Changing a Serial Order to a Standing Order

Changing a Serial Order to a Standing Order

1. Close the Serial Order
   - Open the Acquisition Module, Order Tab and bring up serial order.
   - In the Order List, highlight your order.
   - On Tab 2 of the Order Form click on Order Status and Choose CLS for Order Closed.
   - If there’s any important processing information in the Library Note field that you want for the standing order, you can highlight it and press Ctrl and C to copy it. Later, you can paste this information into the standing order Library Note field by pressing Ctrl and V.
   - Click Update to save the Serial Order record.

2. Edit the Serial Order Order Log
   - Click on Order Log from the left hand side of the screen. If there’s any important processing information or other relevant note information that needs to be added to the standing order, you should add it.
   - Delete any action dates. Highlight the entry that has an action date and click on the Remove A. Date button.

3. Create a Standing Order
   **A note about encumbrances:** If you need to encumber the order on the serial order, you will need to create the order and send it. Since you are just changing an order type, you really do not send the order. What you can do is set your printing preferences to Preview, and this will allow you to click the Send button to encumber the order, but you will just receive a print preview of the order.

   To set your printing preferences to Preview
   - Point your mouse at silver printer icon on the lower right of the screen
• Right-click on the icon—a menu will appear

• Highlight Preview and left-click on it

This will set your preferences.

**To add your Standing Order:**

• Click **Add** on the Order List.

• Select Standing Order for order type and click **Ok**.

• On Tab 2 of the Order Form, enter correct **Sublibrary, Material Type, Acquisition Method** and **Order Unit**. Enter any note information that you saved from the serial order into the Library note field by pressing **Ctrl** and **V**.

• On Tab 3 of the Order Form, enter appropriate Vendor information. Fill in the **Max. Arrival Days** field. You can enter your **Subscription Start** and **End** dates, although this is not necessary.

• On Tab 4 of the Order Form, fill in the **Number of Units**: Note: *Most libraries don’t encumber serial/standing orders once the first piece has come in. However, at this point, staff can do one of two things if they want to associate a budget with their order.*

• You can’t fill in a budget code in the **Encumber Budget** field unless you encumber. To encumber, you need to fill in the **Unit Price** field (this price could be $0.01 if necessary), click on **Refresh** and then encumber the appropriate budget.

• If you want to record the budget without encumbering, you can enter the budget code in the **Price Note** field.

• Click on **Add** to add the Order

• Click the **Send** button to get the Print Preview. This will encumber the budget.

**4. Edit the Standing Order Order Log (only if you need to add notes)**

• Click on the **Order Log**. Enter any note information that you saved from the serial order order log into the **Log Text** field. You might want to note that this order has changed from a serial to a standing order.

• Set any relevant action dates.

**5. Edit Items to Associate them with the Standing Order not the Serial Order**
• Click on the Overview button to move the title from Acquisitions to the Items Tab

• Highlight the first item for your sublibrary.

• In Tab 2 of the Item Form, In Tab 1 of the Item Form, delete the link to the 85X Type/Linking Number and click on Update to save the changes.

• On Tab 3 of the Item Form, click on the arrow next to the Order Number. Select the Standing Order Order Number.

• On Tab 4, delete link to Subscription Record.

• Repeat this process for all items previously associated with the Serial Order. Note: Unfortunately, Global Changes in the Items and Serials modules do not allow you to globally change the order number field for items, so you must do them one at a time.

6. Delete Serial Subscription and Edit Holdings Record

• Click on Overview and select the Serial Tab button

• When the Serial Tab opens, click on Subscription List.

• Highlight your sublibrary’s serial subscription and click Delete. Note: This will only work if there are no items attached to the subscription, which is why we need to link the items to the standing order first.

6a. If the Title was Predicted

• Click on the Overview and highlight your holdings record from the left hand side of the screen.

• Click on Catalog Record button. The Cataloging Module will open and the holdings record will display on the screen.

• Delete the 853X field and save your changes to the server and local drive.

6b. If the Title was not Predicted

You don’t need to do anything, as you will have no 853X field in your Holding record.

7. Check Standing Order

• From the Holding record, push your title to the Acquisitions module by clicking on the Open Acquisitions record icon.

• In the Order List, highlight your standing order and click on the Item/Subscription node. Confirm all items are now associated with the Standing Order.
Changing a Standing Order to a Serial Order

1. Close the Standing Order

- Open the Acquisition Module, Order Tab, and bring up your standing order.
- From the Order List, highlight your order for your sublibrary
- On Tab 2 of the Order Form click on **Order Status** and Choose **CLS for Order Closed**.
- If there’s any important processing information in the **Library Note** field that you want for the serial order, you can highlight it and press **Ctrl and C** to copy it. Later, you can paste this information into the serial order **Library Note** field by pressing **Ctrl and V**.
- Click **Update** to save the Standing Order record.

