MnSCU/PALS to Aleph

Orders in Acquisitions

Monograph Orders, Standing Orders, Serial Orders

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Section 5 – Part 1

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Introduction

The Acquisitions module enables you to manage vendor, budget, order, and invoice records and runs under ADM type libraries exclusively (for example, ‘HRL50’).

Before you can create any orders, you must first make sure that:

1. A list of currencies has been created and the exchange rates defined using the Administration module

2. A list of budgets has been created using either the Acquisitions or Administration modules and includes the budget you want to debit.

3. A list of vendors has been created using either the Acquisitions or Administration modules and includes the vendor (and the vendor’s currency) you wish to order from

4. There is a bibliographic record in the system in which to attach an order record.
Acquisitions Process

ALEPH is a very flexible Library Management System, and does not impose strict restrictions on your workflow. The acquisitions process consists of the following steps (not necessarily in the order specified):

1. The creation of a bibliographic record in either the Cataloging module or the Acquisitions module (using the Fast Catalog Order form).

2. The completion of an Order Form in the Acquisitions module.

3. Dispatch of the order to the vendor.

4. Recording item information (if necessary).

5. Encumbrance of a budget.

6. Registration of the invoice (both General Invoice and Line Item).

7. Debiting of a budget. (optional) (Opportunity to change encumbered amount)

8. Registering the arrival of material.

9. Payment of the invoice.

10. Claiming.

The Bibliographic Record

To place an order on a title, we first need to have a bibliographic record against which we can place the order. The “Creating BIB Records in Acquisitions” session explained that process.

To place an order on a Bib record that has already been created, you can search the Staff Search Client and ‘push’ the record into Acquisitions or you can use the quick search features from within the Acquisitions client. If a BIB record has not yet been created, you may either use the Cataloging module to create the record and then ‘push’ the record to the Acquisitions client or use the Catalog Order form within the Acquisitions module to create a brief bibliographic record. In all cases the bibliographic record must ultimately be loaded into the Acquisitions Client.
Placing a Monograph Order on a Bibliographic Record

When a bibliographic record is loaded into the Acquisitions Client, the Navigation Window appears behind the Order List window. This Navigation Window is identical to the one seen in the Staff Search Client earlier. This Navigation Window can be used to push the record into other clients, if required, and also provides basic bibliographic information:

![Navigation Window](image)

Because there are currently no orders for this title, the Order List window is empty, but for every order that is placed, a new line will appear in the list. The following briefy describes each of the functional buttons of the Order List window:

- **Modify**
  - Click “Modify” to change the details of an existing order.

- **Add**
  - Click “Add” to add an order record to the Order List window. You will be prompted to choose the order type: monographs, serials, or standing orders.
Click “Duplicate” to add a new order by copying an existing order's details. A new Order Form will display for the new order and will include information copied from the highlighted order (template record). You can edit the content of the duplicate Order Form to make it appropriate for the new order.

Click “Delete” to delete an order from the Order List window. When deleting an order from the Order List window for orders of type M (Monographs), a warning for the existence of items may appear (If the there is a checkmark next to the Create Item Records field in the 3. Quantity and Price tab of the Order Form). Overriding this warning will delete all attached items with the deletion of the order itself. If there are any outstanding claims you will be prompted of this as well; overriding this warning will delete all attached claims.

A warning for deletion of the order's arrivals will appear when trying to delete an order with arrivals. Overriding this warning will delete all attached arrivals. A warning for deletion of attached invoices will appear when trying to delete an order with assigned invoices. Overriding this warning will delete all attached line items.

Click “Print/Cancel” to Print or Cancel an order. Clicking the “Print/Cancel” button evokes a dialog box from which you must choose how and where to send order output:

- Print record information only
- Print cancellation letter to vendor
- Send order letter to vendor

Click “Send” to print the order letter to be sent to the vendor or to send it by e-mail. The default letter format that will be printed or sent by e-mail is defined in the Vendor Information window. This letter format may be changed for a specific order by modifying the Order Form, in the Vendor Information window during order creation.

Click “Encumber” to encumber one or more budgets for an order.
Click “Invoice” to view the General Invoice form and Line Items related to this order or to create a new one.

Click “Arrival” to register the arrival of material. This can be done separately of invoicing or in tandem.

Click “Copies” to view an Item record or Subscription record (if it’s a serial). If such a record does not yet exist, you will be presented with a blank record for you to complete in anticipation of receiving the item or issue.

Click “Claims” to send a new claim or to view claims that have already been sent.

Click “Order Log” to read the list of order-related activities that have occurred (such as a change in the Order Status), or to add an entry to the list, click the “Order Log” button.

Click “Help” to receive context-sensitive help for the functional buttons of the Order List window.
Monograph Order

To create the order for this bibliographic record, click the button or use [Alt + A]. Clicking the “Add” button evokes the Order Type form appears:

There are three Order Types: Monograph, Serial and Standing Order. The following describes how the system defines each of the order types to help you decide which ordering format is appropriate for the order you are placing.

Monograph
A Monograph Order is for a single item, such as an individual book, or for a complete multi-volume work, such as a 20-volume encyclopedia. However, you may also place a Monograph Order for an individual issue of a serial publication, if, for example, the issue has been lost and you wish to replace it.

Standing Order
A Standing Order is usually for monographs in series (e.g., "Great Artists of the World") or for monographs of a particular subject matter. In either case, the order is usually for volumes that are due to be published in the future. A Standing Order is an open-ended order that remains in effect until it is cancelled. It is usually not known in advance the number of volumes that will be received nor the price of each volume.

Serial
A Serial Order is for a publication which is issued as a consecutively numbered and indefinitely continuing series. Examples include newspapers and journals. With a Serial Order, the number of issues to be received during the course of the subscription and the price of the subscription are both known in advance.

We will look at creating orders for serials and standing orders later, but for the moment we will select the Monograph type.
Once you have determined the type of order you will place, select the appropriate radio button in the **Order Type** window and click **OK**. The **Order Form** displays.

**Order Form**

The **Order Form** is divided into three tabbed windows (the Underlined tab name is the active tab). The following describes each of these tabs as well as their corresponding data fields.

Even though this is a new order we are creating, many of the fields are already populated automatically by the system. Some of these fields are system generated (i.e. **Order number 1** and the **Order status**) while other fields are previously-saved default values that have been subsequently inserted into all new records. Refer to the **Saving defaults** section of this document for more information about saving defaults.

