Training

POLARIS ACQUISITIONS SETUP CHECKLIST

The following checklist is meant to be a guide to help you organize the Acquisitions setup of the Polaris System.

SETUP

- Make sure staff have the required permissions to perform Acquisitions functions, including the permission to modify funds if they over-expend or over-encumber funds. They may also need Cataloging permissions to do certain tasks.
- Set up Acquisitions-related Profiles and Parameters in Polaris Administration
- Set up supplier records in Acquisitions
- Set up fiscal years and funds in Acquisitions
- (Optional) Set up the purchase order templates in Acquisitions, as well as on-order bibliographic templates and on-order item templates (needed if creating items records on the release of PO).
- (Optional) Set up profiles with your suppliers to use their Web-based selection tools.
- Set up Import Profiles in Cataloging to import bibliographic records from your suppliers and create record sets. Polaris includes read-only import profiles specifically designed for acquisitions. These profiles cannot be changed, but they can be copied and renamed. The Acquisitions Bibs import profile is designed to retain 970 tags when the incoming records are rejected as duplicates, and the Enriched EDI Orders import profile is designed to update on-order items to shelf-ready items.