2. Edit the Standing Order Order Log

- Click on the **Order Log** on the left hand side of the screen.
- Add any information relevant to the closing the order.
- Delete any action dates. Highlight the entry that has an action date and click on the **Remove A. Date** button.

3. Create a Serial Order

**A note about encumbrances:** If you need to encumber the order on the serial order, you will need to create the order and send it. Since you are just changing an order type, you really do not send the order. What you can do is set your printing preferences to Preview, and this will allow you to click the Send button to encumber the order, but you will just receive a print preview of the order.

- Click **Add** on the Order List.
- Select Serial Order for order type and click **Ok**.
- In Tab 2 of the Order Form enter correct **Sublibrary, Material Type, Acquisition Method** and **Order Unit**. Enter any note information that you saved from the standing order into the Library note field. You may want to add a note indicating that this changed from a standing order.
- In Tab 3 of the Order Form, enter appropriate Vendor information. Enter your **Subscription Start** and **End** dates.
- In Tab 4 of the Order Form fill in the **Number of Units:** Note: Most libraries don’t encumber serial/standing orders once the first piece has come in. However,
at this point, staff can do one of two things if they want to associate a budget with their order.

- You can’t fill in a budget code in the Encumber Budget field unless you encumber. To encumber, you need to fill in the Unit Price field (this price could be $0.01 if necessary), click on **Refresh** and then encumber the appropriate budget.

- If you want to record the budget without encumbering, you can enter the budget code in the **Price Note** field.

- Click on **Add**

4. Edit the Serial Order Order Log (only if you need to add notes)

- Click on the **Order Log**. Enter any note information that you saved from the standing order order log into the **Log Text** field. You might want to note that this order has changed from a standing to a serial order.

- Set any relevant action dates.

5. Create Subscription Record

- From the Order Tab, click on **Items/Subscription**.

- Click **Add** to add a new Subscription

- On Tab 2 of the Subscription Information Form, fill in the **Item Status** field. Click on **Hol. Link**. Select your sublibrary’s holding. Click **Refresh**. Fill in Temporary Location if relevant 

- On Tab 3 of the Subscription Information Form, Add the claim dates. Add any notes or check-in notes. Add **Copy ID** if relevant. Add **Remote Storage ID** if relevant and then click on **Update** to save the changes to the server.

**Note: If you do not wish to predict the title, proceed with 6a. If you wish to predict items**

6a. Edit Items to associate them with the Serial Order not the Standing Order

- From the Order List, highlight your standing order and click Overview.

- Click on the Items Tab.

- Highlight your first item and click on Tab 4 of the Item Form. Link item to correct Subscription no. by choosing the Subscription from the drop down menu.
• In Tab 3 of the Item Form, click on the arrow next to the Order Number and select the Serial Order Number.

• In Tab 2 of the Item Form, link to the 85X Type/Linking Number by entering the appropriate link number in the first box. Then click on the down arrow in the second box and select the appropriate pattern. Click on Update to save the changes.

• Note: If there is no 85X field available, you will have to create an 853 in the Holdings record and then come back to the Item form and modify the items: Click on Tab 6 of the Item Form. Click on Edit to bring up HOL record. The Cataloging Module will open and the Holdings record will appear on the screen. Create an 853 field and save your changes to the server and local drive. Then double click on the Item Record from the Record Manager Pane and link the 853 field in the 85X link field on Tab 2.

6b. Predicting Items

• For any existing items, follow the procedure in 6a to link all of the items to the serial order and subscription

• To create a set of predicted items for next year:

• Open up the title in the Cataloging Module and bring up the HOL record (if you have just followed the steps in section 6a, then click on Tab 6 of the Item Record and click Edit to bring up the holdings record directly).

• Create an 853 field (if necessary) and an 853X field and save your changes to the server and local drive.

• Push your title to the Serials Tab by clicking on the Open Serials record from the Cataloging Menu.

• Click on Subscription List and click the Open All button.

• Click on Check-In from the left hand side to see your set of Predicted Items.

Questions or Comments

If you have any questions about these instructions, please send a request to the Aleph Support Center in the category Acquisitions/Financial or Serials Processing: http://hul.harvard.edu/ois/systems/aleph/forms/f-supp-acq.html.

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