**1. Order Information Tab**

![Order Information Tab Screenshot](image-url)
Regardless of which tab is active, you have access to the “OK”, “Save Def.”, “Refresh”, “Cancel”, and “Help” buttons:

**OK**

Click “OK” when you have completed the *Order Form*, this will save your order.

**Saving Defaults**

**Save Def.**

Click “Save Def.” if you wish to save the values you have entered in the fields of the *Order Form* and copy them to each new order form that you open. To delete these defaults go to the File menu and choose “Delete Order Defaults”.

When you create orders, much of the information that you enter is often entered for all or most of your orders. To prevent having continually to re-key information, the “Save Def.” button can be used to record certain information and automatically insert it into the *Order Form* when you create new order records.

To save this default information, simply fill in an Order form with all the data you wish to save as default, and then click on the “Save Def.” button. The next time you open an *Order Form*, this data will be inserted for you.

Defaults are saved per workstation and include the following fields:

- *Order number 2*
- *Order number 3*
- *Order group*
- *Order status*
- *Sublibrary*
- *Acquisition method*
- *Material type*
- *Vendor code*
- *Vendor reference*
- *Vendor note* (200 characters)
- *Rush*
- *Recommended by ID*
- *Action*
- *Approver ID*
- *No. of units*
- *Max. arrival days*
- *Batch claiming*
• **Item Collection (For Monograph orders)**
• **Encumber budget**

For the **Order Status**, **Item Collection** and **Encumber Budget** fields, an additional confirmation message will display if the fields are not empty when saving the defaults. These fields can be saved as defaults only in “New” or “Duplicate” records. All other fields can be saved in records that you can “Modify”.

When you click the “Save Def.” button, most of the vendor information (the specific fields are listed below) will not be copied when you “Add” or “Duplicate” a record. Instead, the information will be taken from the **Vendor Information** record. The following are the fields whose values are copied from the **Vendor Information** record:

• Letter type
• Order delivery type
• Delivery type
• Send letter by
• Currency
• Terms sign
• Terms percent

When the **Vendor Code** is inserted, it reads in the following values from the vendor record:

• Vendor name
• Order delivery type
• Letter type Send method
• Delivery type
• Currency
• Terms

Click “Refresh” if you wish to have the system calculate and display the local cost based on the effective currency exchange rates. Clicking “Refresh” also serves as a check routine for validating the data you have entered. If you have not entered all of the mandatory information and/or have entered data erroneously, an error message will display at the bottom of the **Order Form** in red:
Click “Cancel” if you wish to close out of the *Order Form* without saving your changes.

Click “Help” to receive context-sensitive help for each of the fields of the *Order Form*.

The following describes each of the fields of the **1. Order Information** tab:

*Order Number 1 (Mandatory)*: the system will automatically assign an order number based on the system’s order number counter, but you are free to change the number if you require.

*Order Number 2 (Optional)*: if you need to enter a supplementary order number, you may enter it here.

*Order Number 3 (Optional)*: an additional supplementary order number may be entered here.
Order Status (Mandatory): the following statuses are available:

NEW: the order has not yet been processed.

WP: waiting for processing. This is an interim status between NEW and PS, and orders with this status can be updated.

PS: processing started. This status can be used to indicate to the central ordering agency that the order is ready to be processed.

WB: waiting for budget confirmation.

QSV: query before sending order.

CNB: cancelled, no budget. This status cancels the budget commitment. If the status is changed to a status that indicates that the order can be sent (e.g. RSV), the budget commitment is re-activated.

DNB: delayed, no budget. This status cancels the budget commitment. If the status is changed to a status that indicates that the order can be sent (e.g. RSV), the budget commitment is re-activated.

RSV: ready to send to vendor.

SV: order sent to vendor. When an order slip is printed, the status is automatically updated to SV.

VC: vendor cancelled order. This status cancels the budget commitment. If the status is changed to a status that indicates that the order can be sent (e.g. RSV), the budget commitment is re-activated.

LC: library cancelled order. This status cancels the budget commitment. If the status is changed to a status that indicates that the order can be sent (e.g. RSV), the budget commitment is re-activated.

CLS: order is closed. If the material arrival status is complete and the invoice has been paid (payment status is Paid), the system updates the order status automatically to CLS.

Order ISBN/ISSN (Optional): if the bibliographic record has an ISBN in field 020, the number is inserted in here automatically when the button labelled “New” or “Duplicate” is clicked on the Order List. It can be overwritten if required. Ensure that no punctuation has entered this field accidentally from the MARC field.
Order Group (Optional): the library can use this field for assigning orders to a group according to the library's setup. There is no limit to the number of groups or names of groups. The group is included in Order Index and can be useful as a filter. We are using this field for the Priority Settings.

Open Date (Mandatory): this is the date that the order was initiated and is completed automatically by the system. It is not possible to overwrite this date.

Order Date (Mandatory): this is the date that the order was sent to the vendor, and is filled in automatically by the system. It is not possible to overwrite this date.

Status Date (Mandatory): this is the date that the status was last changed, and is completed automatically by the system. It is not possible to overwrite this date.

Invoice Status “Complete”: this field only appears when an Invoice Line Item for this order has been registered. If the invoice is complete (Invoice status is CMP-complete), then the checkbox is marked. If you expect to receive additional invoices for this order (Invoice status is PTL-partial), then the checkbox is left blank. Use this checkbox to change an existing invoice’s status.

Arrival Status “Complete”: this field only appears when an Arrival has been registered. If all units for this order have arrived (Arrival status is CMP-complete), then the checkbox is marked. If more units are expected (Arrival status is PTL-partial), then the checkbox is left blank. Use this checkbox to change an existing arrival’s status.

Material Type (Optional): select the material type of the item ordered. This field may be used for reporting purposes, but has no functionality within the system.

Sub-library (Mandatory): select the sub-library to which the order belongs.
**Acquisition Method (Mandatory):** select the method by which the item is acquired. This field has no functionality, other than for reporting purposes. The following methods are available:

- P  Purchase
- A  Approval
- G  Gift
- E  Exchange
- D  Deposit
- O  Other
- PF Purchase Free
- Q  Prepaid

**Recommended by ID (Optional):** if the order is for a specific initiator (e.g. bibliographer), you may enter their User ID here. You may select from a list of users by clicking on the expand arrow button to the right of the field.

