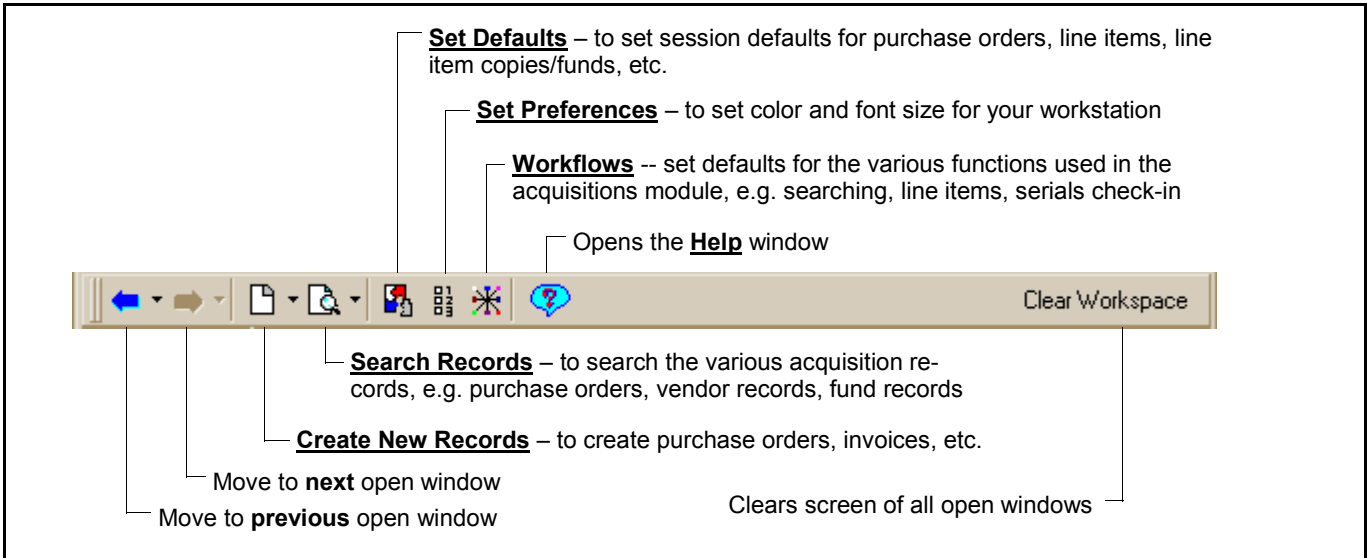


Acquisitions Toolbar



Setting Up Session Defaults

Disclaimer: These steps are only rough guidelines and are not prescriptive in any way. Try to customize your session to suit your own needs.

To get to **Sessions Defaults**: Click on **Tools > Defaults**, or click on the **Set Defaults** button on the toolbar.

(a) Purchase Orders

- Specify Vendor Code, Currency, Order Type (Batch orders accordingly)

(b) Line Item

- Cancel and claim intervals are set according to departmental policy
- Use the boxes provided to indicate the **donor** or **requestor** of the item
- In the **Requestor** box, enter the selector's initials (lowercase) followed by a semicolon, and the full name of the patron who requested the item (uppercase).
E.g. "sfr;PATRON NAME"

(c) Line Item Copies/Funds

- Specify the Intended Location, Number of Copies, Ship to Location and the Fund. Use the drop-down menus provided to select locations and funds.
(I.e. Click on the (+) sign to expand each fund level until you reach the fund you want)

Note:

Specify the intended location **BEFORE** entering any additional information. Once an intended location is specified, fill in the fields in red.

(d) Invoice

- Specify Bill To Location, Vendor Code and Currency

Vendor Code:

Click on the **red check mark** after typing in the Vendor Code to enable the system to recognize and retain the code

To Search for a Vendor, click on the **magnifying glass icon** to open the Search Window

Note:

The session defaults may be changed at any time. They can be manually overridden in the individual purchase order or invoice. It is not necessary to supply values for all fields; you may choose to fill in only some of them, or none at all.

Setting Up Workflows

Some Important Workflow Settings

Searching:

- (a) Bibliographic Staff Searching/Import
 - ✓ Retain Last Search"
 - ✓ Automatic Truncation"

Line Items:

- (a) Quick Line Items
 - ✓ Quick Line Items Upon Add
 - ✓ Quick Line Items for Edit/View Details
- (b) Select Show Line Item Relations
 - ✓ Everything under Show Marks/Claims
- (c) Monographic Receive Processing
 - ✓ Expand Receive Tree during Receive & Select to Copy Level

WORKFLOWS AT A GLANCE

Ordering

1. Batch orders by vendor
2. Set session defaults if necessary
3. Create new purchase order (PO)
 - i. Click on **Orders** on the List Bar > **New Purchase Order**
 - ii. Check to see if information on PO is correct, Add or Edit information as necessary, Click on **Save**
 - iii. Note down the PO number

You are now ready to add line items to your pending PO

4. Add Line Items to the PO (part one)
 - i. From the pending PO, click on **Add Line (Bib Search)**

(a) When a record is found in Orbis,

- ii. Click **OK** to add the record as a line item to the PO
- iii. On the PO > Select the line item > Click on **MARC**

Note:

You should be logged into the Cataloging module throughout the entire session. Clicking on the **MARC** button will open up the line item's bib record in the Cataloging module. From the Cataloging module, you will be able to view holdings for that particular title to see which Yale library owns it.

