

AFO 217 – Potentials processing

217.1 Introduction

The objectives of Potentials files processing are:

- to create facilities for a much easier selection process
- to “hide” the technical part of the ordering process from the selectors
- to fully support a decentralised model in which selection is done decentralised, but ordering is done centrally
- to further automate the processing of the selection / order process

The general workflow for potentials file processing is as follows. Note that the process described in this section is optional; orders can, of course, still be created without having to go through the selection process as described in this section.

- a staff member uses AFO 278 to set up a Potentials import profile for a supplier, say Acme Books.
- periodically, the supplier sends a file containing potential titles. A staff member uses AFO 278 - Import potentials to load the file. The staff member is asked for the supplier to load for. The system uses the values from the import profile to process the file.
- Acquisitions selectors access the titles in the loaded potentials files and make selections for copies and locations
- At a specific time in the week, a staff member uses AFO 217 - Ordering process to turn selections in the potentials files into orders.

217.1.2 General characteristics

Potentials files processing has the following general characteristics and workflow.

- A “potentials file” (e.g. from NBD) is imported (/ converted) into the system using a standard Vubis Smart import profile. Potentials files are files that contain offerings from a specific supplier; they contain bibliographic information, price information and/or selection-supporting information such as reviews. The reviews are stored into the

bibliographic record in a new field / subfield. Typically, the files are loaded into background databases, although loading into a production database is also possible.

- The imported records are matched with the production database(s).
- Viewing the content / selecting from potentials files - a new AFO 217 is available to view the content (titles) of a potentials file. As an authorised selector, you can select copies of the title for your locations. The next bullet points describe some of the related functionality.
- The system shows a list of all available potentials files, ordered in reverse chronological order. New potentials files can also be created manually by authorised staff.
- The system offers filters to restrict the content of a potentials file (e.g. only view youth materials, only CD's, only fiction, etc.). You are able to select two different filters based on bibliographic content as well as filter by order number. The filters based on bibliographic content can be selected from any valid Element/group profile defined for the system. Multiple selections are allowed. Some examples of relevant criteria to filter by are: material type, order number, genre and code systems such as SISO or UDC. The filter is applied to each potential file and is based on the current user. The filter remains in effect for that user until explicitly removed.
- You can view (but not update) the bibliographic data of each record in the potentials file.
- You can view if any other library / branch participating in the same acquisition system has already attached orders (or selections) to a title in the potentials file.
- You can view budget information for those budgets that you are allowed to order from during the selection process.
- The system automatically matches the content of the potentials file with the content of the production database(s). The matching is done using standard matching profiles.
- Performance data is gathered for each record in the potentials file. This data can be viewed per location, per cluster of locations, per institution and system-wide. The order of the locations and cluster can be library-defined.
- Multiple people are able to access selection records simultaneously (i.e. the potentials bibliographic records will not be locked).
- Potentials files that have been imported or created longer than n days are automatically removed from the initial display. (The minimum value of n is 14, the maximum is 365.) Note that the files are only removed from the display and not from the system. All files

are accessible from the overview screen through a specific option (allowing one to select any potentials file from the list of existing potentials files).

It is possible to copy a record from a potentials file to another, manually created, potentials file. In this case, only the bibliographic data of the potentials record is copied. Selection data is not copied.

217.2 parameter settings

For the use of potentials files it is necessary to define various parameters. A brief overview:

AFO 241 – Suppliers. The vendor supplying the potentials files must be defined here. You can also define the vendors' EDI parameters here.

AFO 243 – Budgets. In the budget overviews the selections from potentials are also taken into account.

AFO 244 – Shipto codes. Can be used for processing the potentials file, i.e. determine where the ordered materials must be shipped to.

AFO 272 – Acquisitions parameter control – Miscellaneous. Contains the parameter for the source of the vendor order number.

AFO 272 – Acquisitions parameter control – Potentials. Contains various important parameters.

AFO 277 – Acquisitions Lists – Order distribution lists. To set up distribution lists containing information such as standard number of copies to be ordered for each branch, budget codes, shipto codes, for ease of ordering.

AFO 278 – Importer/Export. The AFO where you define the importing profiles and actually process the imports as well.

Restrictions in AFO 611 – Login restrictions – Acquisitions – (continued) and in the Acquisitions function restrictions form in AFO 611 – Add/modify login – Authorisations – Acquisitions. These restrictions are set at the user level.

