

Sample Acquisitions Workflow for incoming items:

Creating an Order:

acqui-home.pl (or header's Vendor Search function)

Enter [partial] Vendor Name-> search query passed to booksellers.pl

booksellers.pl

Table: Vendor Search results (vendors with similar names).

Select table links to:	Create <u>New Basket</u>	-> basketheader.pl
	<u>Receive Shipment</u>	-> parcels.pl
	[Manage] <u>Vendor</u>	-> supplier.pl
	<u>View</u> basket	-> basket no. passed to basket.pl

Select Vendor -> supplier id passed to supplier.pl

supplier.pl

New basket -> booksellerid passed to basketheader.pl

basketheader.pl

Create basket name and Save -> basket no. passed to basket.pl

basket.pl

Name of basket, basket no. and <VENDOR NAME>

Basket details: Notes, "Manager" and date opened.

Order details: "Basket empty" if new basket.

Select: Add Order to Basket (several methods)

Passes booksellerid and basket no. to the following:

By <u>Suggestion</u>	-> newordersuggestion.pl
Create <u>New Record</u>	-> neworderempty.pl
Find with <u>external search</u>	-> Z3950_search.pl
From <u>Staged</u>	-> addorderiso2709.pl

neworderempty.pl

Item is created with Catalog Details: Title, Author, Publisher, Pub.Date, Series

Item Details: Lost Status, Damaged Status, Shelving Location, Date Acquired,
Barcode, Replacement Price, Koha item type, Note

Accounting Details: Quantity, Fund, Vendor Price, Replacement & Actual Costs

Note: Replacement cost is listed twice, in Item Details and Accounting Details.
Provides potential for two different replacement costs for the item.

Save -> Passes basket no. to basket.pl.

– order creation completed –

Receiving an Order:

Either: Search for Vendor Name using booksellers.pl (see above)

or Select the link to the Vendor in basket.pl -> supplier id passed to supplier.pl (see above)

From supplier.pl, Select “Manage orders” menu > Receive shipments -> parcels.pl

parcels.pl => acqui/parcels.pl

Table: Receive shipment from <VENDOR NAME>

Line #, Date Received, Invoice Number, Item Count, Biblio and Expected Counts

“Date Received” links to parcel.pl by type, supplierid, & date received

parcel.pl => acqui/parcel.tt

Receipt Summary for <VENDOR NAME> on <DATE REC'D>

Table: Pending Orders (*sorted by orderline number*)

Basket [Number] -> Number links to basket.pl, record

Order Line [Number] -> Number links to neworderempty.pl, item

Summary [Title] by [Author]

View MARC [only modified MARC?]

View Card [javascript mini-Marc]

Quantity [no. of items for this title]

Unit Cost

Order Cost

Select: Receive > orderreceive.pl, or Cancel > Remove item with parcel.pl

Table: Already Received items

Same table info. as Pending Orders with two exceptions:

Est. Cost replaces Unit Cost

Actual Cost replaces Order Cost

orderreceive.pl => acqui/orderreceive.tt

Catalog details (from title record, title MARC?)

Title, Author, Copyright, ISBN, Series

Accounting details (from item record)

Current Qty. of items to add to this title

Current Qty. of items possible to add

Item Replacement Cost

Item budgeted cost

Actual cost

Notes

Save or Cancel -> parcel.pl - *Cancel does not pass the shipment's “datereceived” back to parcel.pl*

Select Save: **finishreceive.pl** processes, sends to parcel.pl -> Item from Pending to Already Received.

– *end receiving process* –