Email Letter Orders in Aleph

Note: These are instructions for sending Letter orders by email. See the separate document entitled “Email List Orders in Aleph” for information on sending email list 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 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 Letter orders by email:

- Master vendor record must have email address;
- Workstation must be configured with email address;
- EMAIL option must be selected in the order record;
- The print configuration icon in Acquisitions module must be set to Normal Printing (order will not be sent by email if set to Preview).

A. Email addresses in vendor records

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

In the Acquisitions module,

a. Click on the Administration Tab then on Vendors to open the Vendor List

b. Highlight the appropriate vendor

c. Click on the Address button on the right

d. Check the E-mail field on the Order Address tab for email address
If there is no email address 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 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 orders

Your workstation must be configured for email orders.

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

1. 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.

2. The mail default for order letters in the print.ini file in the Acquisitions module must be set to allow email orders at the workstation (AL500nnn/Acq/Tab/Print.ini).

The choices for mail default are:

- M  Allow email orders
- P  Allow print orders only
- B  Send email and print orders

If there is an email address in the vendor record and your department’s email address has been entered correctly and you have set Send Letter By in the order record to EMAIL and …

... your mail default is set to M, your order will be sent by email;

... your mail default is set to P, your order will be printed;

... your mail default is set to B, your order will be sent by email and printed.

We recommend that you set the default to M (if you set it to B so that the order is sent by email and printed, you may end up sending duplicate orders to the vendor).

Example:

Order letter 00 N M orderltr.prn
C. Sending Letter orders by email:

Once an email address has been added to a master vendor record for a vendor and your workstation has been configured properly, you will be able to send Letter orders by email.

1. Create and add the order as usual, but select EMAIL as the option for Send Letter by on Tab 3 of the order record.

   NOTE: If you choose EMAIL but there is no email address in the vendor record, the order will be printed.

2. Right-click on printer icon in lower right corner of screen. Make sure printing is set to Normal Printing.

   NOTE: Order will not be sent by email if printing is set to Preview.

3. Click on Send and the order will be sent by email.

   The order will be printed in the text of the email message.

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

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

   The Subject line will read Purchase Order.

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

   [see next page for an example of an email order]
Example of email order:

From: "OIS Acquisitions Dept." <oisacq@harvard.edu>
To: <orders@vendor.com>
Subject: Purchase Order

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

PURCHASE ORDER

FROM:
OIS Library
Harvard University
Cambridge, MA 02138 / USA
Email: oisacq@harvard.edu

TO:
Yankee Book Peddler
999 Maple Street
Contoocook NH 03229-3374

Attention: Contact Name

We would like to place an order for the following item(s):

Order No.: 94143-2
Order Date: 18-Nov-2002
No. of Copies: 1
Vendor Reference: Catalog # 2299

Negotiating Jerusalem / Jerome M. Segal ... [et al.]
x, 341 p. : maps ; 21 cm.
(SUNY series in Israeli studies)

This is a vendor note.
This is a quantity note.
This is a price note.

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D. **Order Unit vendor records and email orders**

If you want to include the vendor’s contact name or your account number in the email message (and on the attached order), you can enter this information into an Order Unit vendor record.

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.

You may also use an Order Unit vendor record to set **Send Letter By** to **EMAIL** as the default for a particular vendor (make sure that all staff in your Order Unit are aware that this will be the default for that vendor).

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_In_Aleph.pdf](http://hul.harvard.edu/ois/systems/aleph/docs/Order_Unit_Vendor_Records_In_Aleph.pdf)

E. **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 orders to the Aleph Support website at …