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 topics below are hyperlinks to the Sierra documentation (<http://documentation.iii.com/sierrahelp>) and other resources. Click on the link or right-click the text, select Copy Hyperlink and paste the URL directly into a browser.

A copy of the Sierra documentation is located on your own server and can be opened from within the Sierra staff application: **Admin | Manual**. Hyperlinked text can be used to search for topics in the local copy of the documentation.

This schedule is flexible and subject to change.

# Introduction

* Introduction of trainer and trainees
* [Using Acquisitions](https://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_overview.html)
* Discussion of current library procedures pertinent to acquisitions[[1]](#endnote-2)
* Library’s budget cycle requirements
	+ Fiscal year end date
	+ [Fiscal year closing](https://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_fisclose.html)

# [Record types created in acquisitions functions](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_create_recs.html)

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

# Funds

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

* [Creating fund records](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_create_recs_fund.html)
* [Grouping funds](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_edit_group_fund.html)

# Vendors

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

# Preparing for electronic ordering

* [Using Quick Click ordering](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_quickclick.html) (optional product) (discussion only)
* Acquisitions API (discussion only)
* [Electronic ordering overview](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_pos.html) (EDIFACT)
* [Preparing for electronic ordering](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_po_preparing.html) - Preparing vendor records for EDIFACT electronic ordering
	+ The vendor must provide an FTP address (IP or DNS) and username and password for access to their FTP server and allow a connection from the Sierra server through their firewall
	+ Mandatory vendor record fields for EDIFACT ordering:
		- **Vendor Code 3** fixed field must have a “**d**”
		- **Note 3** variable field must be present with $VENDSAN=<vendor SAN#>
		- **GIR** fixed field must have a code of 0,1,2,3 or 4

# Purchase order forms and claim forms

* [Sending electronic orders](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_po_elec.html) (EDIFACT) (discussion only)
* [Printing purchase orders](http://documentation.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://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_print_templates.html)
		- [Print templates](https://documentation.iii.com/downloads/ireport.php) (download Jaspersoft Studio third-party software)
		- [Customer wiki for print templates](https://documentation.iii.com/lswiki/PrintTemplates/WebHome)

# Encore/ WebPAC display

* [Record display options](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_record_display_options.html) [SHOWOREC](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_record_display_options.html) -- the Web Option which controls display of order records in WebPAC/Encore

# Acquisitions configuration files and tables

* [Claim cycle values table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_claim_cycles.html)
* [External funds codes table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_ext_fund.html)
* [Foreign currency codes and rates](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_forcur.html)
* [Inventory express table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_inv_express.html), optional product
* [Library SAN file](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_lib_san.html)
* [Multiselection groups table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_multiselection.html)
* [Outputting vouchers configuration options](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_vouchers_config.html), optional product
* [Receiving and billing locations table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_libaddr.html)
* [Use tax rates table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_usetax.html)
* [Value added table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_valueadded.html)
* [Vendor messages table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_vendor_msgs.html)
* [Web links table](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_sys_param_web_links.html)

# Acquisitions options in Admin Corner

* [Acquisitions Options](http://documentation.iii.com/sierrahelp/Default.htm#sadmin/sadmin_options_acq.html)

# Supporting documentation

* [Sierra WebHelp](http://documentation.iii.com/sierrahelp/Default.htm)
* [Innovative Developer Network](https://developer.iii.com/)
	+ [Getting Started](https://developer.iii.com/gettingstarted)
	+ [Acquisitions API Quick Start Guide](https://developer.iii.com/downloads/AcqQSG)

Please feel free to evaluate your training experience by filling out the Training Survey form at <https://innovative.libwizard.com/f/training-feedback>

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1. [↑](#endnote-ref-2)