217A – allow selections in potentials files

217B – create orders from selections in potentials files

217C – allow manual creation of potentials files

217D – allow addition of titles to manually created potentials files

AFO 272 – Acquisitions parameter control – Order authorisation passwords.

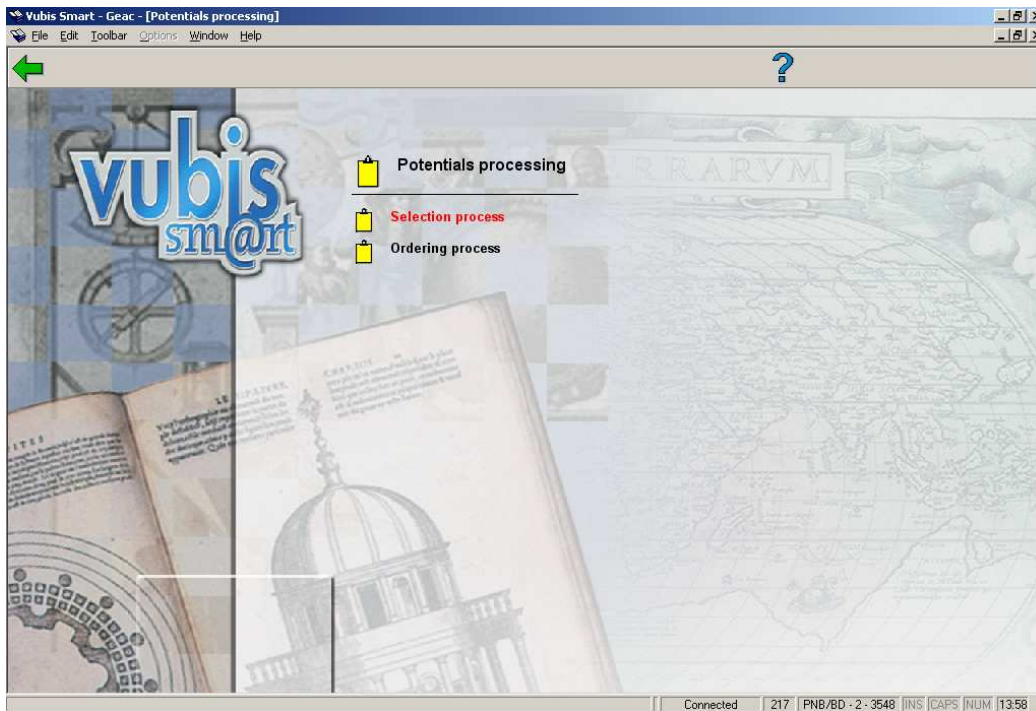
AFO 277 – Acquisitions Lists – various restriction options (by budget, material type etc).

AFO 133 – Input/Output profiles. To define the import profile for potentials files.

AFO 134 – Conversions. To define the conversion profile that is used by the import profile.

217.3 Potentials processing

This AFO has two menu selections:



Selection process – making selections in imported/manually created potentials files

Ordering process – turning selections into orders

Each of these processes requires further authorisation before you are allowed to continue (i.e. 217A – allow selections in potentials files, 217B – create orders from selections in potentials files).

217.4 Selection process

Choosing this menu option presents you with a screen displaying various files:

No	Id	Description	Date loaded	Last updated	Last processed	Type	Titles
1	bn_a_8	ACME import profile	23 Feb 2005 10:24			Import	15
2	bn_a_7	ACME import profile	23 Feb 2005 10:22			Import	5
3	bn_a_6	ACME import profile	23 Feb 2005 10:20			Import	5
4	bn_a_5	ACME import profile	23 Feb 2005 09:54			Import	5
5	bn_a_4	ACME import profile	23 Feb 2005 09:49			Import	0
6	bn_a_3	ACME import profile	23 Feb 2005 09:39			Import	5
7	P00000006	PARTJUREAU Manual potentials	22 Feb 2005 15:29	23 Feb 2005 09:22		Manual	1
8	za0_0339	NBD potentials	22 Feb 2005 14:05	23 Feb 2005 09:37	22 Feb 2005 15:49	Import	4
9	bn_a_2	ACME import profile	22 Feb 2005 13:53	22 Feb 2005 17:03	22 Feb 2005 14:27	Import	5
10	bn_a_1	ACME import profile	22 Feb 2005 13:42	22 Feb 2005 15:33		Import	0
11	P00000004	STICHTING Manual potentials 3	22 Feb 2005 13:29	23 Feb 2005 09:22	22 Feb 2005 15:10	Manual	3
12	P00000003	ACME Manual potentials 2	22 Feb 2005 10:38	23 Feb 2005 09:22		Manual	0
13	bn_a	ACME import profile	21 Feb 2005 16:28			Import	0
14	P00000001	ACME Manual potentials 1	21 Feb 2005 16:06	23 Feb 2005 09:21	22 Feb 2005 14:27	Manual	0

