496752 : P Note: Originally published: New York : Atria Books, 2008. [Change note]	MARC Card	2	11.00	22.00	Receive	Delete order Can't delete order and catalog record 1 item(s) left
29	113	The Avengers. [Add note]	MARC Card	2	6.50	13.00	Receive	Delete order Delete order and catalog record
29	114	Harry Potter and the goblet of fire by Rowling, J. K. -- 0807282596 [Add note]	MARC Card	1	17.99	17.99	Receive	Delete order Can't delete order and catalog record 5 item(s) left 1 order(s) left 1 hold(s) left
TOTAL				8		84.99		

Already received

There are no received orders.

[Finish receiving](#)

To receive a specific item, click the 'Receive' link to the right of the item.

Receive items from : Baker & Taylor [5322312] (order #28)

Catalog details						Accounting details			
Title: Seer of Sevenwaters /						Date received: 07/10/2012			
Author: Marillier, Juliet.						Budget: Fiction			
Copyright: 2010						Created by: Nicole Engard			
ISBN: 0451463552 : HRD						Quantity to receive: <input type="text" value="1"/>			
Series:						Quantity received: <input type="text" value="1"/>			
						Replacement cost: <input type="text" value="24.95"/>			
						Budgeted cost: <input type="text" value="25.00"/>			
						Actual cost: <input type="text" value="22.00"/>			
						Notes: <div style="border: 1px solid black; height: 80px;"></div>			

Receive?	Barcode	Home branch	Holding branch	Not for loan	Restricted
<input checked="" type="checkbox"/>	Edit	Midway	Midway	Ordered	

From this form you can alter the cost information. You can also choose to mark only part of the order as received if the vendor didn't send your entire order by checking only the boxes next to the items on the left that you want to receive. The values you enter in the 'Replacement cost' and 'Actual cost' will automatically populate the item record by filling in subfield v (Cost, replacement price) and subfield g (Cost, normal purchase price) on the item record after saving.

Items for Seer of Sevenwaters / by Marillier, Juliet. (Record #5938)

	Withdrawn status	Damaged status	Not for loan	Permanent location	Current location	Date acquired	Source of acquisition	Cost, normal purchase price	Date last seen	Cost, replacement price	Price effective from	Koha item type
Edit Delete			Ordered	Midway	Midway	2012-07-10	3	22.00	2011-11-09	24.95	2012-07-10	Books

You can also make edits to the item record from this form by clicking the 'Edit' link next to each item. This will allow you to enter in accurate call numbers and barcodes if you'd like to do that at the point of receipt. Once you have made any changes necessary (to the order and/or items, click 'Save' to mark the item(s) as received.

Already received

Basket	Order line	Summary	View record	Quantity	Est cost	Actual cost	TOTAL
29	31	The Judas Gate /	MARC Card	1	16.17	16.00	16.00
29	36	Seer of Sevenwaters /	MARC Card	1	14.97	14.97	14.97
SUBTOTAL						30.97	30.97
TOTAL				2			30.97

When you're finished receiving items you can navigate away from this page or click the 'Finish receiving' button at the bottom of the screen.

You will also see that the item is received and/or cancelled if you view the basket.

Basket 2011-02-21 (2) for Amazon

Managed by: Nicole Engard

Opened on: 02/19/2011

Order Details

Order	RRP	Est.	Qty.	Total	Fund	Modify	Delete
(rcvd) <i>The tenth circle</i> / by Picoult, Jodi, - 074349671X (pbk.) 9780743496 , Washington Square Press, Note: Includes readers club guide (p.[6]-[20]). [Change note]	15.00	15.00	1	15.00	Fiction	Modify	Delete order Can't delete order and catalog record 2 item(s) left
Total (USD)	15.00		1	15.00			

Cancelled orders

Order	RRP	Est.	Qty.	Total	Fund
Korean-English Dictionary by Records generated from Project Gutenberg RDF data. ISO 639-2 language code: , Project Gutenberg Literary Archive Foundation,	5.00	5.00	1	5.00	Fiction
<i>Deleted bibliographic record, can't find title</i>	14.00	14.00	1	14.00	Fiction

8.6 Invoices

When orders are received invoices are generated. Invoices can be searched by clicking on 'Invoices' in the left of the Acquisitions page.

