Email List Orders in Aleph

NOTE: These are instructions for sending List orders by email. See separate document entitled Email Letter Orders in Aleph for information on sending email letter orders.

Best Practice recommendations from the Acquisitions Team

- We recommend that each Order Unit establish clear policies on email orders and communicate those policies to all staff in the unit.

- We recommend that you contact the vendor before sending email Letter or List orders to make sure that they will accept the orders. Some vendors may request a sample email order. If you need a sample order, please contact OIS via the Aleph Support website …

http://hul.harvard.edu/ois/systems/aleph/forms/f-supp-acq.html

The following is required for sending List orders by email:

- Master vendor record must have email address on Order Address tab;

- Workstation must be configured with email address information;

- List Send Method in the Order Unit vendor record must be set to EMAIL.

A. Email addresses in vendor records

To determine whether there is an email address for orders in a master vendor record:

In the Acquisitions module,

1. Click on the Administration tab then on Vendors to open the Vendor List

2. Highlight the appropriate vendor

3. Click on the Address button on the right

4. Check the E-mail field on the Order Address tab for an email address

Revised: May 19, 2006
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http://hul.harvard.edu/ois/systems/aleph/docs/email_list_orders.pdf
If there is no email address on the Order Address tab in the master vendor record, you may request that one be added. Master vendor records are maintained by staff in the HCL Financial Office. Submit requests to add an email address to an existing vendor record using the Aleph Vendor Request Form at...

http://hul.harvard.edu/ois/systems/aleph/docs/f-vndr-form.html

Because email addresses are entered at the master record level, the email address must be one that can be used by all library acquisitions departments. It should be the vendor’s order department email address rather than the personal email account of your library’s contact person.

B. Workstation configuration for email list orders

Please consult with your IT Department before making changes to the ALEPH client on your desktop.

The following information must be added to the MAIL section of the Alephcom.ini file (AL500nnn/Alephcom/Tab/Alephcom.ini):

- MailServer=[your mail server address]
- FromAddress=[your department email address]
-MailerName=[your department name]

Example [this is a generic HCL example; be sure to use the correct information for your own unit]

Mailserver=smtp.fas.harvard.edu
FromAddress=acqdept@smtp.fas.harvard.edu
MailerName=Berstler Library Acquisitions Department

Best Practice recommendations from the Acquisitions Team

- We recommend that you set up an email account for your acquisitions department (rather than using a personal email account).
- We recommend that you configure all workstations in the acquisitions area in the same way so that anyone can use any workstation for placing orders.
C. Setting EMAIL as default for List orders in Order Unit Vendor record

When you choose List as Order Delivery Type, you are not given the option to choose EMAIL for Send Letter By in the order record. You will see that the Send Letter By field (and the Letter Type field) disappear from the Vendor tab in the order record when you choose List as Order Delivery Type. To send List orders by email, you must set List Send Method in your Order Unit vendor record to EMAIL. All List orders for that vendor will then go via email.

D. Sending List orders by email

Once an email address has been added to a master vendor record, your workstation has been configured properly, and you have set up EMAIL as default in your Order Unit Vendor Record, you will be able to send List orders by email.

1. Create order as usual but select LI (List) as option for Order Delivery Type on Tab 2 of the order record.

   NOTE: If you choose List but you have not set List Send Method to EMAIL in your Order Unit Vendor Record, the list will be printed.

2. Click on Send and the Order Status will change to RSV (Ready to Send to Vendor).

Order Lists are produced overnight via a batch job set up by OIS. Order Lists set up to go by email are sent when the Print Daemon is activated by your authorized Print Operator. This happens at the same time that regular Order Lists are printed.

See document Printing batch products in Aleph for more information on batch products. This document is available on the web at …


The list of orders will be printed in the text of the email message.

The list of orders will also be sent as an attachment to the email message (the format of the attached list order is the same as a regular printed list order).

The From address on the email message will be your department’s name and email address.

The Subject line will read Purchase Order List.

Keep in mind that you cannot retrieve an order sent by email. Be sure to review the order before you click on Send!

See Appendix I for example of an email list order
**E. Order Unit vendor records and email list orders**

As noted above, you must set EMAIL as the default for List Send Method in your Order Unit Vendor Record to send List orders by email. If you want to include the vendor’s contact name or your account number in the email message (and on the attached list order), you can enter this information into an Order Unit vendor record as well.

Note that there are two account number fields: Account No.(M) prints on Monograph orders and Account No.(S) prints on Serial and Standing Orders.

See document *Order Unit vendor records in Aleph* for more information on Order Unit vendor records. This document is available on the web at …

[http://hul.harvard.edu/ois/systems/aleph/docs/order_unit_vendor_records.pdf](http://hul.harvard.edu/ois/systems/aleph/docs/order_unit_vendor_records.pdf)

**F. Departmental email addresses**

Departmental email addresses may be added to the return address for your Order Unit. Submit requests to add email addresses through the ALEPH support website (use category: Acquisitions/Financial) at …


Note that this email address will appear on all orders (not just orders sent by email).

Please send questions about email list orders to the Aleph Support website at …

Appendix I: Example of email list order as it appears in email message

From: "OIS Acquisitions Dept." <ois_acq@harvard.edu>
To: <orders@vendor.com>
Cc: 
Date: Mon, 22 Sep 2003 13:31:53 Eastern Daylight Time
Subject: Purchase Order List
X-Mailer: WC Mail

[For your convenience, a copy of this order is also included as an attachment.]

NOTE: The text END OF PURCHASE ORDER LIST appears after the last order. If you do not see this text, some orders may have been lost in the email transmission. Contact the sender if you think some orders may be missing.

PURCHASE ORDER LIST

FROM:
OIS Library
Harvard University
Cambridge, MA 02138 / USA

TO:
Walter Kaefer
Rue des Arsilliers, 26/4
Malmedy 4960 BELGIUM

Order Date: 09/22/03

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