- iv. If you decide to order this title, **skip to step 7, part v.**, and enter in line item information
- v. If, after viewing the Yale holdings, you decide **NOT** to order the line item, delete the line item by selecting it and clicking on **Delete**

(b) If no records found, (i.e. No duplicates exist) continue to **search for the record in LCDB, RLIN, OCLC**

Rationale: You will need to search for and add the record to the database before you are able to add it to the PO as a line item

5. Open the Cataloging module and search for records in

(a) **LCDB**

- i. Set Mapping to MARC21 (Options > Preferences > Mapping > Local Import > MARC21 > OK)
- ii. Click **Search**
- iii. Click **Remote** > Highlight **LCDB** > **Add** > **Connect**

Title bar of Search screen should show:
"Remote Search: LCDB"

- iv. **REMEMBER:** Disconnect from LCDB after completing your search (Search > Remote > Clear > Connect)
- v. Search for the record
- vi. If record found, click on **Save to DB**
- vii. Skip to **step 7**

(b) **RLIN and/or OCLC**

- i. Open the Cataloging module
- ii. Set correct mapping: (Options > Preferences > Mapping > Local Import >

- * If importing from RLIN, set mapping to MARC21
- * If importing from OCLC, set mapping to OCLC

- iii. Open RLIN and/or OCLC and search for the record
- iv. Pass or export the record
- v. Go to Record > Import from New File > Open either OCLCImp or RLINImp > Open the RLIN/OCLC file (e.g. pass.sav) > Select the record > Click **OK**

Record should open as an **Imported Bibliographic record** in the Cataloging module

- vi. Determine whether the record is a standard OCLC or RLIN record
Standard OCLC Encoding Levels = blank, 1, I, L, 4 or 8
Standard RLIN record = CC value is 9660 or begins with 91 or 94
If it is a standard record **do not edit** any fixed or variable fields
- vii. If it is a non-standard record, check the correctness of the following fixed fields: record type, bib level, encoding level, place of pub., lang., form of item, date 1 and date 2
- viii. Validate author, added entries, series titles
- ix. **Save to DB**
- x. Skip to **step 7**

If **NO** records were found in LCDB, RLIN, OCLC, then

6. Create a preliminary record
 - i. Open the Cataloging module
 - ii. Click **New** (on the Toolbar) to create a new bibliographic record
 - iii. **007:** Assign the value **5** for the encoding level
 - iv. **008:** Assign publication status **s**, supply pub. date, place of pub., lang., form of item
 - v. Add/Modify fields: 020, 100, 245, 250, 260, 300, 440, (if required, 700)
 - vi. Validate author, added entries, series titles
 - vii. **Save to DB**
7. Add Line Items to the PO (part two)
 - i. Return to the Acquisitions module
 - ii. Open the PO created in Step 3
 - iii. Click on **Add Line (Bib Search)**
 - iv. Search for the record > **OK** (This adds the record as a line item to the PO)
 - v. Enter information into the **Quick Line Items** window
 - vi. Click **Save**

Success! You've added a line item to the PO. Repeat steps 4-7 to continue adding line items

Line Items

To edit line item information:

1. Make sure that **Quick Line Item is ON** and **Select** the line item
2. Enter information into the fields such as the:
 - **List Price**
 - **Ship To Location** (be sure to select a location that is all UPPERCASE)
 - **Selector's Initials** (in the Requestor field)

WORKFLOWS AT A GLANCE

Create an Invoice

Invoicing Multiple Purchase Orders

1. Batch line items by vendor
2. Set Session Defaults if necessary
3. Create a new invoice
4. Fill in the fields in **RED**
5. Fill in additional information, such as Currency, Bill To Locations, etc... **Note:** currency information **CANNOT** be changed after invoice is saved
6. Click **Save**. The invoice is now **Pending**
7. Click on **Add Line Item from Order**
8. Search for POs from which to invoice
9. Click on **Display Line Items**
10. Select the line items/copies you want to include in the invoice by clicking on the white box(es)

Note:

- If **invoicing specific copies** of a line item, expand to the copy level by clicking on the **(+)**, and select the individual copies by clicking on the white box(es)
- See **Receiving During the Invoice Stage** for instructions on how to receive at this point

11. Click on **Append**, then **Close**
12. When the line items appear on the invoice, fill in information about the line item, such as its **Price**. To do that, **Highlight the Line Item** and Click on **Details**. Navigate through the different tabs on the Line Item window and fill in information as warranted. Click on **Save and Close** to return to the invoice
13. Fill in invoice amount, taking your \$ amount from the computed invoice total
14. Once the invoice is complete, Click on **Save** and then **Approve**

Invoicing a Single Purchase Order

1. Search for and Open the approved PO
2. Click on **Order > Create Invoice**
3. This creates a new Invoice with all the line item information from the PO
4. Complete line item information on the invoice as necessary. The price of each line item carries over from the PO

After approving the invoice, you will see that the **Related Invoices** tab on the PO is now highlighted. The invoice you've just created will appear in that window. Retrieve the invoice by selecting the **Invoice Number** and clicking on **Invoice**

Receiving

This is a generic receiving procedure. These steps have been outlined to help you understand the process of receiving items, and are not prescriptive. Use this as a guide and customize it according to your needs.