Search filters

Invoice no:

Supplier:

All

Shipment date

From:

To:

Billing date

From:

To:

ISBN / EAN / ISSN:

Title:

Author:

Publisher:

Publication year:

Branch:

All

Search

Invoices

Use the search form

After searching, your results will appear to the right of the search options.




Invoices

Invoice no. ▲	Vendor ◆	Billing date ◆	Received biblios ◆	Received items ◆	Status ◆	
654321123	Amazon		1	1	Open	Details / Close

From the results you can click the 'Details' link to see the full invoice or 'Close' to note that the invoice is closed/paid for.

Invoice: 654321123

Supplier: Amazon

Shipment date: 
 Billing date: 
 Shipment cost: Budget: 
 Status: Open.
☐ Close

[Go to receipt page](#)

Invoice details

Summary ▲	Publisher ◆	Branch ◆	RRP ◆	Est. ◆	Qty. ◆	Total ◆	Fund ◆
The accidental library manager / by Gordon, Rachel Singer.			11.00	11.00	1	11	Professional Development
Total Tax Exc.			11.00		1	11.00	
Tax (0.00%)			0.00			0.00	
Total Tax Inc. (USD)			11.00		1	11.00	
Total + Shipment cost (USD)					1	16.00	


8.7 Claims & Late Orders


If you have entered in an email address for the vendors in your system you can send them claim emails when an order is late. Before you can send claims you will need to set up an **acquisitions claim notice**.

Upon clicking on the link to 'Late Orders' from the Acquisitions page you will be presented with a series of filter options on the left hand side. These filters will be applied only closed baskets.

Filter Results:

Order date:
 days ago

Estimated Delivery date from:
 
 (MM/DD/YYYY)

To:
 
 (MM/DD/YYYY)

Vendor:

NOTE

The vendor pull down only shows vendors with closed baskets that are late.

Once you filter your orders to show you the things you consider to be late you will be presented with a list of these items.

Late orders

Claim using notice:

Order date	Estimated delivery date	Vendor	Information	Total cost	Basket	Claims count	Claimed date	
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	The lost gate : <i>Author:</i> Card, Orson Scott. <i>Published by:</i> Tor,	5.99x2 = 11.98 Fiction	24 NIC	0		<input type="checkbox"/>
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	The lost gate : <i>Author:</i> Card, Orson Scott. <i>Published by:</i> Tor,	24.99x1 = 24.99 Fiction	24 NIC	0		<input type="checkbox"/>
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	To have and to kill / <i>Author:</i> Clark, Mary Jane Behrends. <i>Published by:</i> William Morrow,	24.99x1 = 24.99 Fiction	24 NIC	0		<input type="checkbox"/>
(3) 03/11/2012 (29 days)	03/14/2012	Baker & Taylor	The Waxman murders / <i>Author:</i> Doherty, P. C. <i>Published by:</i> Minotaur Books,	25.99x1 = 25.99 Fiction	24 NIC	0		<input type="checkbox"/>

To the right of each late title you will be see a checkbox. Check off the ones you want a claim letter sent to and click 'Claim Order' at the bottom right of the list. This will automatically send an email to the vendor at the email address you have on file.

NOTE



The Estimated Delivery Date is based on the Delivery time value entered on the vendor record.

If you would rather use a different acquisition claim letter (other than the default) you can **create that in the notices module** and choose it from the menu above the list of late items.

Claim using notice: **Acquisition Claim**

Order Date **Acquisition Claim** **Vendor**

8.8 Acquisition Searches

At the top of the various Acquisition pages there is a quick search box where you can perform either a Vendor Search or an Order Search.

Search vendors:

Vendor search Orders search

In the Vendor Search you can enter any part of the vendor name to get results.

