

ELOQUENT SYSTEMS INC

Eloquent Librarian™ Planning Guide

Volume EL5 – Acquisitions & Budgeting



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This manual is designed to guide you in planning the implementation of the Eloquent Librarian software as well as when you are ready to use the additional features at a later date. This volume of the Planning Guide prepares you for performing major functions with the Acquisitions Module.

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Introduction to the Guide

Who should read this guide?

The Planning Guide is for anyone preparing to use the Eloquent Librarian software. It provides a good overview of the system. With that knowledge you know what menu items to use for any function. You can then rely on the online HELP for each item on your menu and for every entry prompt on all the web forms.

When should it be read?

The entire volume should be read prior to implementing the software or getting any training from Eloquent. Your request for training can be more specific. You understand the options available and can plan for custom tailoring to better fit the workflow in your organization.

You should read specific sections again after a few months of operation – when you are ready to start implementing features that were not essential at the start. Any new employee should read the relevant volumes and sections prior to being trained.

Where else can I get help?

You also can take advantage of the following support provided by Eloquent Systems:

- [Tutorials](#) available on the Eloquent Website,
- You may log in as a [Read-only User](#) to access all the same menu items, but with the safety of not having the ability to add/modify any data.
- Just-in-time [remote training](#) for coaching on each new component as soon as you are ready to use it, and
- [Hotline support](#) after the system is installed and in operation.
- A few hours of [Professional Services](#) are free for the implementation and training for each new application or module. Additional hours may be purchased for data migration or for extensive custom tailoring.

What volumes are specific to the Eloquent Librarian application?

1. Volume EL1 - Public Access
2. Volume EL2 - Cataloging and Digital Content
3. Volume EL3 - Circulation, Advance Booking, Inventory & Fines
4. Volume EL4 - Serials Management, Issues & Article Cataloging
5. Volume EL5 - Acquisitions & Budgeting

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What volumes apply to all WebSuite applications?

1. Volume WS1 - Administrator Functions
2. Volume WS2 - Managing Authority Files
3. Volume WS3 - Structuring Data for Output
4. Volume WS4 - Pointers, Hierarchies & Hyperlinks

What is this volume about?

This volume covers the Acquisitions Module, which manages the requisition, ordering, processing and budgeting of new library resources.

Getting Started

How do I get an overview of all menu items for the Acquisitions Module?

You can log in as the user **Acquisitions Read-only** user (no password required) to get a feel for the acquisition functions without damaging the live database. From the menu window, you can click on the **Help** button to read help for each menu item. You can also get a printout of the help for all menu items. Here is a screenshot of the menu items for the Acquisitions Module.

Acquisitions menu

Setup

[Enter/edit supplier](#)

[Enter/edit currency rates](#)

Purchase orders

[Order one title for many people](#)

[Order many titles for one person](#)

[Process purchase orders](#)

[Process received orders](#)

[Modify back orders](#)

[Search line items](#)

[Search orders](#)

Budget

[Allocate budget amount](#)

[Budget summary report inquiry](#)

