

Evergreen 3.14 Acquisitions Update

New version live June 5, 2025



Interface changes

- General changes common to all 3.14
 - Colors – buttons, highlights, backgrounds, text
 - Button shapes
 - Tab theming
 - List elements, options, and menus
- MAJOR change to Acquisitions – Invoices rewrite
 - Invoice Summary
 - Invoice line items the same as Purchase Order line items
 - Navigation and Show & Filter Options like PO interface
 - New invoice tabs for views and actions



Functionality changes

- Different process for receiving items from the invoice
 - “Receive Items” button, receive List Mode and Receive Selected Copies replaced
 - All receiving is done using line-item actions
- Improvements for canceling line items
 - When all line items are canceled or received PO status updated to “Received”
 - NOTE: Pre-3.14 POs with canceled line items will remain “On-Order”

Test server available

<https://wls-test.sequoia.evergreencatalog.com/eg2/en-US/staff/login>

User your normal username and password

Clear your browser cache!

Log in to Evergreen, then open the browser settings and clear the cache. Return to the Evergreen home screen and proceed!

Invoice interface – 3.12

Open in New Window Refresh

Invoice
Lineitems: 2
Expected Cost: 43.26

Show Details 507212755

Invoice Search

Bibliographic Items

Title Details	# Invoiced / # Paid	Billed	Per Copy	Paid	Detach
The Alto Knights. , by (883929816354) 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$23.24, Encumbered \$23.24, Paid \$0.00 # 189373 DVD042325LL 5/6/25	1 / 1	23.24	23.24	23.24	Detach
Crimes of Fashion: Killer Clutch. , by (767685170465) 1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed Estimated \$11.24, Encumbered \$11.24, Paid \$0.00 # 189366 DVD042325LL 5/6/25	1 / 1	11.24	11.24	11.24	Detach

Direct Charges, Taxes, Fees, etc.

Charge Type	Fund	Title / Description	Billed	Paid	Delete
Processing Fee		Cataloging services	8.78	8.78	Delete

[Add Charge...](#)

Total	Total	Balance
43.26	43.26	0.00

Save Save & Clear Prorate Close

The entire Invoices interface has been re-written, changing the theming, colors, fonts, and navigation

Invoice interface – 3.14

Invoice #19943 (2039012060)

[New Invoice](#) [Close Invoice](#) [Save](#) [✕](#)

Vendor Invoice ID	<input type="text" value="2039012060"/>	Payment Method	<input type="text" value="(Unset)"/>	Saved Data Summary Total Billed: \$209.27 Total Encumbered: \$163.11 Total Paid: \$0.00 Balance Owed: \$0.00 Fund Summary
Provider	<input type="text" value="SCABTPRTCLS (SCA)"/>	Payment Auth	<input type="text" value="(Unset)"/>	
Shipper	<input type="text" value="SCABTPRTCLS (SCA)"/>	Note	<input type="text" value="Generated from acq.edi_message #14537"/>	
Receive Method	<input type="text" value="EDI"/>	Invoice Date	<input type="text" value="2025-04-23"/>	
Receiver	<input type="text" value="SCA"/>	Close Date	<input type="text" value=""/>	
Invoice Type	<input type="text" value="(Unset)"/>	Closed By	<input type="text" value=""/>	

[Invoice Line Items](#) [Batch Receive](#) [Search](#) [Print Preview](#)

[Actions -](#)

Line Items In Page All Line Items 0 Selected [Show Filter & Sort Options](#) [Expand All](#) [I<](#) [<](#) [>](#) [Rows 500](#)

	<input type="checkbox"/> Fodor's European Cruise Ports of Call : Top Cruise Ports in the Mediterranean, Aegean, and Northern Europe Fodor's Travel Guides (COR) 9781640977464 SCABTPRTCLS # Invoiced: <input type="text" value="1"/> # Paid: <input type="text" value="1"/> Billed: <input type="text" value="14.99"/> Paid: <input type="text" value="14.99"/> Detach On-Order Price Per Item: \$14.99 1 Items 0 Received 0 Invoiced 0 Canceled 0 Delayed \$14.99 Estimated \$14.99 Encumbered \$0.00 Paid # 180848 0 Expand Catalog Scarsdale Rev AD 910-919 2025-01-05 110875 Request(s) Invoice(s)
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Close, save, and new invoice buttons at top and bottom of screen.

Details form/section styling is now more like other interfaces

Invoice item display the same as PO line item display, including

- Paged navigation of invoice items
- Show filter and Sort Options

Receiving items workflow different

Receive Selected Line Items

Receiving all (or some) line items accessible from the main / Invoice Line Items Action menu.

Select all line items in page, all line items in entire invoice, or individual line items (if needed).