Columns on the screen

“**Id**”: is either the internal Id from the potentials file or the alternate Id from the potentials file if the alternate Id exists (i.e. an Id based on the name of the input filename).

“**Description**”: is the Description field from the potentials file.

“**Date loaded**”: is the date and time the potentials file was created via AFO 278.

“**Last updated**”: is the date and time the potentials file was last updated.

“**Last processed**”: is the date and time the potentials file has last been processed for turning selections into orders.

“Type”: is how the potentials file was created: either by “Import” or “Manual”.

“Titles”: is the total number of titles in the potentials file.

When this screen is initially displayed, only files created within the last number of days display initially. The cut off date is displayed above the list of potentials files. The cut off date number of days is set up in AFO 272 - Potentials. The list is ordered in reverse chronological order.

Options on the screen

Add manually (I): You use this icon to create a new manually-created potentials file. See section 217.4.1.

This icon is controlled by the AFO 611, Login restrictions – Acquisitions continued, Manually create potentials files (restriction 217C).

See all/partial files (D): You use this icon to redisplay the screen showing ALL potentials files or only the ones from after the cut off date in potentials file. The cut off date number of days from today's date is set up in AFO 272 - Potentials.

Select no (+) [*]: Select the potentials Id from the list that you want to display and press the select no (+) icon. When you select the Select no (+) icon the system responds by displaying the screen showing the titles in one specific (selected) potentials file. Only the titles that meet the filtering restriction criteria are shown. The filter remains in effect until explicitly removed (cleared).

The screen displayed is the Potentials file overview – Id where Id is the Id out of the potentials file.

Yubis Smart - DEVbsmart-devnamespace - [Potentials file overview - za0_0339]

File Edit Toolbar Options Window Help

Description NBD potentials
 Created 22 Feb 2005 14:05
 Created by John Smith
 Type Import
 Profile used NBD/Biblion (NBD - 251)
 Number of titles 4
 Default supplier NBD/Biblion (NBD - 251)
 Order type on_approval (ZSSS)
 Last updated 23 Feb 2005 13:47
 Last processed 23 Feb 2005 13:23
 Filtered by
 Showing 4 out of 4

No	Title	Author	ISBN	My orders	My selections	Total orders	Total selections
1	Scheurboek / Annette de Vries	Vries, de, Annette	9025419909	2	1	2	1
2	De Villa / Danielle Steel ; [vert Steel, Danielle		9036421837	1	1	1	2
3	De naam van de roos & Nasc	Eco, Umberto	904614030X	0	0	0	0
4	Grote letter bibliotheek			0	0	0	0

Connected | 217 | PNB/BD | JNS | CAPS | NUM | 10:22 AM

At the top of the screen there is a header pane containing the following information:

Description, Created, Created by, Type, Profile used, Number of titles, Default supplier, Order type, Last updated, Last processed, Filtered by, Showing x out of xx.

Below the header pane is a grid. Each line in the grid represents a title in the potentials file. The columns are No, Title, Author, ISBN, My orders, My selections, Total orders, Total selections.

[Note that Title and Author data in this overview keep the values they had at import time. They are not updated when the bibliographic data is changed.]

A selection is equivalent to a partial order.

The “**My orders**” column contains the total number of selections ordered for the currently logged in selector.

The “**My selections**” column contains the total number of selections for the currently logged in selector.

The “**Total orders**” and “**Total selections**” columns are calculated by summing up the number of selections of all the selectors on this title.

Example : from the screen above line No. 2 De Villa / Danielle Steel

After a file that has been processed into orders, you would see 2, 0, 3, 0 in the last four columns for the first title.

If you then went into the title again to create a new selection, you would see 3, 1, 3, 1. These columns allow you to easily determine whether you have (or anyone else has) already selected a particular title. It also allows you to determine whether selections have already been processed into orders.