**Recommended by:** if you have entered a user ID above, the system will automatically fill in the user name. It is not possible to overwrite this data unless you select a different user ID.

**Action:** this field is enabled only when the Recommended by ID has been entered.

Select the target action for this order:

- *None* - no special action

- *Send Directly* - choose this option if you want the order to be sent directly to the Recommended by ID. The system will print their address on the order slip. If there is an approver for the direct sending, enter its ID in the Approver ID field.

- *Create Hold* - choose this option if you want the order to be sent to the library’s address and you want to create a Hold Request for the item on behalf of the Recommended by ID. The pickup location information for the item is derived from the item record’s sub library information. If you wish to save the value you have entered for this field and copy it to each new order form that you open, click the “Save Def(aults)” button.

In the event that you delete the order, you will get a confirmation message asking if you are sure you want to delete the order. If you select “Yes”, another message will display, notifying you that it has an attached item record, still delete? If you select “Yes” a second time, it will delete the order and the item record as well as create a DELETE_HOLD_REQUEST Letter for the person who requested that it be ordered.
However, if you simply cancel the order (as opposed to fully deleting it from the system), the item record and its corresponding hold request will remain in the system. If another order is placed for that same bibliographic title, it will be able to satisfy the hold request that remained in the system from the cancelled order.

**Approver ID:** this field is enabled only when the Recommended by ID has been entered.

If there is an approver for ordering this order for the Recommended by ID enter its ID in this field. You may select from a list of borrowers by clicking the button to the right of the field. If you wish to save the value you have entered for Approver ID and copy it to each new order form that you open, click the “Save Defaults” button.

**Library Note (Optional):** you may enter a note of up to 200 characters. This note displays when receiving (arriving).
2. Vendor Tab

The following describes each of the fields of the 2. Vendor tab:

Vendor Code (Mandatory): you may select a vendor from a list by clicking on the button. Alternatively, you may enter a vendor code by simply typing it into the field. If you choose the latter option, ensure that you press the ["Enter"] key (with the cursor inside the Vendor code: field) when you are finished typing the vendor code. This will enable default Order delivery type, Delivery type and Letter type information to be taken from the Vendor record and inserted in the 2. Vendor tab of this Order Form.

Vendor Name (Mandatory): after you select a vendor code, the system will automatically fill in the vendor name. It is not possible to overwrite this data unless you select a different vendor code.

Vendor Reference (Optional): the vendor may have assigned a special reference number for the material in this order. This is especially likely for serials.
Vendor Note (Optional): you may enter a note of up to 200 characters in length.

Vendor Contact: You can choose a contact for the order from a drop-down list of the contacts for this vendor. System defaults to Contact #1.

Order Delivery Type (Mandatory): this is the way in which the order is sent to the vendor. By default, the system will automatically fill in the order delivery type that appears in the vendor record, although it can be overwritten. Valid Order delivery types are:

LI (List): this option enables all of the orders for a single vendor to be collated and dispatched to the vendor as a single communication.

LE (Single letter): selecting this option results in a single communication being produced for each order.

ED (EDI): if orders are to be sent via EDI, this option should be chosen. Please also refer to the "EDI" document for more information about configuring ALEPH for EDI ordering, receiving, and invoicing.

Letter Type (Mandatory) if displayed. This field is only displayed if Order delivery type ‘LE’ is selected. By default, the letter format is taken from the vendor record, but it can be overwritten if required. Up to 99 different formats for each language can be defined by the library.

Delivery Type (Mandatory): this is the method by which you wish the vendor to send the material to you. By default, the contents of the ‘Delivery 1 (ACQ)’ vendor record field is inserted here, but it can be overwritten with any of the values in the ‘Delivery 1-3 (ACQ)’ fields of the vendor record.

Send Method (Mandatory) if displayed. This field is only displayed if Order delivery type ‘LE’ is selected. By default, the letter send method is taken from the vendor record, but it can be overwritten if required. You can opt to print it and send it by conventional mail, or you may send it by email. In order to send the requisition by email, the ‘Letter type’ chosen above must be for a template that contains the "#EMAIL" command, and the email address must be given in the Vendor Addresses screen. A third Letter Send Method, by ‘FTP’, is not yet implemented.

Claim Date: the claim date refers to the estimated date of arrival of the material, and if left blank, is automatically calculated by the system when the order is sent to the vendor (i.e. when you click on the “Send” button in the Order List). This is based on the material delivery type chosen, and the corresponding ‘delay’ that was set in the vendor record.
System Librarian: the original claim date is permanently stored in the field Original-EDA, even if a new EDA is assigned at a later date. This original EDA has no functionality in the system, but may be useful for reporting purposes. It can also be seen in the View Order window.

Batch Claiming: if the Batch Claiming field has a check mark, this record will be included when claim letters are automatically printed via the Claim Report and Letters (b_acq_12) Services option (but only if the current date is later than the EDA). The report (which is separate from the letters) creates two printouts, one for orders that are set for Batch Claiming, and another for orders that are not.

Rush (Optional): if this is a rush order, put a mark in the box by clicking on it. When the order is printed, the order slip can be configured to mark this order as being urgent.

3. Quantity and Price Tab

![Order Form - Acquisitions Made Easy with ALEPH 500](image-url)
The following describes each of the fields of the **3. Quantity and Price** tab:

*Number of Units (Mandatory):* enter the number of units you wish to order. This will be printed on the order slip.

*Create Item Records:* if this box is checked, then the system will create an item record for each unit ordered when the record is saved. If you prefer, you can uncheck the box and create the item manually at a later stage. The ordered items will not appear in the Web OPAC or Staff Search Client, unless the items have been created. They will display in your catalog as “On Order”. This can be changed if the library does not want these to display in their public catalog.

If there are multi-parts on the order, it will be necessary for you to “modify” the item and enter the scope of the item in the description field. You would do this by clicking on “copies” from the Order List window.

*Unit Price (Optional):* enter the price per unit (using the same currency as specified in the Currency field on this form). If you enter a value in this field you can leave the ‘Total price’ and ‘List price’ fields blank, as the system will multiply it by the number of units to calculate the sums automatically when the record is saved (or the “Refresh” button clicked). If you do not complete this field, ensure that you enter a value in either the Total Price or the List Price fields.

