Standing Order Definition

- Standing orders are for monographs in a series or monographs dealing with a particular subject matter.
- They are usually for volumes planned to be published in the future.
- They are for open-ended orders that remain in effect until cancelled.
- The number of volumes to be received, and the price of each volume, is not normally known in advance.
Standing Order Definition

• Need to be arrived and invoiced in Acquisitions
• No subscription record for a standing order
• Items are created manually
• Claiming standing orders (acq-11)
Serial Order Definition

• A serial order is for publications issued as consecutively numbered and as an indefinitely continuing series. The number of issues to be received during the course of the subscription and the price of the subscription are both known in advance, although they might change during the course of a subscription period.

• Items automatically created through the 853/853X in the holding record
Serial Order Definition

- **Items** arrived through serials – no arriving in Acquisitions
- **Invoiced in Acquisitions**
- Usually have a subscription record
- Claiming of items handled through serials (serial-44)
- Use the acq-19 to claim a serial order until the first item is arrived, then use the serial-44
Standing Order vs Serial Order

Order type “O”
- Arrival in acquisitions
- Invoiced in acquisitions
- Items added manually

Order remains open in SV status until manually closed
Claimed with acq-11

Order type “S”
- No arrival in acquisitions
- Invoiced in acquisitions
- Items created with subscription record and 853/853X in holding record
- Items arrived in serials
- Order remains open in SV status until manually closed
- Claimed with acq-19
### Standing Order/Serial Order

#### Order List

<table>
<thead>
<tr>
<th>Order no.</th>
<th>Sub-lib</th>
<th>Status</th>
<th>Inv St</th>
<th>Arr St</th>
<th>Type</th>
<th>Budget</th>
<th>Local price</th>
<th>Euro</th>
</tr>
</thead>
<tbody>
<tr>
<td>198</td>
<td>LAW</td>
<td>SV</td>
<td>None</td>
<td>None</td>
<td>S</td>
<td>SA01148</td>
<td>20.00</td>
<td>5.46</td>
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<tr>
<td>51653</td>
<td>MED</td>
<td>SV</td>
<td>None</td>
<td>None</td>
<td>O</td>
<td>SA01148</td>
<td>20.00</td>
<td>15.63</td>
</tr>
<tr>
<td>51654</td>
<td>MED</td>
<td>SV</td>
<td>None</td>
<td>None</td>
<td>S</td>
<td>SA01148</td>
<td>20.00</td>
<td>15.63</td>
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<tr>
<td>51655</td>
<td>MED</td>
<td>SV</td>
<td>None</td>
<td>None</td>
<td>S</td>
<td>SA01148</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

- **Serial Orders** – “S”
- **Standing Orders** – “O”
Order Fields

- **Maximum Arrival Days** (only Standing Orders) - the maximum number of days that may elapse from the time the last volume was received, or the maximum number of days that may elapse from the time the order was sent to the vendor.

- **Subscription Start/End** (for Serials and Standing Orders) – the dates between which the library will be receiving the serial.
Order Fields

- **Claim Date** (Serials and Standing Orders)
- Estimated date of arrival
- **For Standing Orders**
  Order date plus max arrival days. Once first copy is received then the claim date is last arrival date plus max arrival days
- **For Serial Orders**
  Order date plus delivery delay in vendor record
Standing Order – Creation

• **Renewal Date** (for Serials and Standing Orders)
  - the date by which the subscription should be renewed or cancelled.

• **Budget cycle** (for Serials and Standing Orders)
  - the cycle of annual budgets that will be encumbered for the subscription.
Standing Order – Creation

- **Budget cycle**
  
  **Example:**
  - The encumbered budget is BIOLOGY-2009.
  - The budget Period is “2.”

  **Result:**
  - The next budget that will be encumbered for the subscription is BIOLOGY-2011 (after the Renew Order Encumbrances service is run acq-06-b).
Arriving Standing Orders

- **REMEmBR** - Arriving a standing order and creating item record(s) are two separate tasks

- Arriving and invoicing can be done together
Standing Orders - Arrivals

- To register arrival for Standing Orders, click the Arrival node in the Order List.
Standing Orders - Arrivals

• When the Add button on the Arrival List is clicked, the Arrival Form is activated.

• This enables the registration of a new arrival of unit/units or to modify the details of units that have already arrived.

• The Note field can be used to enter volume information or title information.