Search vendors:

Vendor search Orders search

Vendor b

You searched on vendor b, 2 results found

Choose a vendor in the list to jump directly to the right place. **Baker & Taylor**

Baker & Taylor

Basket (#) ▲	Item count ◆	Biblio count ◆	Items expected ◆	Created by ◆	Date ◆	
PO12342212 (#14)	0	0	0	Nicole Engard	11/09/2011	View
PO123423 (#24)	27	26	27	Nicole Engard	03/11/2012	closed on 03/11/2012 View
PO39092190 (#15)	25	24	21	Nicole Engard	11/09/2011	View
PO647938224 (#18)	25	25	25	Nicole Engard	11/19/2011	View

Using the Orders Search you can search for items that have been ordered with or without the vendor.

Search orders:

Title: Vendor: [Advanced search](#)

Vendor search **Orders search**

You can enter info in one or both fields and you can enter any part of the title and/or vendor name.

Search orders:

Title: Vendor: [+] Submit Advanced search

Vendor search Orders search

1 Search results

Search results

Showing 1 to 9 of 9 Show 10 entries

Basket	Basket group	Invoice number	Order number	Summary	Vendor	Placed on	Received on	Quantity ordered	Unit cost
20110728 (10)	20110728 (1)	31143242	11	Social software in libraries : Farkas, Meredith G., 9781573872751 (pbk.) 1573872	Amazon	07/27/2011	10/02/2011	2	34.00
20110728 (10)	20110728 (1)	31143242	12	Library mashups : 9781573873727 (pbk.) 1573873	Amazon	07/27/2011	10/02/2011	1	25.00
3 (27)	()	2121	109	Practical open source software for libraries / Engard, Nicole C., 9781843345855 1843345854	Amazon	03/19/2012	03/19/2012	1	99.00

Clicking the plus sign to the right of the Vendor search box will expand the search and allow you to search for additional fields.

Search orders:

Title: Vendor: [-] Submit Advanced search

Basket: Invoice no.:

Vendor search Orders search

Clicking Advanced Search to the right of the search button will give you all of the order search options available.

Search Orders

Title:


Author:


ISBN:

Vendor:

Basket:

Bookseller invoice no:

From: 
(MM/DD/YYYY)

To: 
(MM/DD/YYYY)

Search

8.9 Budget/Fund Tracking

On the main acquisitions page there will be a table on the right showing you all of your active funds and a breakdown of what has been ordered or spent against them.

All available funds for Nicole's Library branch

Fund	Owner	Branch	Amount	Ordered	Spent	Avail
FIC	Nicole Engard	Nicole's Library	5,000.00	1,317.81	394.43	3,287.76
NFIC		Nicole's Library	2,500.00	26.00	187.95	2,286.05

Clicking on the linked amounts under spent or ordered will show you a summary of the titles ordered on that budget.

Fund: FIC

Spent

Title	Order	Vendor	Invoice	Itemtype	Received	Unit Price	Freight per Item	Date Ordered	Date Received	Subtotal
The tenth circle /	3	1	3456	BK	1	15.00	0.00	02/19/2011	06/11/2011	15.00
Korean-English Dictionary	7	1	12345432		1	10.00	0.00	04/30/2011	08/05/2011	10.00
Harry Potter and the deathly hallows	8	1	2343212	CDBK	1	16.00	0.00	05/25/2011	05/25/2011	16.00
Harry Potter and the deathly hallows	9	1	4567890-9	CDBK	1	15.00	0.00	07/19/2011	07/27/2011	15.00
Practical Open Source Software for Libraries.	10	1	0987654	BK	1	100.00	0.00	07/19/2011	07/19/2011	100.00
Library mashups :	12	1	31143242	BK	1	20.00	0.00	07/27/2011	10/02/2011	20.00
Storm front /	15	1	3245423	BK	1	9.99	0.00	09/07/2011	09/07/2011	9.99
The Waxman murders /	20	3	3121		1	25.99	0.00	11/09/2011	12/13/2011	25.99