*Total Price (Optional):* if the unit price was entered, the system will automatically calculate the total price by multiplying the number of units by the unit price automatically when the record is saved (or the ‘Refresh’ button clicked). If you prefer, you can leave the ‘Unit price’ blank and enter a value here (using the same currency as specified in the ‘Currency’ field), or you could leave both fields blank and enter a value in the ‘List price’ field.

*Quantity Note (Optional):* this note will be printed on the order slip to tell the vendor how many copies or volumes you want. Remember! An order can be for more than one copy. You may enter up to 200 characters.

*Currency (Mandatory):* select the currency in which you will be invoiced by the vendor. The first currency defined in the vendor record will be entered as the default, but it can be overwritten if required. Only currencies that have been assigned to the vendor in the vendor record can be used here, and only these currencies are displayed in the drop down list.

*List Price (Can be mandatory):* you may enter an estimate of the cost of the order here, so that an amount can be committed against the appropriate budget. The price entered should be in the vendor's currency. If you leave this field blank, the amount will be calculated automatically by the system by taking the value from the Total Price
field (this, in turn, may have been calculated by the system multiplying the number of units by the unit price).

Terms sign & Terms percent (Optional): the system will automatically enter the values that were set in the vendor record, but you may overwrite them. Enter a “+” or “-“ sign to indicate whether the percentage is a surcharge or a discount. These terms will relate only to the estimated price (the commitment). When the order is saved (or the button is clicked) the system will apply the terms to the List Price to calculate the Final Price.

Final price (Can be mandatory): when the order is saved (or the button is clicked) the system will automatically apply the terms to the List Price to calculate the Final Price. This field cannot be overwritten.

Local price (Can be mandatory): when the order is saved (or the button is clicked) the system will automatically calculate the Local Price by using the following algorithm (this field cannot be overwritten):

\[ \text{List price} \times \text{Terms} \times \text{Currency exchange rate} \]

Price Note (Optional): you may enter a note of up to 200 characters.

Encumber Budget (Optional): if you want to encumber this order to a single budget, you may enter the budget code here. To choose the budget from a list, click on the expand arrow button to the right of this field. Alternatively, you can encumber the budget at a later stage. If you want to encumber more than one budget, do not complete this field. Refer to the Encumbering the Order to a Budget section of this document for more information.

[System Librarian: the system checks that the order is correctly encumbered to a budget when the “Send” button is clicked on the Order List. If there is a problem with the encumbrance, the message below displays. Also, the order status changes to “DNB – Delayed No Budget”.]
Saving the Order

We recommended that you get into the practice of clicking the “Refresh” button before saving the order. This will display the same error messages as if the “OK” button were clicked, but it will also allow you to see the calculations applied by the system to the pricing before the record is saved and closed.

While clicking “OK” does save the Order Form to the system, it does not send it to the vendor nor does it encumber the budget (if one has been designated during order creation). Order records at this point in the ordering process are assigned the Process Status of “NEW”.

When you have completed the Order Form, click on the OK button to save the order. If there are any problems with the order, a red error message will appear at the bottom of the form (perhaps indicating needed data for a mandatory field), and you will need to correct the problem before you can save the record:
Encumbering a Budget

There are two methods of encumbering an order to a budget: via the **Order Form** during order creation and via the **Encumber** button in the **Order List** window after order creation. Among other benefits, this accommodates an ordering system in which the person who creates the order may not be the same person (or have the same permissions as the person) who assigns encumbrances for the order.

**Encumbering During Order Creation**

If you are encumbering an order to a single budget (i.e. you are not paying out of several budgets), you can enter the budget code in the **Encumber Budget** field of the **Order Form** at the time the order is created:
On the **Order Form**, you can either enter the budget code directly, or you can click the expand arrow button to the right of this field (see above) to display the **Budget List Filtered** form:
Remember, it is possible to see the current balance of a budget by clicking on the **Balance** button or use [Alt +B] from the *Budget List Filtered* form:
If you try to encumber against an inactive budget (with status \textit{NA}), you will not be able to save the record:

![Order Form - Abstract algebra](image)

Similar messages will be displayed if you try to over-encumber a budget (beyond the over-encumbrance level set) or encumber to a budget outside of the valid date range.

**Encumbering After Order Creation**

Once you have saved the order, you cannot use the \textit{Order Form} to encumber at a later date (when modifying) as the field is no longer available. In this situation, you will need to click on the \textit{Encumber} button from within the \textit{Order List} window. If you wish to encumber a single order to multiple budgets, you need to commit it via the “Encumber” button from the \textit{Order List} window. You can also use this method to commit to a single budget (although you may find the first method to be more efficient).
The *Encumbrances for Order* form displays when you click “Encumber”:

To add the first budget to the list, enter the budget code in the *Budget Code to Add*: field. Alternatively, you can click the expand arrow button to select the budget from the *Budget List Filtered by*... form. The default *Encumbrance* (value) field is identical to the *Estimated Cost of Order* (value) field.

You can overwrite the value in the *Encumbrance* field based on how much you wish to encumber to this particular budget or you can add a percentage in the *Encumbrance Percent*: field to automatically change the amount in the *Encumbrance* field.

In the example below, the insertion of “10” (%) in the *Encumbrance Percent*: field changes the amount in the *Encumbrance* field to “18.70”:
Click the [Add Budget] button or use [Alt + A] to encumber the first budget.

The value in the Encumbrance field now reflects the difference in the Estimated Cost of Order and the Total Encumbrance so far:
To encumber the remaining amount to another budget, enter the budget code in the *Budget Code to Add:* field, and click the “Add Budget” button.

You can continue to use percentages of the *remaining* amount(s) with 0 indicating 100%.

By using the example above to encumber the remaining amount of 168.30, you would get the following result:
Because the *Total Encumbrance* now matches the *Estimated Cost of the Order* (which was taken from the *Final Price* in the order record), the *Encumbrance* is now set to zero.

We could, however, encumber a value higher than our estimated cost of the order by simply adding another budget to the list and assigning it an encumbrance.