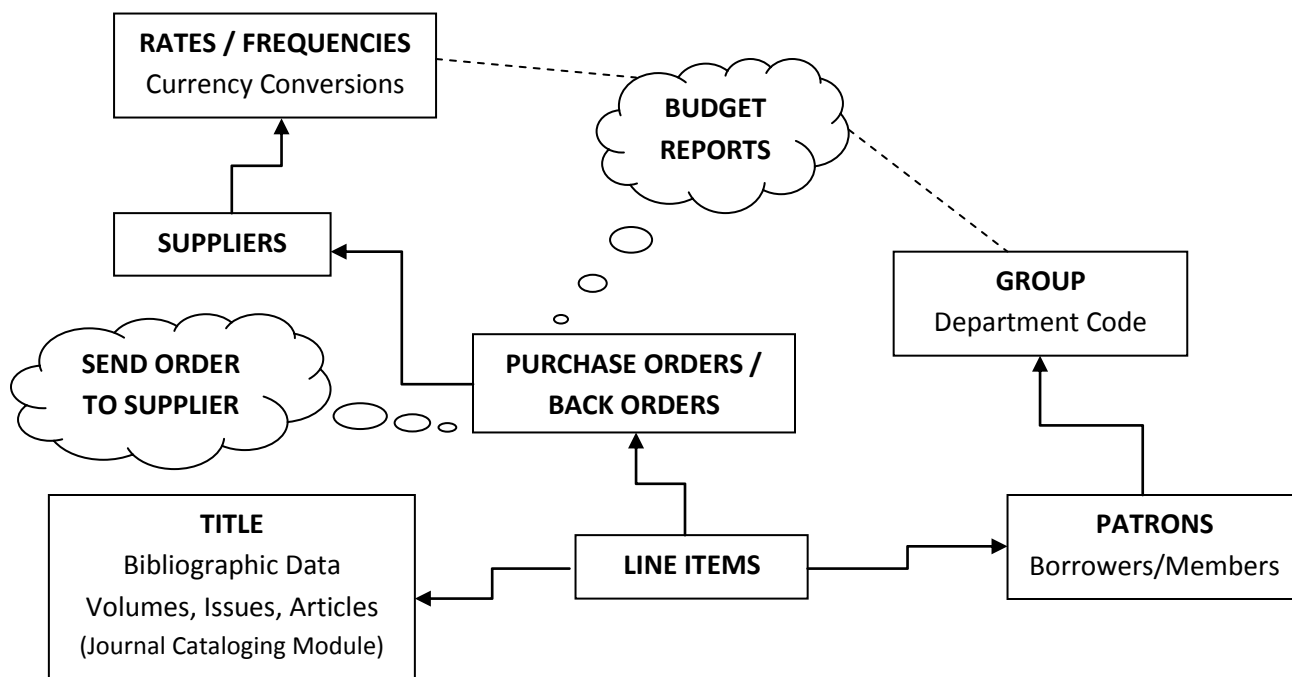
[Budget detail report inquiry](#)

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What tables/files are used for this module?

The following diagram illustrates the files involved and the relationship between the data in them.



How do I enter all of my suppliers?

Go to **Acquisitions menu -> Setup -> Enter/edit supplier**. This is the easiest way to enter all of your current suppliers. However, you can enter a new one on-the-fly as you are adding preparing a new order.

How will costs be allocated to the departments?

Every line item on an order is linked to an individual that, in turn, is linked to a department. This associates the cost with the department.

To prepare the table of departments, log in as Administrator, go to **Maintenance -> Support items -> Enter/edit library support (batch)** and select *Group* as the *Table name*. Then go to **Acquisitions menu -> Budget -> Allocate budget amount** to specify the budget amounts for each department.

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Can individuals requisition items?

Contact Eloquent for details about adding a Requisitions Module to the system. It gives you the ability to compile all the requests from your various clients and evaluate the budget figures prior to submitting the orders.

Does budgeting manage various currencies?

Yes. A conversion table is maintained by logging in as Administrator and going to **Maintenance - > Support items -> Enter/edit rate table data**. All currencies are based as a percentage off your local currency.

Is this module similar to the Serials Module?

Yes, it uses many of the same routines for budgeting and currency conversion. However, Acquisitions is for buying items as soon as they can be delivered. The Serials Module pays for subscriptions for issues of journals that will be published sometime in the future.

Preparing Purchase Orders

What are the steps for preparing and sending an order?

Go to **Acquisitions** menu -> **Purchase Orders** and use either **Order one title for many people** or **Order many titles for one person** depending on the situation. Click on **Create** next to *PO#/ Ref* to fill in the purchase order information, and then proceed to fill in line item information. Use the **Process purchase orders** menu item for sending. This gives you the opportunity to spend several days preparing and order and observing the total cost prior to sending it.

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What kind of information is entered for each order?

The following Web form is one option for entering line items for an order. It is convenient when many people are ordering copies of the same title. They all link to the same order. If it does not exist you use the **Create** button for the Web form shown on the next page.

The screenshot shows a web browser window titled "Order one title for many people - Windows Internet Explorer". The address bar shows the URL: <http://gencat8.eloquent-systems.com/webcat/request/DoMenuRequest?ClientSession=43c6679e:12b1a350a53:-7a938&Ln>. The browser menu includes File, Edit, View, Favorites, Tools, and Help.

The main content area features the Eloquent Librarian logo and the text "Website beta Librarian". The page title is "Order one title for many people". There are buttons for "Save", "Clear", "Back", "Menu", and "Help".

The form includes the following fields and buttons:

- PO #/ Ref * ?**: Input field with "Find", "Create", and "View" buttons.
- Title * ?**: Input field with "Find", "Create", and "View" buttons.
- Price * ?**: Input field.

