1 INTRODUCTION

The following instructions describe all basic procedures for acquiring monographs that can be performed in the COBISS3/Acquisitions module. Library material can be acquired in different ways: by purchase, exchange, as legal deposit or gifts, from old stock or own edition, on the basis of a subsidy or registration fee or membership in various organisations.

Other procedures within this module used to maintain data are described as well. You must perform some of these procedures before performing basic procedures, whereas with others this is not necessary although it makes work easier if you do.

Preconditions for performing procedures

Before starting to perform basic procedures you must:

- supplement the data on home library; when installing COBISS3 software, this data is transferred from the COLIB.SI database and stored in the database of home library and the database of partners

- enter suppliers, legal deposit providers, exchange partners, financiers and donors into the database of partners

- open funds, where records relating to payments, use and balance of financial means allocated for the purchase of library material, are kept

- set up counter starting values

Defining material

Material represents a part of the bibliographic record from the local database, where all bibliographic data is stored. You can perform acquisition procedures also for the material not yet recorded in the local database. If a record for the material exists in the local database, you do not have to enter the data on this material. Otherwise you can either download the record from the shared database to the local database, enter the bibliographic data yourself or download the data from the shared database or from other databases, accessible via the Internet. Acquisition document items and holdings data can be linked to another material (in the COBISS2 environment, holdings data is transferred to another bibliographic record).

Selecting the material to be purchased

Various resources are available to help a library decide which material to purchase: catalogues, publishers' programmes, book fairs, etc. The purchase of library material can also be suggested by members in the form of *requests*. A purchase request includes bibliographic data on the material and the data about

the supplier, copies, priority, price and requestor, all a part of the order item. First enter a request, which is then processed, i.e. approved or rejected, or it receives the status of a *desideratum*. After that prepare an **order** for the supplier.

Ordering material	There are different ***purchase order*** types: standard order, advance order, on approval and blanket order. Depending on the type of material, you can order: monographs, multi-volume monographs or monographic series items. You can order one or several titles. A prepared order is submitted and sent to the supplier. Data on the material ordered is added to the holdings data.
Order cancellation	You can cancel an order or an order item from the supplier. For this purpose, prepare an ***order cancellation***. A prepared order cancellation is submitted and sent to the supplier. On the basis of cancelled copies, holdings data will be deleted.
Prepaying ordered material	Before receiving the material, you can receive an advance payment invoice, pro-forma invoice, quotation or some other notification about the amount to be paid. On the basis of the document received, perform prepayment or ***advance payment*** to the supplier. After you have entered the data and closed the advance payment document, send it to the accounting department and enter the sending date. When the accounting department notifies you that the advance payment has been performed, enter the payment date. The data about advance payment will be added to the holdings data.
Receipt of ordered material	You usually receive ordered material together with a ***delivery note***. The material must be checked and the delivery note entered. When closing the delivery note, the receipt data is added to the holdings data.
Paying for the material received	You may receive the ***invoice*** for the material received together with the delivery note and the material, or later. Enter the data about invoice and close the invoice. After that you send the invoice to the accounting department and enter the sending date. When the accounting department notifies you that the invoice has been paid, enter the payment date; after that the data about the invoice will be added to the holdings data.
	With the material purchase procedure, you can also record the purchase and receipt of the material, which will be sent for exchange to another library.
Receipt of exchange material	Receipt of exchange material is recorded in a ***list of material received by exchange***. You can prepare a claim for this material. When closing a list of material received by exchange, the receipt data is added to holdings data. If you wish, you can prepare a special order for the material that you wish to receive on the basis of exchange. You can send a letter of thanks to the library for the material received.
Sending material for exchange	After concluding the acquiring procedure for the material that will be sent for exchange to another library, prepare an ***exchange-based order received***. This order comprises the material desired that you receive from your exchange partner. In addition to that, prepare a ***shipment of exchange material*** and a ***list***, which accompanies the shipment. Afterwards send the material together with a list to another library.
Depository library – receiving legal deposit material	Receipt of legal deposit material is recorded in a ***list of legal deposit material***. You can prepare a claim for this material. When closing a list of legal deposit material, the receipt data is added to the holdings data.

The national depository library – receiving and sending legal deposit material	Record the receipt of legal deposit material in a *list of legal deposit material*. If you wish to collect unreceived legal deposit material from a legal deposit provider, who is liable to send the material to the national depository library, prepare a claim. When closing a list of legal deposit material, the data on the receipt of copies intended for the home library will be added to the holdings data. At the same time, *shipments of legal deposit material* and *lists* that accompany the shipments are prepared for other depository libraries. Afterwards send the material together with the list prepared in this way to other depository libraries.
Receiving gifts	Receipt of gifts is recorded in a *gift list*. When closing a gift list, the receipt data is added to the holdings data. You can send a letter of thanks to the donor for the donated material.
Other types of receipt	You can acquire material from the old stock, own edition, on the basis of a subsidy, registration fee or membership in various organisations. If you receive material in one of these ways, record the receipt in a *list of other receipts*. You can prepare a claim for the material received. When closing a list of other receipts, the receipt data is added to the holdings data.
Claiming	You can prepare a claim for:

- undelivered material, i.e. the material that has not been delivered within the expected delivery time

- damaged received material or material that does not match the order or delivery note or list of material received; this applies also to legal deposit material if a legal deposit provider does not send legal deposit material, does not send it in time, or does not send the required number of copies

- a request for advance payment; you can prepare a claim either for the request as a whole or for individual document item(s)

- an invoice received; you can prepare a claim either for the invoice as a whole or for individual invoice item(s)

	In concern to all claim types, you must first prepare a *claim*. After that you can submit it and send it to the supplier.
Overview of events	*Events* are recorded from the start to the end of each material acquiring procedure. The details of acquiring material concerned are found in the list of events.
Links to other modules and bibliographic databases	The COBISS3/Acquisitions module is linked to the following modules: COBISS3/Serials, COBISS3/Holdings, COBISS3/Loan or COBISS2/Loan, COBISS3/Reports and COBISS3/Application Administration.
	In the COBISS3/Acquisitions module, bibliographic data from the local database, shared bibliographic database or other databases, accessible via the Internet (Z39.50 protocol) can be used.