Best Practice Recommendation: Gifts

Recommendation
The Acquisitions Advisory Team recommends that order (accession) records be created for materials received as gifts.

Rationale
Most libraries already create order records for gift materials received on standing order or by subscription. Extending this practice to monographs received as gifts ensures that statistical reports will include all materials received in the library.

In addition, the creation of a monograph order record will automatically generate an item record for display of receipt status in the OPAC.

Creating order records for gifts eliminates the need to establish alternate workflows for these materials.

Reporting
Order records can be coded in various ways to provide information on the sources and types of materials received as gifts.

The Material Type field can be used to identify format of material received in general (video) or more detailed (videodisc) terms. Additional Material Type codes can be added to the existing list if necessary (request new codes via the Aleph Support Center).

The Order Group field (10 char.) can be used for library-specific coding established locally to group materials in your own categories. Consistent coding (including attention to character position) is essential to ensure accurate reports based on content of this field.

Vendor records can be established for frequent donors providing another way of reporting on gift materials. XGIFT can be used as vendor code on records for materials received from infrequent donors.

Note that free-text fields such as Library Note or other note and reference fields are less useful for reporting since content cannot be as easily controlled as it can be in the fields mentioned above.
Creating order records for gifts

- Find or create a bibliographic record as usual
- Create an order record with special attention to the following fields

**Tab 1: Order Information**
- Material Type [as appropriate]
- Acquisition Method G (Gift)
- Order Status SV (Sent to Vendor)
- Order Group (optional) [library-defined coding]

**Tab 2: Vendor Information**
- Vendor Code XGIFT [or established vendor code]

**Tab 3: Quantity Information**
- Unit Price [leave blank]

The Create Item Record box should be checked.

The GIFT-DEFAULT budget will be added to the order. This is a system-wide "budget" that is automatically assigned to any order where the Unit Price field is blank or zero. GIFT-DEFAULT will appear in the Budget column on the Order List clearly identifying the material as a gift. Note that if you do enter a price in the Unit Price field, the GIFT-DEFAULT budget will not be used and the Budget column will be blank on the Order List. We recommend leaving the Unit Price field blank.

- Highlight the order on the Order List and click on the Arrivals button to record receipt (Arr St on Order List should change to Cmp)