The *Enc/(Active Amt)* column displays the *Encumbrance Sum*, broken down into two parts:

1. Original *Encumbrance* Amount that is based on the *Estimated Price* on the *Order Form*.

2. Difference between the Original *Encumbrance* Amount and the amount on the *Invoice*. This difference is referred to as the *Active Amount*. The *Active Amount* displays as zero until the order is sent to the vendor. After the invoice is registered as “complete” the *Active Amount* automatically becomes zero.
When viewing the **Order List** window for this order, we are aware that this order (ORDER-35355-3) is encumbered to *multiple* budgets by the presence of an * (asterisk) in the **Budget** column of the **Order List** window:

![Order List window](image)

The system will not encumber the designated budgets *until* the order is **Sent to Vendor** (*order status ‘SV’*). If you are creating orders that do not actually need to be sent to the vendor, we recommend that you change the **Order Status** to ‘SV’ (manually) during order creation.

**Sending the Order to the Vendor**

When you click the **Send** button from the **Order List** window, one of the following actions may occur, depending on definitions set in various records of the system. Most all our vendors are set to an “LI” delivery type. Therefore, when you click the “send” button the status become RSV. When the batch service is run it will change to SV.

<table>
<thead>
<tr>
<th>Order delivery type (note 1)</th>
<th>## - EMAIL_ADDRESS (note 2)</th>
<th>Email address (note 3)</th>
<th>Send method (note 4)</th>
<th>Process (note 5)</th>
<th>Status change (note 6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>LE - Letter</td>
<td>Yes</td>
<td>Yes</td>
<td>Email</td>
<td>Direct</td>
<td>SV</td>
</tr>
<tr>
<td>LE - Letter</td>
<td>Yes</td>
<td>Yes</td>
<td>Print</td>
<td>Direct print</td>
<td>SV</td>
</tr>
<tr>
<td>LE – Letter</td>
<td>Yes</td>
<td>No</td>
<td>Any</td>
<td>Direct print</td>
<td>SV</td>
</tr>
<tr>
<td>LE – Letter</td>
<td>No</td>
<td>Yes or No</td>
<td>Any</td>
<td>Direct print</td>
<td>SV</td>
</tr>
<tr>
<td>LI – List</td>
<td>Inactive</td>
<td>Yes</td>
<td>Inactive</td>
<td>Services</td>
<td>RSV</td>
</tr>
<tr>
<td>LI – List</td>
<td>Inactive</td>
<td>No</td>
<td>Inactive</td>
<td>Services</td>
<td>RSV</td>
</tr>
<tr>
<td>LI – List</td>
<td>Inactive</td>
<td>Yes or No</td>
<td>Inactive</td>
<td>Services</td>
<td>RSV</td>
</tr>
<tr>
<td>ED - EDI</td>
<td>Inactive</td>
<td>Yes or No</td>
<td>Inactive</td>
<td>Services</td>
<td>RSV</td>
</tr>
</tbody>
</table>
Note 1: this is the Order Delivery Type as set in the 2. Vendor tab of the Order Form.

Note 2: this column states whether the letter format defined in the 2. Vendor tab of the Order Form includes the ## - EMAIL_ADDRESS command. Inactive means that the letter type field is not displayed for the specific Order Delivery Type.

Note 3: this column states whether the vendor record has an email address defined.

Note 4: this column states the method of dispatch chosen in the 2. Vendor tab of the Order Form. Inactive means that the Send Method field is not displayed for the specific Order Delivery Type.

Note 5: this column states the method that the order will be dispatched when the “Send” button is clicked within the Order List window.

Direct email: the order will be dispatched immediately from the client via email. [System Librarian: you can configure the [MAIL] section of the ALEPHCOM.INI file (usually found in C:\AL500\ALEPHCOM\TAB) in order to be able to send emails]. See System Training

Direct print: the order will be output directly to the client’s attached printer.

Services: the order will be stored on the server, ready for collation with other orders to this supplier. Printing or transmission is later activated via the Acquisitions Services function.

Note 6: this column specifies what status the order will be changed to when the “Send” button is clicked within the Order List window.

SV: Sent to vendor

RSV: Ready to send to vendor. Acquisitions Services functions will Only pick up and process orders with this status.
This status change can be confirmed by looking at the Status column of the Order List window:

![Order List window](image)

### Sending an Order with No Linked Budget
If you print an order that has no linked budget for the commitment, the system will change the order status to be **DNB (Delayed No Budget)**

### Printing/Canceling/Sending the Order
The **button** in the Order List window calls up the Print Type dialog box offering the following three choices:

![Print Type dialog box](image)

- **Print Record Information Only**
  - This prints out information relating to the order for internal purposes. You will be prompted for a filename before saving to a (local/remote) disk.
When a cancellation letter is sent to the vendor, the Order Status changes to LC (Library Cancelled).

For the cancellation letter, if the Order Delivery Type is anything other than LE (i.e. ED or LI), the system will ignore it and will choose 00 as the letter format and PRINT for the send method.

When an order letter is sent to the vendor, the order status changes to SV (Sent to Vendor) or RSV (Ready to Send to Vendor), the same as when the user clicks the “Send” button in the Order List window.

**Searching for an Order**

**Get Order Search**

Defaults to Order Number Search

You can retrieve an order directly by various index values (Order Number is the default index) by either clicking on the button, entering [Alt + O] from the keyboard, or by selecting Orders/Get Order from the Acquisitions Main Menu Toolbar. Keep in mind that this search is an “exact” single match search. If it cannot locate a single match record with the search, it will give you the “none” or “multi” reply.

The Get Order form displays:

The Index: field of the Get Order form is expandable which allows you to choose the index to search: (e.g. Order Number, Vendor Code, Budget, or Invoice). Once you have chosen an Index: to search, enter a search string or
starting point in the Index Text: filed and click “OK”. You may get any one of the following results:

None - A message "No matching entries. View index list?" displays:

If you choose "Yes", the Order Index List window displays with all filters cleared. The Index Type and the Starting Point fields are populated. The Exact Match checkbox is unchecked.

Single – A single match has been found. The Order List window and Navigation Window open.

Multi - A message "Multi matching entries. View index list?" Displays. If you choose "Yes", the Order Index List window opens with all filters cleared. The Index Type and the Starting Point fields are populated. The Exact Match checkbox is unchecked.

Click the OK button to bring up the Order List window and the Navigation Window for the Administrative record of this order. Please also refer to the Order Index section of this document for more information.

