



Sitka

Ending the Year With Acquisitions

Year End Checklist

- All pending purchase orders are activated.
 - Acquisitions --> Purchase Orders --> PO-Ordering Agency = Your Library --> PO-State = pending --> Search
- All items physically received in the current fiscal year are received in Evergreen.
- All items to be paid for in the current fiscal year are invoiced for in Evergreen.
 - Run report found in Sitka_templates --> Acquisitions --> Line Items --> Lines Items That Have Been Received but not Invoiced
 - Save and Close all open invoices.
- A date on which to run the year end processes has been chosen.
- Dates for an acquisitions year end freeze have been selected and staff are aware of what those dates are.

Year End Related Report Templates

Lines Items That Have Been Received but not Invoiced

- Sitka_templates --> Acquisitions --> Line Items

Line Items That Have Been Invoiced But Not Yet Received

- Sitka_templates --> Acquisitions --> Line Items

Fund Report by Year

- Sitka Templates --> Acquisitions --> Funds.
- This report is run three times:
 - Pre Year End for Old Fiscal Year
 - Post Year End for Old Fiscal Year
 - Post Year End for New Fiscal Year

Acquisitions Year End Procedure

<http://docs.sitka.bclibraries.ca/Acq/current/html/yearend-sitka-procedure.html>