# Sierra Acquisitions Parameters

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](http://csdirect.iii.com/sierrahelp/Default.htm).

This class schedule is flexible and subject to change.

## Introduction

* Introduction of trainer and trainees
* [Sierra Acquisitions basics](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_overview.html)
* Discussion of current library procedures pertinent to acquisitions
* Library’s budget cycle requirements
  + Fiscal year end date
  + [Fiscal year closing](http://csdirect.iii.com/sierrahelp/Content/sadmin/sadmin_options_acq_fiscal_year_closing.html)

## [Record types](http://csdirect.iii.com/sierrahelp/Default.htm#sril_records_types.html) used in [Acquisitions](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_create_recs.html)

* [Fixed-length fields](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_fixed_fields.html)
  + [Fixed-length fields in bibliographic records](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_fixed_field_types_biblio.html)
  + [Fixed-length fields in order records](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_fixed_field_types_order.html)
* [Variable-length fields](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_variable_fields.html)
* [Variable-length fields in bibliographic records](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_varfld_types_biblio.html)
* [Variable-length fields in order records](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_varfld_types_order.html)

## Funds

* [Fields in Sierra fund records](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_funds_fields.html)

# [Creating fund records](http://csdirect.iii.com/sierrahelp/Default.htm" \l "sgacq/sgacq_create_recs_fund.html)

* [Grouping funds](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_edit_group_fund.html)

## Vendors

* Fields in vendor records
  + [Fixed-length fields in vendor records](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_fixed_field_types_vendor.html)
  + [Variable-length fields in vendor records](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_varfld_types_vendor.html)
* [Creating vendor records](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_create_recs_vendor.html)
* [Using vendor message](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_files_use_vendor_messages.html)

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## [Preparing for Electronic Ordering](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_po_preparing.html)

* [Electronic ordering overview](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_pos.html)
* [Preparing vendor records for EDIFACT electronic ordering](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_po_preparing.html)
  + The vendor must provide a URL and username and password for access to their FTP directory and, if necessary, allow a connection from the Sierra server through their firewall.
  + Mandatory vendor record fields for EDIFACT ordering:

**VCODE 3** fixed field must have a “**d**”

**NOTE3** variable field must be present with $VENDSAN=<vendor san#>

**GIR** fixed field must have a code of 0,1,2,3 or 4

* + [Vendor SAN file](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_records_varfld_types_vendor.html) (NOTE3)

## Purchase order forms and claim forms

* [Sending electronic orders](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_po_elec.html) (EDIFACT) (discussion only)
* [Printing purchase orders](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_print_pos.html) (print) (discussion only)
* Formats of purchase orders, claim forms, and cancellation forms (discussion only)
* Printing with default output
* [Printing with print templates](http://csdirect.iii.com/sierrahelp/Default.htm#sgil/sgil_print_templates.html)
  + [Print templates (using iReport third-party software)](http://csdirect.iii.com/downloads/ireport.shtml)
  + [Customer wiki for print templates](http://csdirect.iii.com/lswiki/PrintTemplates/WebHome)

## Encore/ WebPAC display

* [SHOWREC](http://csdirect.iii.com/sierrahelp/Default.htm#sril/sril_record_display_options.html) -- the web option which controls display of order records in WebPAC/Encore

## Acquisitions Configuration Files and Tables

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|  | * [Claim cycle values table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_claim_cycles.html) * [External funds codes table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_ext_fund.html) * [Foreign currency codes and rates](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_forcur.html) * [Inventory express table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_inv_express.html) * [Library SAN file](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_lib_san.html) * [Multiselection groups table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_multiselection.html) * [Outputting vouchers configuration options](http://csdirect.iii.com/sierrahelp/Content/sril/sril_vouchers_config.html), optional product * [RLOC-BLOC addresses table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_libaddr.html) * [Use tax rates table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_usetax.html) * [Value added table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_valueadded.html) * [Vendor messages table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_vendor_msgs.html) * [Web links table](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_web_links.html) * [Web works selection lists review files](http://csdirect.iii.com/sierrahelp/Content/sril/sril_sys_param_webselect.html)  Acquisitions options in Sierra admin corner[A > Acquisitions Options](http://csdirect.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_acq.html) in Admin Corner Please feel free to evaluate your training experience by filling out the [Training Survey](http://csdirect.iii.com/contact/feedback_training.php) form.  This publication is supplied for the exclusive use of customers of Innovative Interfaces with the understanding that it shall not be shown or distributed to anyone outside of the customer's organization without the prior written permission of Innovative Interfaces. This publication may be copied only if the copies are for the exclusive use of staff members of libraries that have purchased the Innovative system. © 2014, Innovative Interfaces, Inc. |