Discover how to configure a set of reference data in OLIB Acquisitions.

Overview

An accounts structure must first exist if you want to manage your commitments and expenditure in acquisitions. See Funds management for information about creating an accounts structure. You should also allocate money to the account instances through a transaction and remember to set the account instance to Active before attempting to create orders.

A set of reference data is created in advance for Acquisitions. When orders and order items are placed, these reference data values will then be available for regular use. See Acquisitions reference data and Supplier reference data for more information.

Default values

In addition, many default values for this reference data can be configured in advance. This makes the ongoing operation of the ordering process much quicker. As soon as the acquisitions librarian begins placing order/order items, the default values appear straight away.

Example set up of Acquisitions

1. If you are using Funds, enter Accounts, Financial Periods, and Account Instances and define your operating Currency in Admin Client Defaults. You may also wish to apply Permissions so that you limit the users who can commit and spend on goods.

   If you are not using Funds, set OLIB Defaults: Funds/Acq./Serials: Fund Accounting In Operation? to No.

2. (Optional) Plan out where you would like to set default values using the table in Default Reference Data Values.

3. Enter the required reference data described in Acquisitions reference data and Supplier reference data.

4. (Optional) Set up default reference data values in OLIB Defaults, Locations, Publishers/Suppliers.

5. (Optional) Configure automatic emailing of orders using the EDI protocol.

6. If you are using Funds, remember to allocate money to one or more Account instances in Funds and set the status of the account instance to Active prior to creating orders.

Additional fields in Acquisitions

The system manager can use Layout manager to add more fields to the Order Items domain.

Vendor Item Number - You can then search for order items placed using Order Items by Vendor Item Number.