Below these fields is a table for entering multiple line items:

	QTY * ?	Person * ?			
1	<input type="text"/>	<input type="text"/>	Find	Create	View
2	<input type="text"/>	<input type="text"/>	Find	Create	View
3	<input type="text"/>	<input type="text"/>	Find	Create	View
4	<input type="text"/>	<input type="text"/>	Find	Create	View
5	<input type="text"/>	<input type="text"/>	Find	Create	View

The browser status bar at the bottom shows "Done", "Internet", and a zoom level of "100%".

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Below is the Web form for entering the Purchase Order Information. The PO Reference is optional. If the field is empty a unique sequential number is created. The Fiscal year directs the costs into the appropriate budget.

Prepare purchase order

PO number ?

PO Reference (local) ?

Supplier * ?

PO date * ?

Fiscal year * ?

Comments - PO ?

<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Do it"/>
<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Do it"/>
<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Do it"/>

Comments - internal ?

<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Do it"/>
<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Do it"/>
<input type="text"/>	<input type="button" value="Edit"/>	<input type="button" value="Do it"/>

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The second option for entering line items is shown below. It is convenient when ordering many items for the same person. Both types of line item forms can link to the same Purchase Order. Each line in the order contains all the data in the spreadsheet plus that in the common area at the top of the form.

The screenshot shows a web browser window titled "Order many titles for one person - Windows Internet Explorer". The address bar shows the URL: <http://gencat8.eloquent-systems.com/webcat/request/DoMenuRequest?ClientSession=43c6679e:12b1a350a53:-7a8b&UniqueID>. The browser menu includes File, Edit, View, Favorites, Tools, and Help. The page content features the Eloquent Librarian logo and a navigation menu with "Back", "Menu", and "Help". The main form area is titled "Order many titles for one person" and contains "Save" and "Clear" buttons. Below this are search fields for "Person * ?" and "PO #/ Ref * ?", each with "Find", "Create", and "View" buttons. At the bottom, there is a table with 5 rows for entering line items. The table has columns for "Title * ?", "QTY * ?", and "Price * ?". Each row contains a text input field for the title, three buttons ("Find", "Create", "View"), and two empty input fields for quantity and price.

	Title * ?				QTY * ?	Price * ?
1	<input type="text"/>	Find	Create	View	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	Find	Create	View	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	Find	Create	View	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	Find	Create	View	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	Find	Create	View	<input type="text"/>	<input type="text"/>

What records are created in the database with each new order?

Each new order generates one record for each line item and another one for the order. Line items link to the order.

Do researchers see all the books on order?

Yes, unless you disapprove them for public.

Can a new title be entered ad-hock as I enter a new order?

Yes. Click on the **Create** button next to the *Title* prompt. This screen contains fewer fields than the normal cataloging screen; it has only the necessary fields for the order.

If I enter a skeletal record when placing an order what do I do later when I get the full MARC record? Can I update the skeletal record which already contains the order data?

The MARC import will match on the ISBN or LCCN to find and update the skeletal record, adding new data and replacing some of the old. You do not lose the acquisitions data related to the title.

Processing Purchase Orders

What happens when I process a purchase order?

There are two processes: the first will help you send the order and the second will flag the order as sent so that you do not accidentally sent it again.

Do I process all my orders at the same time?

It is up to you. On the *Process purchase orders* screen if you click on **Search** without entering search parameters, you will get a browse of all orders that have not been flagged as sent, where you can choose to tag the orders you wish to send. Or, you can limit your search by supplier or any other restriction you wish.

How do I send the order to the supplier?

You launch one of two **Go Processes** on the orders. One process is for sending an automatic email, the other is for creating a PDF that you can print and either mail or fax.

Receiving Orders

I do not always get everything I ordered. Can the system handle incomplete orders and back orders?

Yes, the system can automatically create a backorder record that is linked to the original purchase order record. The backorder will have a single line item for the outstanding quantity.

What are my options with back orders?

You can choose to send an order for the outstanding quantity, or you can cancel and pay only for the received quantity.

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How do things like taxes and shipping costs get distributed to departments?

When receiving you manually calculate the unit price taking into consideration discounts and shipping costs. The actual spent may not be exactly the same as the encumbered amount in the budget figures.

How does foreign currency affect my budget?

The budget figures are always in local currency. The orders and receipts are entered in foreign currency and converted into local currency based on the rates table for budget purposes.

What do I do with the physical items after I record their arrival?

You should contact the people who ordered the items if they are meant for personal use. If the physical items are meant for normal library circulation, you should prepare the copies as specified in Volume EL3.