Invoice Line Items [Batch Receive](#) [Search](#) [Print Preview](#)

Actions ▾

- Export Single Attribute List for Selected Line Items
- Mark Selected Line Items as Received
- Un-Receive Selected Line Items
- Cancel Selected Line Items
- Apply Claim Policy to Selected Line Items

Show Filter & Sort Options [Expand All](#) [I<](#) [<](#) [>](#) [Rows 5 ▾](#)

ANIMALS EAT

Billed: Paid: [Detach](#)

1 Items | 0 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$16.58 Estimated | \$16.58 Encumbered | \$0.00 Paid
184719 | 0 | [Expand](#) | [Catalog](#) | [EG3525](#) | [Request\(s\)](#) | [Invoice\(s\)](#) | [Import Queue](#)

 **CHALK THE WALK**
Tometto, Chelsea 9781641709682 SCABROJ
Invoiced: # Paid: Billed: Paid: [Detach](#)
[On-Order](#) Price Per Item: \$15.74

Batch receive selected items

The screenshot shows a library system interface with the following elements:

- Navigation tabs: Invoice Line Items, Batch Receive, Search, Print Preview.
- Filtering options: Line Items In Page, All Line Items, 0 Selected, Show Filter & Sort Options.
- Action buttons: Receive Selected Line Items, Receive Selected Items.
- Item 1: SPY CAMP, Gibbs, Stuart, 1969- 9781442457546 SCABROJ, On-Order. Status: 1 Items | 0 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$7.87 Estimated | \$7.87 Encumbered | \$0.00 Paid. Receiving: 1.
- Item 2: CHARLIE THORNE AND THE ROYAL SOCIETY, Gibbs, Stuart, 1969- 9781665934909 SCABROJ, On-Order. Status: 3 Items | 1 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$17.97 Estimated | \$17.97 Encumbered | \$0.00 Paid. Receiving: 2.
- Table below:

<input type="checkbox"/>	Owning Branch	Shelving Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode
<input checked="" type="checkbox"/>	SCA	On Order (WEST)	Juvenile Fiction	SCA_JFIC (2024) (SCA)	Book	J GIBBS	ACQ19
<input type="checkbox"/>	SCA	On Order (WEST)	Juvenile Fiction	SCA_JFIC (2024) (SCA)	Book	J GIBBS	ACQ19

If you order several copies of a single title, the copies will all be grouped together in one line item. If all copies are shipped at the same time, they can be received as a group from the line item.

If they are NOT all shipped at the same time, all the individual copy records will be included in the invoice, BUT only the copies in the shipment should be marked as received.

This is done from the invoice, by clicking the “Batch Receive” tab, expanding the line item, and selecting the appropriate copies.

Direct Charges, Taxes, Fees, etc. [New Charge](#) | [Edit All](#) |

Charge Type	Fund	Title/Description	Author	Note	Billed	Paid	
Processi	SCA_HF	Misc / unspecif	Author...	6	329.64	329.64	Delete
Processing Fee		Misc / unspecified		6	\$107.10	\$107.10	Edit Delete

The fees and taxes data boxes are no longer highlighted yellow, indicating that the fields are blank and/or required.

Add funds for added charges

Click the Edit line next to a specific charge, or click Edit All to show all data boxes.

The Fund code MUST be added before the invoice can be saved or closed.

Save and/or Close Invoice

Once all items have been received and other charges updated, the Save and Close Invoice buttons are activated.

Once an invoice is saved, the Save button becomes inactive, and only the Close Invoice button is active.

Once an invoice is closed, the button label changes to Re-open Invoice.

The screenshot shows a library system interface for an invoice. At the top, there is a header for 'NATIONAL VELVET' with a book cover image. Below the header, the following information is displayed: 'Bagnold, Enid, 9780486838540 SCABROJ', '# Invoiced: 1 # Paid: 1', 'Billed: 19.21 Paid: 19.21', and a 'Detach' button. A 'Received' status is indicated with a 'Price Per Item: \$19.21'. A summary line shows '1 Items | 1 Received | 0 Invoiced | 0 Canceled | 0 Delayed | \$19.21 Estimated | \$19.21 Encumbered | \$0.00 Paid'. Below this, there are links for '# 183765 | 0 | Expand | Catalog | SR03252 | Request(s) | Invoice(s) | Import Queue'. The main section is titled 'Direct Charges, Taxes, Fees, etc.' and includes 'New Charge' and 'Edit All' buttons. A table lists charges with columns for 'Charge Type', 'Fund', 'Title/Description', 'Author', 'Note', 'Billed', 'Paid', and 'Delete'. Two rows are visible: the first row has 'Processi', 'SCA_HF', 'Misc / unspecif', 'Author...', '6', '329.64', '329.64', and 'Delete'; the second row has 'Processi', 'SCA_HF', 'Misc / unspecif', 'Author...', '6', '107.10', '107.10', and 'Delete'. At the bottom, there are buttons for 'New Invoice', 'Close Invoice', 'Prorate', and 'Save'.

Charge Type	Fund	Title/Description	Author	Note	Billed	Paid	
Processi	SCA_HF	Misc / unspecif	Author...	6	329.64	329.64	Delete
Processi	SCA_HF	Misc / unspecif	Author...	6	107.10	107.10	Delete