Note:

- You may receive or mark items only after:**
- (a) A purchase order has been approved **OR**
 - (b) An invoice has been approved or is pending

Receiving During the Purchase Order Stage

(a) To receive a single item:

1. Search for the PO
2. Highlight the line item
3. Click on **Recv/Mark**. The Receive/Mark dialog box displays
4. Click on the white box next to the title. It will turn blue, indicating that it has been selected
5. Click on **Receive**

To enter item barcode:

6. Click on the **(+)** next to the title and expand the fields until all three levels are displayed: Title, Location, Copy
7. Click on the white box next to the Copy Number. It will turn blue, indicating that it has been selected
8. Click on **Item**. The Item record window opens
9. Enter the **Barcode**, **Item Type**, **Perm Loc** and other information as necessary
10. Save to Database
11. **Close** the Item record window
12. **Close** the Receive/Mark window
13. The **Line#/Status** of the received item should now say: **"Received/Complete"**

(b) To receive multiple copies of an item:

1. Select the line item
2. Click on the **Recv/Mark** button
3. Click on the **(+)** sign next to the title to expand the fields until all three levels are displayed: Title, Location, Copy
4. Click on the white box(es) to select the copies you want to receive
5. Click on **Receive**, then **Close**

Receiving...(cont'd)

(c) To receive all items on a PO:

After approving a PO, you may receive all the items on the PO by checking **Receive on Approve** on the pop-up window that appears after you click on **Approve**

Receiving During the Invoice Stage

Method 1

1. On the invoice, select the line item you wish to receive
2. Click on **Details**
3. Click on **Receive/Mark**
4. Click once inside the white box next to the Title to select it and it should turn blue, indicating that it has been selected

Note:

Expand to the copy level by clicking on the **(+)** and select individual copies if not receiving all copies of a title

5. Click on **Receive, Close**
6. **Save and Close** out of the Line Items window to return to the invoice

Method 2

1. Click on **Add Line from Order** from a pending invoice
2. Search for the PO from which to invoice
3. Select the PO from the Find Purchase Order window and Click **Display Line Items**
4. Select the line items you wish to receive by clicking on the box(es) next to the titles
5. Click on **Append/Receive** to simultaneously add and receive the line items to the invoice

Method 3

1. To receive all items on an invoice as you approve the invoice, check **Receive on Approve** on the pop-up window that appears after you click on **Approve**

Claims, Returns, Cancels

Note:

- Set your workflow options to **Show Line Item Relations** if you have not already done so. (See pg 1 for details on how to set up workflow options.)
- This enables you to see Line Item relations on the invoice or the PO and to generate Claims, Returns, Cancels more efficiently

1. Mark a line item/copy as a return, claim, or a cancel

- i. From either the PO or the Invoice, Select the line item
- ii. Click **Recv/Mark**
- iii. Click on the white box next to the title. It will turn blue, indicating that it has been selected

Note:

- If marking multiple copies, Click on the **(+)** sign next to the title to expand the fields until all three levels are displayed: Title, Location, Copy
- Click on the white box(es) to select the copies you want to mark

- iv. Select a **Mark Reason** using the drop-down menu
- v. Click on **Mark**, then **Close**
- vi. In the PO/Invoice window, you should see that an additional **Marked/Claimed** line has been created for the line item you have just marked

Status	Title	Price (Adjustm
Approved	Yeoman Fleetwood. By M. E	
Marked/Claimed	Issue Identification	Comp
Marked	N/A	N/A

2. To Generate a Claim, Return or Cancel

Method 1

- i. Select the **Marked/Claimed** line under the line item
- ii. If item is marked as 'Cancel', click on **Generate Cancel**
- iii. If item is marked as 'Claim', click on **Generate Claim**
- iv. If item is marked as 'Return', click on **Generate Return**

Method 2

(Make sure that Quick Line Items is OFF)

- i. Select the line item that you have marked
- ii. Click on **Details**
- iii. Click on the **Problems** tab
- iv. Here you may Generate a **Claim, Cancel** or **Return**, or **Unmark** the line item by clicking on the appropriate button

Bookmark these Sites

- **Orbis2 Training Documents** - workflows, item type tables, Diacritics chart
From Yale Library Home Page > Human Resources > Staff Training & Organizational Development > Course Offerings > Orbis2 Implementation Site > Orbis2 Training Documents
- **Orbis 2 Practice Sessions** - mastery checklists, training manuals and exercises, sign-up for extra coaching
http://www.library.yale.edu/training/stod/practice_sessions.html
- **Windows 2000 Skills Updater** - course documentation developed by Workstation Support Group on general Windows 2000 skills
<http://www.library.yale.edu/wsg/docs/updater/index.htm>