• By default the Auto Update Exp. Arrival Date is checked. This will automatically compute the next arrival date and claim date.
Arrival Form

Arrival Date/Note

Next arrival or claim date
Standing Orders - Arrivals

- **Standing Order Arrival Status**
- For standing and serial orders, the arrival status is always “non-complete.” It may be manually updated to “complete” using the Order Form.
Standing Orders/Serials - Invoice

- **Subs. From/To Date** (Serials and Standing Orders Line Items) Enter the subs. coverage period of the invoice. These fields are mandatory only when the Check Subs. Date Overlap field is checked.
Standing Orders/Serials - Invoice

- **Check Subs. Date Overlap Checkbox** – (for Serials and Standing Orders Line Items)
  - The coverage period is checked against other invoice line items of the same order to see if there is a date overlap according to the Subs. From/To Dates fields.
Standing Orders/Serials - Invoice

- **Invoice Status Incomplete**
  - For standing orders and serial orders, the invoice status is also always “non-complete.” It may be manually updated to “complete” using the Order Form.
Creating Item Records

- To add an item record to the existing standing order bib record, click on the "Items/Subscription" node from the order list.
- The Items List window will appear in the upper pane with the list of items currently on the bib record.
- Either "duplicate" or choose "new" to create a new item record.
Standing Orders - Claiming

- **Claim Report for Standing Orders - acq-11**
- Creates a report of standing orders for which volumes have not been received by the Claim Date on TAB 3 of the Order Form.
Standing Order/Serails – Renew Subscriptions

- **Serial orders and/or Standing Orders Renewal Date**
  - This is the date by which the subscription should be renewed or cancelled.
Standing Order/Serials – Renew Subscriptions

- **Renew subscriptions – acq-23**
  - Enables the sending of a letter to a vendor with a list of serials subscriptions and/or standing orders to be renewed.
  - It is run on Serial orders and/or Standing orders with an order status “SV” and checks their Renewal Date (the date by which the subscription should be renewed or cancelled) against the from-to date period defined in this batch.
Renew subscriptions – acq-23

- If there is a match between the time periods defined in the batch and order’s renewal date, the order is included in the letter and the order's "Renewal Date" is updated in relation to the "Budget Cycle" parameter.
- If the system determines that the new "Renewal Date" is later than the "Subscription end" date, this specific order is not included in the batch.
Closing Standing Orders

• 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.
How to Close a Standing Order

• Change order status to **CLS, VC, or LC**
• Check the Arrival Status “complete”
• Check the Invoice Status “complete”
• Change the Subscription End date to show date of cancellation or completion
Closing Standing Orders

- Order Numbers: 162
- Order Status: CLS
- Additional Order No.1: 
- Additional Order No.2:
- Order ISBN/ISSN: 
- Open Date: 10/13/04
- Order Date: 02/02/05
- Order Groups: 
- Material Format: 
- Material Type: BK
- Sublibrary: TST
- Acquisition Method: P
- Recommended by ID: 
- Recommended by: 
- Action: None
- Approver ID: 
- Library Notes: 
- Status Date: 02/02/05
- Invoice Status: "Complete"
- Arrival Status: "Complete"

Max. Arrival Days: 120
Subscription Start: 01/01/2005
Subscription End: 12/31/2008
Budget Cycle: 1
Renewal Date: 12/31/2008

Order Numbers: 162
Order Status: CLS
Additional Order No.1: 
Additional Order No.2:
Order ISBN/ISSN: 
Open Date: 10/13/04
Order Date: 02/02/05
Order Groups: 
Material Format: 
Material Type: BK
Sublibrary: TST
Acquisition Method: P
Recommended by ID: 
Recommended by: 
Action: None
Approver ID: 
Library Notes: 
Status Date: 02/02/05
Invoice Status: "Complete"
Arrival Status: "Complete"
Max. Arrival Days: 120
Subscription Start: 01/01/2005
Subscription End: 12/31/2008
Budget Cycle: 1
Renewal Date: 12/31/2008
Example Type A
Standing Order

- Cataloged bib record with items
- Received at least annually
- Want to be able to encumber funds
- Want to be able to track past year payments
- Want to claim missing volumes
- Want to create an item upon arrival
Example Type B
Standing Order

- Cataloged to individual bib records when they are received
- Basically a payment record needed
- Want to be able to encumber funds
- Want to be able to track past year payments
- Want to claim missing volumes
Closing Serial Orders

- A Serial Order retains an Order Status of (SV) and (Ptl) for Invoice Status and until which time you manually “Close” the order.
How to Close a Serial Order

• Change order status to CLS, VC, or LC
• Check the Invoice Status “complete”
• Change the Subscription End date to show date of cancellation or completion
• Change To Date in Subscription record to show date of cancellation or completion
# Closing Serial Orders

## Subscription Record

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sublibrary</td>
<td>TST</td>
</tr>
<tr>
<td>From Date</td>
<td>01/01/2005</td>
</tr>
<tr>
<td>To Date</td>
<td>12/31/2008</td>
</tr>
<tr>
<td>Item Status</td>
<td>03</td>
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<tr>
<td>Collection</td>
<td>MAIN</td>
</tr>
<tr>
<td>Call Number Type</td>
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<tr>
<td>Call Number</td>
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<td>2nd Call Number Type</td>
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<tr>
<td>2nd Call Number</td>
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<tr>
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<td>Delivery Type</td>
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