Options on the screen

Add title [I]: You use this icon to add a new title to a manually-created potentials file. This icon is only available if the file Type is manually created and you do not have restriction 217 D – Allow addition of titles to manually created potentials files set.

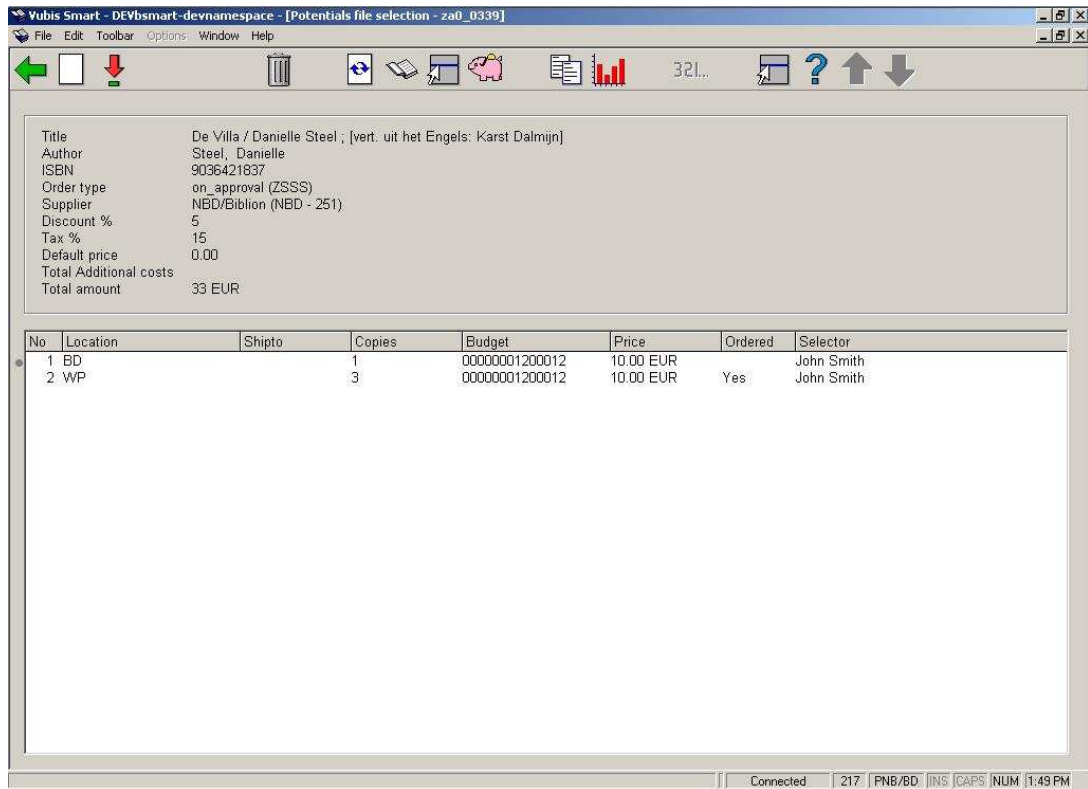
Jump to [J]: Use this option to jump to a particular order number. This option is only available if the list is sorted by external order number. After entering an order number, the list will be built from that number upwards. Previous numbers are no longer shown. To reset: choose the option again and leave the field blank.

Update header: You use this icon to change the default supplier and description for the potentials file. The system checks the new parameters in AFO 272 – Potentials to determine if an update of supplier should be allowed based on the Type of file. Any titles assigned to the original supplier will be updated with the new supplier.

Filter: To apply a filter to the titles shown.

Print: You use this icon to print the list of titles currently displaying in the Potentials overview using a SSP publish profile.

Select no(+)[*]: Select the Title from the list that you want to display and press the select no (+) icon. The system responds by displaying the screen showing the details for one specific title and the selections and orders for the selector logged in.



At the top of the screen there is a header pane containing the following information: Title, Author, ISBN, Order type, Supplier, Discount %, Tax %, Default price, Total additional costs, and Total amount.

Below the header pane is a grid. Each line in the grid represents a selection that you have already made for this title. The columns are No, Location, Shipto, Copies, Budget, Price, Ordered and Selector.

In the example above, you selected 3 copies for WP and the file was processed for ordering (Ordered flag column displays "Yes"). You then selected 1 copy for BD. This selection for BD has not yet been processed for ordering.

