

Sierra Acquisitions – 2 day training

The acquisitions-related functions in Sierra enable you to manage all aspects of ordering materials, including entering and sending orders, receiving ordered items, claiming or canceling orders, and processing invoices. These functions also enable you to manage and track your library's finances, including the ability to generate and print accounting reports, adjust funds, maintain fund and vendor information, and create statistical reports on vendors.

Underlined segments in this agenda are web hyperlinks. Please click on the link to be directed to the appropriate page in Sierra WebHelp. If you encounter difficulty following the links, try the links on Chrome, or go directly to <http://csdirect.iii.com/sierrahelp>, log in and search for the topic.

This schedule is flexible and subject to change.

Introduction

- Introduction of trainer and trainees
- [Logging into the Sierra Desktop Application](#)

[Record types](#)

- [Record types created in acquisitions functions](#)
 - [Fixed-length fields in bibliographic records](#)
 - [Fixed-length fields in order records](#)
 - [Fixed-length fields in vendor records](#)
 - [Variable-length fields](#)
 - [Variable-length fields in bibliographic records](#)
 - [Variable-length fields in order records](#)
 - [Variable-length fields in vendor records](#)
- [Bibliographic record display and Order record display](#)

[Creating vendor records](#)

- [Grouping vendors](#)
- [Preparing for electronic ordering](#)

Maintaining Funds

- [Accounting units or serials check-in units](#)
- [Creating fund records](#)
- [Changing appropriations, encumbrances, and expenditures in the fund adjustment table](#)
- [Grouping funds](#)

[Creating bibliographic records](#)

- Create brief bibliographic record for acquisitions
- Transfer bibliographic records from a bibliographic utility
 - [Transferring files in data exchange](#) (Batch loading of record files)

Acquisitions Training Agenda

- Searching for records in a remote database (Z39.50 records download)

Creating order records

- Creating single-copy multi-fund orders
- Creating blanket purchase orders
- Using Quick Click ordering (Workflow Discussion)
- GOBI API (Workflow Discussion)

Sending orders to vendors

- Electronic ordering overview
- Queuing purchase orders
- Printing purchase orders

Maintaining records (order and other record types)

- Editing records in Sierra
- Special considerations for editing order records
- Transferring attached records
- Adding messages to order records
- Using email reminders in order records
- Copying records
- Processing EDIFACT status reports (discussion)

Receiving acquisitions

- Receiving orders and creating items
- Receiving orders using rapid update

Claiming and cancelling orders

- Searching for claimable records
- Cancelling orders upon notification (from vendor)
- Claiming or cancelling a specific order
- Printing claims and cancellations
- Suppressing bibliographic records during order cancellation

Posting encumbrances and cancellations

Invoicing

- Creating invoices
 - Entering invoices using blanket purchase orders
 - Suspending invoice processing
 - Making partial payments

Acquisitions Training Agenda

- Entering a line item that has no order record (X records)
- Entering a line item that is not prorated (Y records)
- Credit memos
- Electronic invoice and approval processing
- Posting an invoice processing session
- Searching invoices

Encore display

- Display of bibliographic and order data in Encore

Reports and statistics in Acquisitions

- Creating lists (review files)
- Viewing financial reports
 - Printing financial reports for funds
 - Generating fund activity reports
- Vendor statistics
- Electronic invoice processing reports and logs
- Using statistics
 - Creating reports -- order record reports
 - Collection Development reports
 - Age of Collection reports
 - High-demand holds reports

Managing Acquisitions

Year-end closing procedures

- Fiscal closing at the end of the fiscal year
- Deleting fund records
- Delete records (order records)
- Archiving purged order records
- Changing the estimated price for serials

Preparing to go live

- Managing templates for new records (bibliographic)
- Managing templates for new records (order)
- Discussion of what to do to prepare for going live with acquisitions

Supporting Documentation

- Sierra WebHelp – Browse Tab
- Sierra Knowledge Base

Acquisitions Training Agenda

Please feel free to evaluate your training experience by filling out the [Training Survey](#) form.

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