Searching through the Order Index List Window

If you do not know the exact Order Number, you can search for the order using the Order Index List window. The Order Index List window can be retrieved by either clicking on the , entering [Alt + I] from your keyboard, or selecting Orders/Index from the Acquisitions Main Menu Toolbar:

The Order Index List window displays:
No filters have been applied; therefore all orders in the index are listed. The following briefly describes the filtering fields (top pane) and the functional buttons (right) of the **Order Index List** window:

**Index:**

Click on the expand arrow to the right of this field to choose from a list of indexes from which to search: **Title, Author, ISBN, Order number, Vendor code, Additional Vendor code, Budget, Invoice, Invoice (invoice number + vendor code), Vendor reference, Recommended by ID, Recommended by, Order number 2, Arrival note, or Order group.**

**Enter Starting Point:**

Enter free-text into the **Enter Starting Point** field to search **Order Index List** window. You can jump to a particular point in the list by typing text in the space provided and pressing ["Enter"] or clicking the "Refresh Filter" button.

Click inside this box if you are looking for an **Exact Match.**
Click on the expand arrow to the right of this field to filter the **Order Index List** window by various library-defined **Sub-library(ies)**. You may use an asterisk (*) for truncation of a partial word (as a prefix or suffix).

Click on the expand arrow to the right of this field to filter the **Order Index List** window by various **Vendor Statuses**: Not active, Active, Active & EDI.

Click on the expand arrow to the right of this field to filter the **Order Index List** window by various **Order Statuses**: New, Waiting for Processing, Processing Started, Need budget confirmation, Query before sending, Cancelled – no budget, Delayed, no budget, Ready to send to vendor, Sent to vendor, Vendor cancelled, Library cancelled, or Order closed.

Click on the expand arrow to the right of this field to filter the **Order Index List** window by various **Arrival Statuses**: All statuses, None arrived, Partial Arrival, or Complete arrival.

Click on the expand arrow to the right of this field to filter the **Order Index List** window by various order groups.

Click on the expand arrow to the right of this field to filter the **Order Index List** window by various **Invoice Statuses**: All statuses, None Invoiced, Partial Invoice, Complete Invoice or Complete and Paid Invoice.

Click on the expand arrow to the right of this field to filter the **Order Index List** window by **Monograph, Serials, or Standing order**.

Click on the expand arrow to the right of this field to filter the **Order Index List** window by various **Rush statuses**: All Statuses, No Rush, or Rush.
Click on the expand arrow to the right of this field to filter the Order Index List window by a particular date; select the “From” Order Date:

Click on the expand arrow to the right of this field to filter the Order Index List window by a particular date; select the “To” Order Date:

Click “Select” to see the list of orders for the highlighted item, and to perform a number of different functions related to an order. This opens the Order List window (foreground) and the Navigation Window (background) for this order.

Click “View Order” to read, but not change order details for the highlighted entry.

Click “Order Log” to read the list of order-related activities that have occurred (such as a change in the Order Status), or to add an entry to the list for a specific order. Refer to the Order Log section of this document for more information.

Click “Print Order” to print detailed order information for the highlighted entry (using acq-m-order-info-00 form monograph or acq-s-order-info-00 for serial). Printing this form does not change the status of the order, but rather is for informational purposes only.

Click “refresh Filter” to jump to a particular point in the list by typing text in the space provided in the Enter a Starting Point field. Using the to choose from the list will automatically refresh the filter.

Click “Clear Filter” to clear any filters you have set and will refresh the Order Index List window.

Click “Cancel” to close out of the Order Index List window.
Click “Help” to receive context-sensitive help for the fields and buttons of the **Order Index List** window.

**New and Cancelled Order Index Window**

The **New and Cancelled Order Index** window allows you to search for orders whose status is *New*, *LC (library cancelled)*, *VC (vendor cancelled)*, and *CNB (cancelled, no budget)*, and allows you to delete order(s) if you are permitted to do so:

![New and Cancelled Order Index Window](image)

The following briefly describes the filtering fields (top pane) and the functional buttons (right) that are unique to the **New and Cancelled Order Index** window. Refer to the description of the **Order Index List** window above for an explanation of the “Select”, “View Order”, “Order Log”, “Print Order”, “Clear Filter”, “Cancel”, and “Help” buttons and the Order Type, Order Group “From” Order Date, and “To” Order Date filters.

Click on the expand arrow to the right of this field to filter the **New and Cancelled Order Index** by Material Types.
Click on the expand arrow to the right of this field to filter the **New and Cancelled Order Index** by various **Vendor Codes**. Clicking on the expand arrow opens up the **Vendor List** window.

Click “Search Now” to activate the search; the relevant entries will display. If you have typed text in a field (rather than choosing from a menu), then you must click the Search Now button in order to activate the filter. The relevant entries will then be displayed.

Click “Delete” to delete order(s) by highlighting them. For multi-select deletes, hold down the [“Ctrl”] and [“Shift”] keys on your keyboard.

For a single select delete use the same routine as you would for a standard delete. This means that you will be blocked if you lack permission to delete an order. If there are attached Items/Claims/Arrivals/Invoices, the system will ask you to re-confirm the deletion.

For multi select deletes, you will be notified once the operation is complete as to how many successful deletions were made.

If there was a **Hold Request** placed against the deleted order, the system will produce a **Delete Hold Request** letter.

Click “Delete All” to delete all the listed orders. The system will delete only orders that you are authorized to delete. You will be notified once the operation is complete as to how many successful deletions were made. In the event that there was only **one** entry listed and Items/Claims/Arrivals/Invoices were attached, the system will prompt you to re-confirm the deletion.
Order Log

The *Order Log* keeps track of various order-related activities that have occurred, such as a change in the *Order Status* or *Next Claim Date*. Highlight your order from within the *Order List* window and click the “Order Log” button, the *Logs of Order* window displays:

When an order record is moved from one ADM record to another (using the *Search Navigation Window*), all of its related order-log records are also moved and a new order-log record is created under the new ADM to indicate the action date and references the old *Order Number* and *ADM Number* the logs were taken from.

The following briefly describes the fields, buttons and panes of the *Logs of Order* window:

1. **Upper Pane**
   The Upper Pane of the *Logs of Order* window provides summary information about the contents of the *Order Log* and contains the following columns:

   - **Date/Time**
   - **Description**
   - **Details**
   - **User**
   - **Action date**

   ![Logs of Order Number 35355-1 window](image-url)
**Date/Time:** The date and time the log was entered (manually or automatically by the system).