Options on the screen

The "Add selection", "Update selection" and "Delete selection" icons work in a similar way to partial order processing in AFO 211.

You are not allowed to change any data in a selection after it has been ordered.

Add selection [I] : If you select the "Add selection" icon, a form for entering a new selection is displayed:

Enter selection - 1

If you select a distribution list then any entries in the fields Destination code, Shipto code, Budget and Quantity will be ignored.

Distribution list	<input type="text"/>
Destination code	CEN
Shipto code	<input type="text"/>
Budget	PHB1 - PHB1
Selection code	<input type="text"/>
Material type	Books (BO)
Circulating stock category	<input type="text"/>
Specification	<input type="text"/>
Quantity	2
Unit price	60.16
Additional cost per copy	5
Note	<input type="text"/>
Name	<input type="text"/> <input type="button" value="Search"/>

OK
Cancel
Help
Update DistL

The same restrictions apply (regarding which locations you can place selections for and which budgets you can use) as when ordering materials through the normal ordering process (AFO 211, AFO 216).

The **material type** defaults from the first selection in the list.

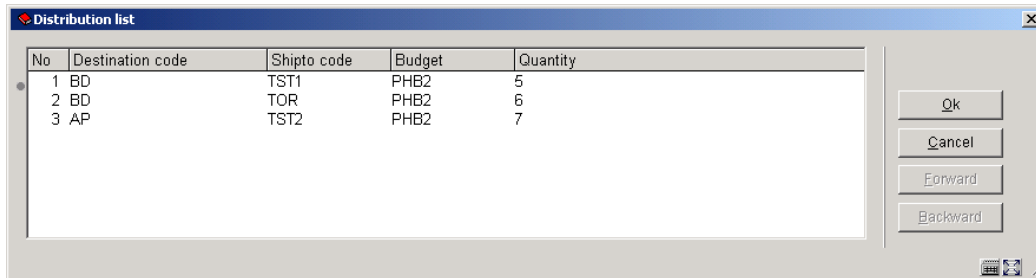
The **unit price** automatically defaults from data in the potentials file.

The **Specification** field is enabled only if the selected title is not a monograph.

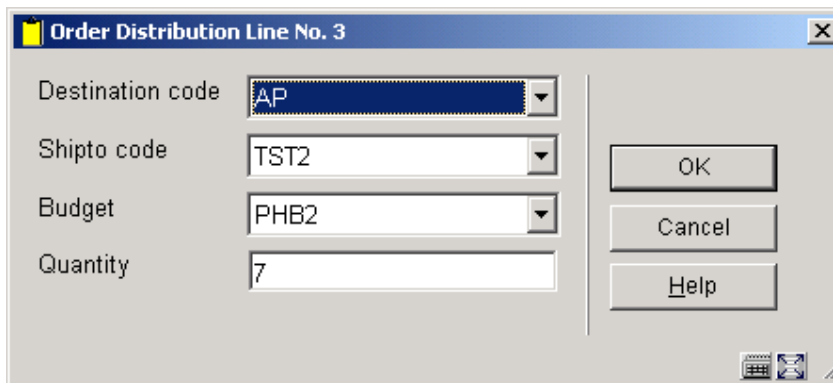
The **additional cost per copy** is multiplied by the number of copies and added to the total additional cost field in the title.

If you select a distribution list then any entries in the fields **Destination code**, **Shipto code**, **Budget** and **Quantity** will be ignored. You can do the maintenance of the Distribution list

using the **“Update DistIL”** button. The procedure is the same as when entering partial orders in AFO 211. After choosing this option a screen similar to the one below is displayed.



Selecting a line from the list, takes you into the form for the maintenance of that specific line:



Select no (+) [*]: The “Select no” icon can be used to make changes to your selection before the selection is turned into an order.

If you select the “Select no” icon, you will be prompted with a form similar to the one below:

Update selection - 1

Destination code	BD
Shipto code	TST1
Budget	new - new budget
Selection code	
New location	
New budget	
Material type	Books (BO)
Circulating stock category	
Specification	
Quantity	5
Unit price	60.16 EUR
Additional cost per copy	5
Note	
Name	
Notification	N
Reservation	N

Buttons: Search, OK, Cancel, Help

Delete selection (+) [S*]: The “Delete selection” icon can only be used for selections that are not yet ordered.

