Acquisitions Checklist

The following checklist is meant to be a guide to help you manage your Sierra System. **Note: It has not been created by MOBIUS staff, but by III for its customer service site, CSDirect. Therefore, not all of these steps are required; as stated below, they are merely suggestions.**

The frequencies we suggest are only recommendations. Your library may perform certain activities more or less often depending upon your needs and policies.

**Daily**

* View the [Acquisitions/Serials Status](http://csdirect.iii.com/sierrahelp/Default.htm#sadmin_admin_corner_statusacqser.html) screen and note the number of:
  + encumbrances ready to post
  + pay file records to post
  + Payment History file records ready for Fund Activity report
  + purchase orders to print
  + claims to print

This screen is accessed in the **Admin Corner**, from Main Menu > MANAGEMENT information > INFORMATION about the system > FILE information > ACQUISITIONS/SERIALS status

* [Post](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq_invoic_posting.html) (in **Pay an Invoice** function). Do not allow the total of all records to post (encumbrances plus records in a payfile) to exceed 2,000.

**Weekly**

* [Print Purchase Orders](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq_print_pos.html) with **Print/Send Orders** function.
* [Send electronic orders](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq_send_po_elec.html) with **Print/Send Orders** function.
* [Print Fund Activity reports](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq_funds_adjust_activityreport.html) in the **Funds** function, weekly (recommended) or monthly (at least) and clear the Payment History file. Do not allow the combined total of encumbrances to post, payfiles to post, and records in the Payment History file to exceed 10,000.

If funds are in balance, after printing the Fund Activity report, the user will have the option to clear the Payment History file. If the funds are not in balance, contact the Innovative Customer Services Department Help Desk.

* [Claim](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq_claim.html) overdue orders weekly (recommended) or monthly (at least) using the **Claiming** function or from within the order record.

Since the [claim cycle](http://csdirect.iii.com/manual/gmacq_files_maintain_claim_code.html) is calculated from the order date (ORD DATE) fixed field, irregular claiming may cause the system to repeatedly identify an order record as claimable. For example, if the claim cycle is every 30 days, and you do not send the first claim until 100 days after ordering, subsequent sessions will immediately present the same record for a second and third claim.

**Monthly**

* Create a list of orders that have receive dates but that have not yet been paid. Evaluate these orders for potential further action (corrections in the case of mistakes, follow-up with vendors in the case of unusual delays, etc.).
* Print [Web Management Fund reports](http://csdirect.iii.com/sierrahelp/Default.htm#sgwr_fund_reports.html) monthly or as needed.

**Yearly**

* Update order records to enable continued payment for ongoing subscriptions and standing orders.

**As needed**

* Generate [vendor statistics](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq_vendorstat.html) using the **Vendor Statistics** function.
* Update [vendor records](http://csdirect.iii.com/sierrahelp/Default.htm#sril_disp_vendor.html) in the **Vendors** function.
* Check the [Database and Log Status](http://csdirect.iii.com/sierrahelp/Default.htm#sadmin_admin_corner_system_status.html) to note the maximum number of order records allowed by the system and the current number of order records in the system. Delete order records before the system reaches its maximum. The Database and Log Status can be accessed in the **Admin Corner**, via Main Menu > MANAGEMENT information > INFORMATION about the system > FILE information > SYSTEM status
* Review [load tables and index rules](http://csdirect.iii.com/sierrahelp/Default.htm#sadmin_admin_corner_codes_used.html) to make sure all desired MARC tags, indicators, and subfields are loaded and indexed (if you download full records when ordering).
* Update [Foreign Currency Codes and Rates](http://csdirect.iii.com/Foreign%20Currency%20Codes%20and%20Rates) file.
* [Adjust encumbrances](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq_funds_adjust_forcurr.html) based on foreign currency exchange rates.
* Manage bounced email orders. (These orders will bounce to a library-designated fully-qualified email address.) See [Configure Outgoing Mail for Sierra](http://csdirect.iii.com/sierra/kb/article.php?cat_id=6&typ_id=2&art_id=34).
* Maintain [tickler rules](http://csdirect.iii.com/sierrahelp/Default.htm#sgil_maint_tickler_list.html).