Koha: Acquisition Module

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Library Automation

- **Library automation** is used for housekeeping operations in the library.
- It incorporates all relevant technologies for collection, processing, storage, dissemination of all types of information in the library and information centre.
- According to Encyclopaedia of Library and Information Sciences “**Library Automation** is the use of automatic and semi-automatic data processing machines to perform such traditional Library activities as acquisitions, cataloguing, and circulation.
Integrated Library System (ILS)

- Integrated Library System (ILS)” or “Integrated Library Management System (ILMS)” refers to having all library functions in one system.
- Library Functions: Acquisitions, Cataloguing,, Circulation, Serial Control etc.
- Any ILMS has one relational database, one software system to interact with the database, two graphical user interface- one for user and other one for staff....(Wikipedia, 2016).
Features of ILMS

• ILMS must be able to handle many formats;
• provides many functions e.g. manipulating electronic data, searching the Internet and facilitating resource-sharing;
• It generally uses relational database management system (RDBMS) database as backend architecture;
• ILMS is portable between various platforms like windows/Linux etc.
• ILMS is GUI based system for smooth and easy functioning of the system;
• ILMS web-centric architecture and facilitate access to other servers over the internet as well as allowing multiple sources from one multimedia interface.
An Integrated Library Management System (ILMS)

An integrated LMS is an automated package of library services that performs several house-keeping operations. It has several modules:

- Administration
- Acquisition Module
- Cataloguing
- Circulation
- Serials
- OPAC
- Reports
- Tools
- Patrons
- Authorities
ACQ Work Flow

- Receiving Requisitions from Faculty, Students, researchers or staff;
- Checking Duplicate with existing Library Catalogue;
- Preparation of Final List based on requisition received after eliminating duplicates for approval;
- After Approval, preparation of Purchase Order and distribution to Registered Vendors;
- Receiving of Documents, Accessioning and Invoice Processing;
- Sending the signed bills to Account Section for the payment; and
- Finally, send books to technical section for technical processing.
KOHA

• Global System Preferences

• Acquisition Parameters

• Acquisition Modules
Global System Preferences

- Preference name: AcqCreateItem
- Preference value: followings
  - Create an item when placing an order (selected)
    (ask to enter item information at the time of items add to basket)
  - Create an Item when Receiving an Order
    (ask to enter item record information when you are receiving order)
  - Create an Item when Cataloguing the Record
    (item information will not be create at all in Acquisition, you need to go the cataloguing module to add items)
Global System Preferences

- Preference name: AcqEnableFiles
- Preference value: followings
  - Do: It allow attachment (selected)
  - Don’t: It doesn’t allow attachment

- Preference name: AcqView Baskets
(Tells whose basket you can see)

- Preference Value
  - Created by Staff members: you can see the basket only (selected)
  - Member Library: can see basket created by anyone
Acquisition Workflow

- Create Budget for any Financial Year 2018-2019;
- Allocate fund [may be department-wise; item type wise]
- Creating Suggestions/receiving requisitions
- Add Vendor + Create Basket + Add to Basket
- Ordering + Receive Shipment
- Receiving Items
- Invoicing
- Preparing Report
Koha Administration

- **Acquisition parameters**
  - Currencies and exchange rates
  - Budgets [Lump-sum amount]
  - Funds [allocation of amount]
  - EDI accounts [not mandatory] for vendor
  - Library EANs [not mandatory] for library
- **Step-1: Currency Setting**
  Home>Administration> Acquisition Parameters> Currency Setting> Add whichever currency you want to add> Set Active Currency by specifying unit one in currency.

- **Step-2: Budget**
  Home>Administration> Acquisition Parameters> Budget>New Budget> Enter details [starting date, ending date, amount]

- **Step-3: Fund Allocation**
  Home>Administration> Acquisition Parameters> Add Fund [it may be category-wise or it may be department-wise]
Budget and Fund

- **Base-level allocated** is the “Amount” value you defined when creating the fund.
- **Base-level ordered** is the ordered amount for this fund (without child funds).
- **Total ordered** is the base-level ordered for this fund and all its child funds.
- **Base-level spent** is the spent amount for this fund (without child funds).
- **Total spent** is the base-level spent for this fund and all its child funds.
EAN

- EAN= European Article Number. It is used in place of ISBN. 13-digit ISBN is directly equivalent to the 13-digit EAN. EAN is a standard describing a barcode and numbering system used in global trade to identify a specific retail product type.

- A library EAN is the identifier that the vendor gives to the library to send back to them so they know which account to use when billing. One EDI account can have multiple EANs.

- UPC (Universal Product Code) contains 12 digits whereas EAN has 13-digits.
Electronic Data Interchange (EDI)

- Electronic Data Interchange (EDI) is the computer-to-computer exchange of business documents in a standard electronic format between business partners.
- Communication takes place by standardized message formatting, without the need for human intervention;

**EDI Accounts**

Home>Administration>Acquisition Parameters>EDI Accounts> Manage vendor EDI accounts for import/export.

Step-4: Vendor Management

Home>Acquisition> Vendor Management>
Create New Vendor list with their description and mention discount rate.

Add Vendor

- Company Details: Name
- Contact: Email & Acq or Serial
- Ordering Information: discount rate

Add to Basket

- From Suggestions>click
- Click +Order>get New Order Form
- Type: Add Quantity, Select Fund and Item
  Type and Save. And close Basket>Print order
Step-5: Managing Suggestions

Home > Acquisition > From Suggestion / New Suggestion. User can send suggestions through OPAC.

- Suggestions by staff client;
- Patron may also make suggestion through OPAC;
- When suggestions are pending for Library’s review, it will appear in the Acquisition’s home page under tab ‘Pending suggestion’;
Step-6: Ordering

Home>Acquisition> Before placing order you must search for vendor

a) Create Basket> Add to Basket (item/book title) from approved suggestion (if not approved, go suggestion and approve it)>

b) Click on +Order from the list of suggestions>

c) So. You will get “New Order”. In this form, it is mandatory to specify the no. of copies and fund type under Accounting Detail. Default copies will be zero. Copies can be added by clicking on Add or Add Multiple Items. Unit Price to be mentioned;

d) Save and Close the basket e) Print order
Create a Basket Group

In some libraries, you have several staff members that create baskets, and, at the end of a period of time, someone then groups them together to send to the vendor in bulk.
Printing Basket

When you have finished adding items to your basket, click ‘Close this Basket’;

You will be asked if you want to create a purchase order at this time;

Your completed order will be listed on the Basket Grouping page for printing or further modification.

Clicking ‘Print’ below your order will generate a PDF for printing, which will have all of your library information followed by the items

Order Process completed. Waiting for Shipment
Step-7: Receiving Shipment & Receiving items/ Books

Home>Acquisition>
- Search for Vendor>Select the vendor>Click on Basket;
- Now, Click on Receive Shipment> Enter Vendor Invoice No > Next> click the check box against title to receive and click on hyperlink to receive>Finish Receiving> Enter Billing date>Click on Close> Save>

Receiving Book: Home>Acquisition> Search for Basket> Receiving books
Step-8: Processing Invoicing

1. Acquisition > Search for Invoice > Enter the Invoice date > Click on Finish.
2. Close the Invoice
Late Orders

- Upon clicking on the link to 'Late Orders' from the Acquisitions page you will get a series of filter options on the left hand side;
- These filters will be applied only closed baskets
- Once you filter your orders to show your books a list of these items will be displayed.
Thank You