Sierra Acquisitions

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 (<https://documentation.iii.com/sierrahelp/Default.htm>) and other resources. Click on the link to open on browser, 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
* [Logging into the Sierra Desktop Application](http://documentation.iii.com/sierrahelp/Default.htm#sdesktop/sdesktop_logging_in.html) or [Sierra Web](https://documentation.iii.com/sierrahelp/Default.php#sweb/sweb_accessing.html)

# [Record types](http://documentation.iii.com/sierrahelp/Default.htm#sril_records_types.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)
	+ [Fixed-length fields in vendor records](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_records_fixed_field_types_vendor.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)
	+ [Variable-length fields in vendor records](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_records_varfld_types_vendor.html)
* [Bibliographic record display](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_disp_bib.html) and [Order record display](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_disp_order.html)

# [Creating vendor records](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_create_recs_vendor.html)

* [Grouping vendors](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_edit_group_vend.html)
* [Preparing for electronic ordering](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_po_preparing.html)

# Maintaining Funds

* [Accounting units or serials check-in units](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_account_units.html) (optional product)
* [Creating fund records](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_create_recs_fund.html)

* [Changing appropriations, encumbrances, and expenditures in the fund adjustment table](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_funds_adjust_table.html)
* [Grouping funds](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_edit_group_fund.html)

[Creating bibliographic records](http://documentation.iii.com/sierrahelp/Default.htm#sgcat/sgcat_quick_create_bib.html)

* Transfer bibliographic records from a bibliographic utility
	+ [Transferring files in Data Exchange](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_data_exchange_upload_files.html) (Batch loading of record files)
* [Searching for records in a remote database](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_search_remote.html) (Z39.50 records download)

# [Creating order records](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_create_recs_order.html)

* Using the Acquisitions API (optional) (discussion)
* [Using Quick Click ordering](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_quickclick.html) (optional product)
* [Creating blanket purchase orders](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_blanket_po.html)
* [Entering orders in foreign currency](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_key_forcur.html)
* [Creating single-copy multi-fund orders](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_multi_copy.html)

* [Processing recommendations](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_recommendations.html) (optional)
	+ [Additional items to acquire](http://documentation.iii.com/sierrahelp/Default.htm#sgwpac/sgwpac_additional_item.html) option in WebPAC configuration
* [Using Selection Lists](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_select.html) (optional)
* [Ordering using Inventory Express](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_inventory_express.html) (optional product)

# Sending orders to vendors

* [Electronic ordering overview](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_send_pos.html) (optional)
* [Queuing purchase orders](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_queue_pos.html)

* [Printing purchase orders](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_print_pos.html)
* [Placing orders for Selection List titles](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_select_add_orders.html), optional

# [Maintaining records](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_records.html) (order and other record types)

* [Editing records in Sierra](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_edit_records.html)

* [Special considerations for editing order records](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgil/sgil_maint_sp_orders.html)
* [Transferring attached records](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_transfer_recs.html)

* [Adding messages to order records](https://documentation.iii.com/sierrahelp/Default.php%22%20%5Cl%20%22sgacq/sgacq_order_messages.html)
* [Using email reminders in order records](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_use_tickler.html)
* [Copying records](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_copy_rec.html)
* [Processing EDIFACT status reports](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_order_ack.html) (discussion)
* [Deleting records](https://documentation.iii.com/sierrahelp/Default.php#sgil/sgil_maint_delete_records.html) (delete individual records)

# [Receiving acquisitions](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_receiv.html)

* [Receiving orders and creating items](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_receiv_create_items.html)
* Other receiving options
	+ [Combine receiving and invoice entry](https://documentation.iii.com/sierrahelp/Default.php#sadmin/sadmin_options_acq_combine_rece_inv.html)
	+ Enter Receive Date directly in order records, by catalog search or using the [Rapid Update](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_receiv_rapidup.html) function

# [Claiming and cancelling orders](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_claim.html)

* [Searching for claimable records](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_claim_search_claimable.html)
* [Cancelling orders upon notification](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_cancel.html) (from vendor)
* [Claiming or cancelling a specific order](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_claim_specific_order.html)