**Description:** A brief description of the type of action taken

**Details:** A description of the specific details of that action taken

**User:** The login name of the user who performed the action

**Action Date:** The date that an action must be taken; for manually added entries to the log; Press "[F9]" to view/update the date format.

2. **Center Pane**

The Center Pane of the *Logs of Order* window allows you to filter the contents of the *Order Log*. To filter the *Order Log* check one or more of the boxes next to the desired log transactions and click the “Filter” button. To display all transactions select *All*.

[**System Librarian:** Default filters can be set in C:\AL500\ACQ\TAB\acq.ini under:

[General]
FilterLogger=01 02 04]

3. **Lower Pane**

The Lower Pane of the *Logs of Order* window allows you to create manual entries to the *Order Log* and includes the following fields which must be completed:

**Action Date:**

Select an *Action Date* from the calendar expand arrow for your entry.

**Transaction Type:**

Select a *Transaction Type* from the drop-down list that includes: *General Note, Subscription history note, Correspondence from the vendor,* and *Note to vendor.* There are three types that will never be automatically generated by the system:

*Transaction No. 00 - General Note* that will appear only in the *Order Log.*

*Transaction No. 98 - Response from Vendor,* allows you to manually assign response from the vendor (up to 2000 characters).

*Transaction No. 99 - Note to Vendor* (up to 2000 characters) that will be printed on the Order letter and Order List. This is in addition to the *Note to Vendor* (up to 200 characters) that may be entered on the *Order Form.*

**Log Text:**

Enter your log text here (up to 2000 characters). When you type an entry, you may create a line break at any time by pressing "[Ctrl] + ["Enter"].
4. Functional Buttons

**Remove A. Date**
Click “Remove A. Date” (Remove Action Date) to reset the action date to zero.

**Filter**
Click “Filter” once you have chosen one or more of the boxes next to the desired log transactions in the Center Pane of the Logs of Order window.

**Add**
Click “Add” if you wish to add an entry, choose the transaction type, enter the log text. In order to reset the action date to zero, click “Remove A. Date” (Remove Action Date).

**Close**
Click the “Close” button to close the Logs of Order window.

**Help**
Click the “Help” button to retrieve context-sensitive help on the fields, buttons and panes of the Logs of Order window.

A monograph order is closed when the record is completely arrived and completely invoiced.

Placing a Standing Order

A **Standing Order** is used for multi-part publications when the number of parts is unknown. Publications may be irregular. Normally the order remains open ended with the vendor until it is cancelled. Volumes are due to be published in the future. Often you do not know the number of volumes or price in advance.

In many cases a single Bibliographic record can manage the **Standing Order** (i.e. an annual yearbook without unique titles for each volume). If multiple bibliographic records are required to manage a single **Standing Order** you may create a special Bibliographic record to manage the order (i.e., a membership). Membership records are discussed later in this document.

Standing Order Creation

In order to place an order for a **Standing Order** you must first have a Bibliographic Record just as you do for Monograph Orders and Serial Orders. The following shows the “Nav Map” and “Order List” for a **Standing Order**.
Click on "Add" to choose the (Standing Order) Order Type:

The Standing Order Order Form displays. The fields in the Standing Order form are the same as the previously discussed Monograph Order form with the exception of Tab 2 – Vendor.

2. Vendor Tab (Standing Order)

When creating an order for the Order Type Standing Order (O), there are additional fields in the 2. Vendor tab to accommodate this order type:
The following describes the fields of the **2. Vendor** tab that are unique to Standing Orders.

**Max. Arrivals Days:** this is the maximum number of days that may elapse since you received the last volume. If you have not yet received any volumes, then this is the maximum number of days that may elapse since you sent the order to the vendor. Therefore, for an initial standing order you may choose 90 days. After the first piece arrives you would change it to perhaps 365 days. This field is used in the Claim Report for Standing Orders.

**Subscription Start:** enter the subscription period of the standing order. This can be left blank. If you enter a start date, an end date is required.

**Subscription End:** enter the subscription period of the standing order. This can be left blank. If you enter a start date an end date is required. You can set the date farther out, such as 2010.

**Budget Cycle:** this defines the cycle of annual budgets that will be encumbered for the subscription in the following way: If you enter "1", then each annual budget will be encumbered in turn, as the new budgets are opened. If you enter "2", then every other annual budget will be encumbered; enter "3" to encumber every third annual budget, and so on. For example, if the selected budget is BIOLOGY-2002 and the Budget Period is "2", then the BIOLOGY-2002 budget will be...
encumbered for the subscription, and the annual budget BIOLOGY-2003 will not be encumbered at all. The next budget that will be encumbered for the subscription is BIOLOGY-2004. This also affects whether the renewal date will be changed by one year or two, etc. when the Subscription Renewal Letters service is run.

Renewal Date: Can be left blank. Use as the date on which the subscription should be renewed or cancelled. Use if you need to contact the vendor each year to renew the title.

Items for Standing Orders

When placing a Standing Order Order Type, the option to Create Item Records automatically is not available on the Order Form.

If you want to have an item record created, you will need to do it manually. The reason you may want to create an item record at this point is to have it display in your OPAC as On Order.

To create a manual item record see Section 6 “Items in Acquisitions”

Memberships

The BIB Membership record should include the name of the organization, as well as the titles and system numbers of all titles covered by the membership plan. Other information could be added regarding each title in the respective fields ($$a or other sub-fields).

Make sure that the field (and sub-fields) chosen for the Membership title is defined for display in the Navigation Window. In the following example, MARC21 210$$a (Abbreviated title) has the word Membership, the 245$$a (Main title) contains the terms Membership package and the Name of the Organization with the 740$$a and $$b for the titles and system numbers titles received under the package:
The following figure illustrates the membership record in the **Navigation Window**:

**Creating Individual Serial Titles**

Individual BIB records would need to be created for each serial title received through this membership. **Subscription records** would need to be created in Serials in order to arrive the issues and claim missing issues. The **Order Number** of the Payment Membership Order should be entered into the **Order Number** field of each **Subscription Record**.

