



Evergreen Acquisitions - First Look

Is Evergreen Acquisitions right for your library?

Acquisitions is one of Evergreen's most versatile functions, allowing libraries to pick and choose the level of use that best suits their needs. With a little training and setup, the Acquisitions function can help organize, track, and account for much of the library's materials ordering. Here are the main benefits of the function:

- Import MARC records from the vendor's website to create "on-order records" in the catalog.
- Keep all purchase orders and invoices in one place.
- Keep track of available/expended funds.
- Send purchase orders electronically to vendors directly from Evergreen.

Levels of Use

The Acquisitions function can essentially be used at three levels of complexity, in order of easiest to most complex.

- **Order Only** - Allows on-order records to appear in the catalog. This lets patrons see and place holds on incoming items. Involves downloading MARC records from a vendor and uploading them into Evergreen.* When the items arrive, the on-order item records can be converted to regular item records.
- **+ Fund Tracking** - In addition to uploading on-order records, Evergreen also allows for libraries to track spending as broadly or specifically as needed through the addition of *Funds*. Purchase orders and invoices can be created to mark funds encumbered and spent. Fund information is updated in real time on the statistics dashboard.
- **+ EDI** - In addition to uploading on-order records, Evergreen can create purchase orders to be sent to the vendor.** Vendors will then send an electronic invoice to Evergreen when the items have been shipped. Using EDI requires some additional setup in Evergreen and on the vendor's site. Because purchase orders and invoices are sent automatically, many libraries who use EDI also track funds. Historically, larger libraries use EDI, but it can also be beneficial for smaller libraries.

NOTE: All three levels of use also require setup on the vendors' websites. As in Evergreen, setup increases in complexity for each level.

*Baker & Taylor, Midwest, and Ingram are the three major vendors that let you download MARC records for the catalog. If your main vendor is not of these three, getting your on-order records in the system may require extra work.

** Currently, the only three vendors who are setup with EDI are Baker & Taylor, Ingram, and Midwest.

Moving Forward

If Acquisitions is something your library would like to pursue, please contact the Library Applications department at C/W MARS. We can help you decide on which level of use is best suited for your library at the moment and begin the training process.

[C/W MARS Contact info]

Depending on your level, we will provide you with one of the following documents on **Preparing for Evergreen Acquisitions**, which we have available on the staff site. If you're interested in what setup entails for each level, please feel free to take a look at them.

[Insert links to Preparing for Acquisitions Documents, (Order Only, Fund Tracking, EDI)]

Evergreen Acquisitions is flexible and easily allows for adding higher levels at a later date. Below are four examples of how libraries have chosen to use Evergreen Acquisitions. Notice how one may start with the most complex level but others might add levels as they become more comfortable.

Library Use Examples

Order Only

The Elric Public Library orders a fair number of materials from vendors such as Midwest Tape and Baker & Taylor. They are very comfortable working with the vendors' websites and would like to keep the same workflow. However, they would like to have on-order records appear in the catalog so that their patrons can see what is on the way and place holds.

Setup was simple: they created a provider, (vendor), in Evergreen with MARC field information and set up the vendor's website to match. From there, their workflow looks like this:

- Create order on vendor's website.
- Download order records.
- Import into Evergreen.

They started with one vendor to get use to the workflow but soon added all their vendors because they became comfortable very quickly.

Fund Tracking

The Fillory Library is a medium sized library that orders from a variety of vendors and doesn't want to change their ordering workflow on the vendors' websites. They already use Evergreen Acquisitions to get on-order records in the catalog and would like to start using it to keep track of spending on individual items. They've heard about the real-time fund tracking available on the Statistics Dashboard and thought it would be beneficial for each department to use as they're deciding what to order.

Setup required a few more steps. They created specific providers, (vendors), provider MARC field info, funding sources, and funds in Evergreen. In addition to the MARC field info they've already provided to their vendor, they then set up and provided the vendors with their fund codes. Fillory will have the following workflow:

- Create order on vendor's website.
- Download order records.
- Import into Evergreen.
- Create/activate purchase orders.
- Receive physical items from vendor.
- Create invoices and mark items received in Evergreen.
- Keep track of funds expended and remaining.

Fillory first started using Evergreen Acquisitions to upload on-order records. Once they became comfortable with the process, they added fund tracking. By creating blanket purchase orders and invoices, Fillory is also able to keep track of other purchases such as databases and museum passes. Note that if your library does not need to track individual item expenditures, these blanket orders can also be used to broadly track fund usage.

EDI

The Prescott Free Library uses multiple vendors and requires strict accounting linked to individual funding sources such as town/state allocations, gifts, and trusts. They would like to keep all accounting and ordering under one interface and so decide to use Evergreen Acquisitions with EDI. They haven't used the function but have heard good things about libraries using it to upload their on-order records.

Setup here is, (relatively), the most complex. Prescott set up their providers, provider MARC field info, funding sources, and funds in Evergreen. They also entered the appropriate MARC information on the vendors' websites. In addition to this, they also needed to set up EDI. EDI requires information provided by the vendor, which can then be entered into Evergreen. Once this is all set, and after a trial run with each vendor to make sure the EDI accounts were running correctly, Prescott uses the following workflow:

- Create, (but not submit), order on vendor's website.
- Download order records.

- Import into Evergreen.
- Create/activate purchase orders.
- Wait for EDI message and invoice.
- Receive physical items from vendor.
- Mark items received in Evergreen.
- Keep track of fund expended and remaining.

EDI (non fund tracking)

It is also possible to use EDI to order through Evergreen Acquisitions without using its added benefits to track funds.

The Enfield Public Library orders a great deal of books from Ingram and Baker & Taylor. They do all their ordering online on the vendors' websites and are having trouble keeping up with all the purchases and staying organized. Enfield already uses Evergreen Acquisitions to upload their on-order records, and so they decide that adding EDI will help keep all their ordering better organized, but they do not need to use the function to keep track of spending.

Setup was fairly simple. Since they've already set up the provider MARC field information in Evergreen as well as on the vendors' websites, they just needed to contact their vendors to provide EDI information. After a test run with each vendor is made to ensure that everything is running correctly, they have the following workflow:

- Create, (but not submit), order on vendor's website.
- Download order records.
- Import into Evergreen.
- Create/activate purchase orders.
- Wait for EDI message and invoice.
- Receive physical items from vendor.
- Mark items received in Evergreen.