Budgeting

When I place an order how does the system know which department to charge it to and what supplier to send the order to?

The order links to the supplier record for all relevant information such as email, currency, phone number and address. Each line item in the order links to a person who, in turn, links to a department for budget purposes.

Do orders not processed influence the budget reports?

Yes, prior to processing and sending an order you can check its influence on the budget.

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What kind of budget reports can I get?











Go to **Acquisitions** menu -> **Budget** -> **Budget summary report inquiry** for a breakdown by department:

Department	Expended	Committed	Total	Budget	Variance	% Spent
LIB - Library	\$185.70	\$643.03	\$828.73	\$10,000.00	\$9,171.27	8%
ADM - Administration	\$10.00	\$103.50	\$113.50	\$40,000.00	\$39,886.50	0%
TEC - Technical & Support	\$10.00	\$178.65	\$188.65	\$50.00	\$-138.65	377%
ACT - Accounting	\$0.00	\$20.00	\$20.00	\$10,000.00	\$9,980.00	0%
GOF - General Office	\$0.00	\$20.00	\$20.00	\$5,000.00	\$4,980.00	0%
HR - Human Resources	\$0.00	\$20.00	\$20.00	\$9,600.00	\$9,580.00	0%
MKT - Marketing	\$0.00	\$30.00	\$30.00	\$4,200.00	\$4,170.00	1%
MRM - Mail Room	\$0.00	\$0.00	\$0.00	\$8,000.00	\$8,000.00	0%
SAL - Sales	\$0.00	\$4.75	\$4.75	\$32,000.00	\$31,995.25	0%
	\$205.70	\$1,019.93	\$1,225.63	\$118,850.00		

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Go to **Acquisitions** menu -> **Budget** -> **Budget detail report inquiry** for a breakdown of a single department:

PO#/Date	Title	Person	Qty	Expended	Committed	Total
3/February 10, 2005	I should have seen it coming when the rabbit died /  Book	ADM - Blackson, Valerie	2	\$0.00	\$9.50	\$9.50
3/February 10, 2005	I should have seen it coming when the rabbit died /  Book	ADM - Brown, Hilary	4	\$0.00	\$19.00	\$19.00
2/February 13, 2005	Open minds to equality : a sourcebook of learning activities to promote race, sex, class, and age equity /  Book	ADM - Bigglesworth, Joan	1	\$0.00	\$15.00	\$15.00
5/February 16, 2005	Sometimes I Think I Hear My Name /  Book	ADM - Smith, Fred	2	\$10.00	\$0.00	\$10.00
8/February 16, 2005	4 minutes to the job you want : secrets of successful job hunting /  Book	ADM - Aksun, Angel	1	\$0.00	\$10.00	\$10.00
8/February 16, 2005	4 minutes to the job you want : secrets of successful job hunting /  Book	ADM - Bigglesworth, Joan	1	\$0.00	\$10.00	\$10.00
8/February 16, 2005	4 minutes to the job you want : secrets of successful job hunting /  Book	ADM - Blackson, Valerie	1	\$0.00	\$10.00	\$10.00
8/February 16, 2005	4 minutes to the job you want : secrets of successful job hunting /  Book	ADM - Brown, Hilary	1	\$0.00	\$10.00	\$10.00
8/February 16, 2005	4 minutes to the job you want : secrets of successful job hunting /  Book	ADM - Brown, Jasmine	1	\$0.00	\$10.00	\$10.00
8/February 16, 2005	4 minutes to the job you want : secrets of successful job hunting /  Book	ADM - Lee, Judy	1	\$0.00	\$10.00	\$10.00
				\$10.00	\$103.50	\$113.50

What is the difference between committed and expended?

Committed means that you placed the order, but have not received shipment. Expended is what you have processed as received. The actual payment may occur later by your accounts payable department. The conversion rate may change again by that time, so your numbers may not match exactly.

Can I bridge into the next budget year?

Yes, when preparing a purchase order, simply change the **Fiscal year** field, even if it is beyond the PO date.

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How and when do budget figures get entered?

Go to **Acquisitions menu -> Budget -> Allocate budget amount** to specify the budgets. You specify a budget for each department and fiscal year. You can enter the budget figures any time before running a budget report, but they are usually entered at the beginning of each fiscal year.

I buy with various currencies. What currency is my budget in and where is the conversion made?

Your budget is in your local currency. The conversion is made when you run the budget reports and is based on the rates table at that time. You use the currency supplied on the invoice from the supplier.