The system allows discrepancies between the **Vendor Code** entered in the order and the **Vendor Code** entered in the subscription record.
Creating a Membership Order

An order type ‘O’ (Standing order) needs to be created from the BIB membership record. Follow the explanation for Standing Orders explained earlier in this document. Under Order Group choose “Membership” when creating this Standing Order. This will be useful for retrieval of membership-type orders.

Placing a Serial Order

A Serial Order is for a publication which is issued as a consecutively numbered and indefinitely continuing series. Examples include newspapers and journals. With a Serial Order, the number of issues to be received during the course of the subscription and the price of the subscription are both known in advance.

Serial Order Creation

In order to place an order for a Serial Order you must have a Bibliographic Record just as you do for Monograph and Standing Orders.

The following shows the “Nav Map” and “Order List” for a Serial.
Click on “Add” to choose the (Serial) **Order Type**:

![Order Type](image)

Choose “Serial” and click “OK”.

The Serial **Order Form** displays.

The fields in the Serial Order Form are the same as discussed previously for Monograph orders with the exception of Tab 2- Vendor.

**TAB 2 - Vendor Tab (Serial Order)**
The following describes the fields of the **2. Vendor** tab that are unique to **Serials**.

**Vendor Reference**: *This field appears on all order types. However, for any EBSCO orders, the subscription id number should be entered in this field in order to do the electronic invoicing.*

**Subscription Start**: enter the subscription period of the serial order. This can be left blank. If you enter a start date, an end date is required.

**Subscription End**: enter the subscription period of the serial order. This can be left blank. If you enter a start date an end date is required. You can set the date farther out, such as 2010.

**Budget Cycle**: this defines the cycle of annual budgets that will be encumbered for the subscription in the following way: If you enter "1", then each annual budget will be encumbered in turn, as the new budgets are opened. If you enter "2", then every other annual budget will be encumbered; enter "3" to encumber every third annual budget, and so on. For example, if the selected budget is BIOLOGY-2002 and the Budget Period is "2", then the BIOLOGY-2002 budget will be encumbered for the subscription, and the annual budget BIOLOGY-2003 will not be encumbered at all. The next budget that will be encumbered for the subscription is BIOLOGY-2004. This also affects
whether the renewal date will be changed by one year or two, etc. when the Subscription Renewal Letters service is run.

Renewal Date: Can be left blank. Use as the date on which the subscription should be renewed or cancelled. Use if you need to contact the vendor each year to renew the title.

Items for Serial Orders

When placing a Serial Order Type, the option to create an Item Record automatically is not available on the Order Form.

You do not have to create an item, but if you do, you will need to manually create one by pushing the order to the Items Module. The reason you may want to create an item record at this point is to have it display in your OPAC as “On Order”. The item record should be deleted when the first issue arrives. Items/issues for serials are arrived and handled through the Serial Module.

Changing an Order Type

If you decide it would be better to change an order type of a title, i.e. from an “O” Standing Order to an “S” Serial Order, you will need to find the order record and close it. You can then set up a new order record using the Order Type that you wish to switch to.

Services/Reports and Batch Processes

Order Log Report (acq-22)
This service generates a report containing information about orders. It extracts information from the order log and places it in the output file together with additional information such as document titles and ISBN/ISSN.

Send List of Orders to a Vendor (acq-14)
This service produces a letter with a list of orders to send to a vendor.

Partially-Filled Monograph Orders (acq-02-02)
This service retrieves the record numbers of Acquisitions monograph orders that have not been received from the vendor or have only been partially filled by the vendor and writes them to an output file. To produce a report from this file, use the Print Acquisitions Records (acq-03) service.

Monograph Orders - Status "New" (acq-02-03)
This service retrieves the record numbers of monograph orders whose status is NEW, and writes them to an output file. To produce a report from this file, use the Print Acquisitions Records (acq-03) service.

**Order Status (acq-02-05)**
This service retrieves record numbers for orders with a given status and writes them to an output file. To produce a report from this file, use the Print Acquisitions Records (acq-03) service.

**Order Cancelled by Vendor (acq-02-06)**
This service retrieves record numbers for orders that have been cancelled by the vendor (order status VC) and writes them to an output file. To produce a report from this file, use the Print Acquisitions Records (acq-03) service.

**General Retrieval Form (acq-02-01)**
This service retrieves the record numbers of Acquisitions orders according to a number of different filters of your choice. An output file will be created that lists record numbers without the detailed information for each record. To produce a report from this file, use the Print Acquisitions Records (acq-03) service.

**Print Acquisitions Records (acq-03)**
This service saves in a file or prints out Acquisitions records that have been found using one of the services that retrieve Acquisitions record numbers.

**Subscription Renewal Letters (acq-23)**
This service sends a letter to a vendor that contains a list of serials subscriptions and/or standing orders to be renewed.

The service runs on orders of type S (serials) and/or type O (standing orders) with an order status of SV (sent to vendor) and checks each order's renewal date against the dates defined in the From/To Order Renewal Date fields.

If there is a match, the order is included in the letter and the order's Renewal Date field is updated in relation to the Budget Cycle field. However, if the system determines that this new renewal date is later than the date in the Subscription End field, then this specific order will not be renewed and therefore will also not be included in the renewal letter.

**Statistics by Dates - Material/Month (acq-25)**
This service produces an Acquisitions statistics reports for a specific range of dates with the following columns: Material Type, Month, Purchase Method (Purchase, Approval, Gift, etc.).
Closing a Standing Order

A Standing Order retains an Order Status of (SV) and (Ptl) for Invoice Status and Arrival Status until which time you manually “Close” the order. (See above Order List Window)
To close the standing order, select the order and click “Modify”. On TAB 1 change the order status field to **CLS, VC, or LC**. Check the Arrival Status “complete” box and the Invoice Status “complete” box.
On TAB 2 change the “Subscription End” date to show the date of cancellation or completion.

**Closing a Serial Order**

A Serial Order retains an Order Status of (SV) and (Ptl) for Invoice Status until which time you manually “Close” the order. (A serial order displays none for Arrival Status as you do not arrive through the order record, but you arrive through the serials module.)

You close a Serial Order the same way as you close a Standing Order except that there will be no Arrival Status “complete” box to check. You need to change the Order Status, check the Invoice Status “complete” box, and enter the appropriate Subscription End Date.
In addition, for a Serial Order, you need to change the “To Date” on TAB 1 of the Subscription Information Tab. You can click on the button from the Order List window of a serial order to get to the Subscription Information Form.