* [Printing claims and cancellations](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_claim_printing.html)
* [Suppressing bibliographic records during order cancellation](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_claim_suppress_bib.html)

# [Invoicing](http://documentation.iii.com/sierrahelp/Default.htm#sgacq_invoices.html)

* [Creating invoices](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_keying.html)
	+ [Entering invoices using blanket purchase orders](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_invoic_blanket_po.html)

* + [Suspending invoice processing](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_suspending.html)

* + [Entering invoices with use tax](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_use_tax.html)

* + [Entering invoices with GST or VAT](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_vat_gst.html)

* + [Making partial payments](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_partial_payments.html)
	+ [Entering a line item that has no order record](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_invoic_x_recs.html) (X records)
	+ [Entering a line item that is not prorated](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_invoic_y_recs.html) (Y records)
	+ [Credit memos](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_invoic_credit_memos.html)
* [[Electronic invoice and approval processing](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_searching.html)](http://csdirect.iii.com/sierrahelp/Default.htm#sgacq/sgacq_invoice_electronic.html)

* [Posting an invoice processing session](http://csdirect.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_posting.html)
* [Searching invoices](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_invoic_searching.html)

# WebPAC / Encore display

* Alternatives for displaying order data
	+ Web Option [SHOWOREC](https://documentation.iii.com/sierrahelp/Default.php#sril/sril_record_display_options.html) (Record display options)
	+ Default behavior ([Viewing order information](https://documentation.iii.com/sierrahelp/Default.php#sgwpac/sgwpac_order_display.html))
	+ Manual suppression
* Staff view in WebPAC ([My Account for staff](https://documentation.iii.com/sierrahelp/Default.php#sgwpac/sgwpac_my_account_staff.html))
* Suggest a purchase in the WebPAC ([Acquire form](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_acquire_web.html))

# Reports and statistics in Acquisitions

* [Creating lists](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_lists.html) (review files)
* [Viewing financial reports](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_funds.html)

* + [Printing financial reports for funds](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_funds_printing.html)

* + [Generating fund activity reports](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgacq/sgacq_funds_adjust_activityreport.html)
* [Vendor statistics](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_vendorstat.html)
* [Electronic invoice processing reports and logs](http://documentation.iii.com/sierrahelp/Default.htm#sril/sril_reports_elec_invoices.html)
* [Using Statistics](http://documentation.iii.com/sierrahelp/Default.htm#sgstat/sgstat_main_page.html)
	+ [Creating reports](http://documentation.iii.com/sierrahelp/Default.htm#sgstat/sgstat_creating_reports.html) (order record reports)

* [Collection Development reports](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgwr/sgwr_coll_dev_reports.html)

* [Age of Collection reports](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sgwr/sgwr_age_of_coll_reports.html)

* [High-demand holds reports](http://documentation.iii.com/sierrahelp/Default.htm%22%20%5Cl%20%22sril/sril_reports_highdemand_holds.html)

# Year-end closing procedures

* [Fiscal closing](http://documentation.iii.com/sierrahelp/Default.htm#sgacq/sgacq_fisclose.html)
* [Deleting fund records](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_delete_funds.html)
* [Delete records](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_delete_records_function.html) (batch deletion of records)
* [Changing the estimated price for serials](https://documentation.iii.com/sierrahelp/Default.php#sgacq/sgacq_funds_adjust_eprice.html) (optional)
* [Adjusting encumbrances based on foreign currency exchange rates](https://documentation.iii.com/sierrahelp/Default.php#sgacq/sgacq_funds_adjust_forcurr.html) (optional)

# Preparing to go live

* [Templates for new records](http://documentation.iii.com/sierrahelp/Default.htm#sgil/sgil_maint_templates_manage.html)
* Discussion of what to do to prepare for going live with acquisitions

# Supporting documentation

* [Sierra WebHelp](http://documentation.iii.com/sierrahelp/Default.htm) – Browse Tab
* [Sierra LibGuide](https://innovative.libguides.com/sierra/welcome)
	+ [Acquisitions checklist](https://iii365.sharepoint.com/%3Aw%3A/s/ITLCresources/EXnr09JBhd5Cu3zXTSUqOKABw5dZ3E6Lt5GNl5vqHeWusg?e=LRTEFH)

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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