If you choose the “Delete selection” icon you will be asked for confirmation:

Yubis Smart

Are you sure that you want to delete this selection?

Buttons: OK, Cancel

The selection will be deleted if you press the “**OK**” button.

When selections are added, updated or deleted budget amounts are updated. The system checks to make sure that the budget you have chosen has enough money to cover your selection. If the budget does not have enough money, you are not allowed to save the selection. Selection amounts are added to a new field in the Budget record – Total current selections. When selections are turned into orders, the selection amount is removed from the Total selections amount and added to the Total current obligation amount in the budget.

View all selections [D]: You use this option to display a form showing all of the selections made for this title by all users. The selections are sorted by location for each selector. The copies column shows the number of copies selected. The ordered column shows how many of the copies have been ordered.

Note

As stated before, that any changes to the bibliographic data do not update the Author and Title display elements.

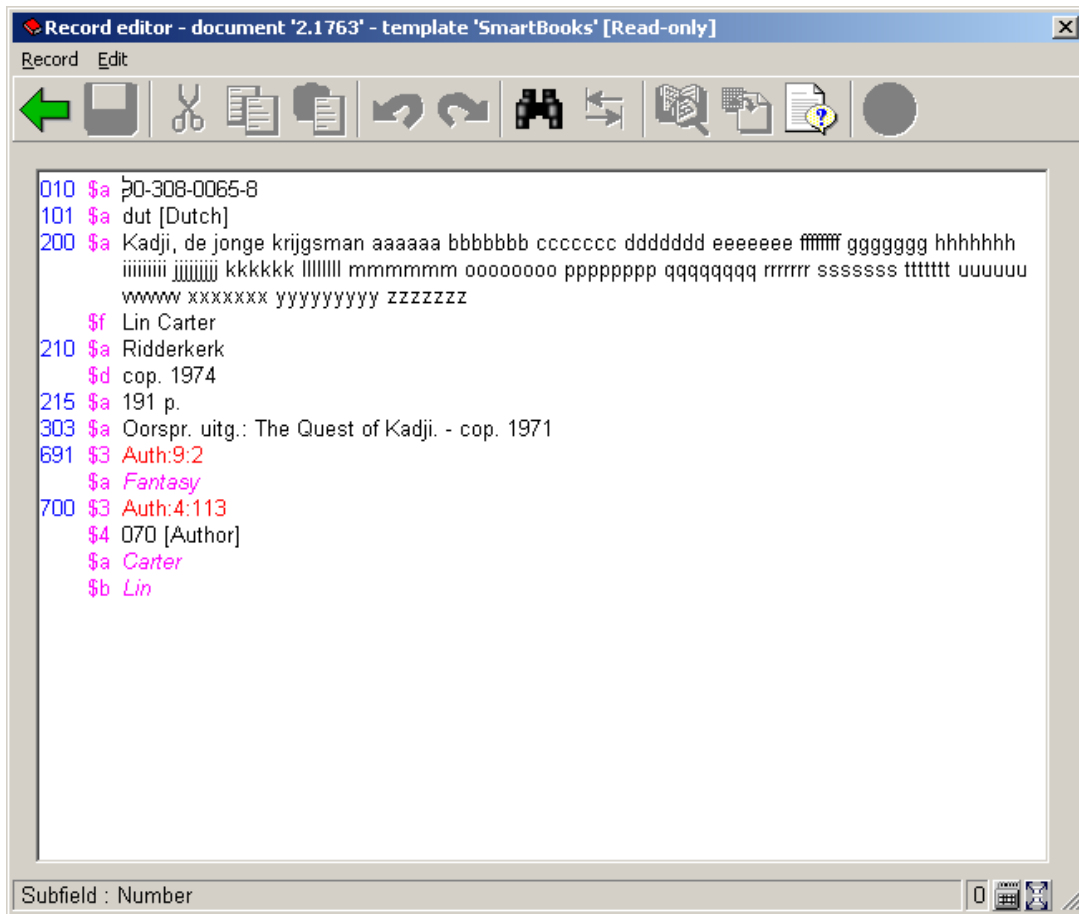


The screenshot shows a window titled "View all selections" with a table containing the following data:

No	Location	Copies	Selected by	Ordered
1	BD	1	Phil Oxley	0
2	BD	1	John Smith	0
3	WP	1	Phil Oxley	0
4	WP	3	John Smith	3

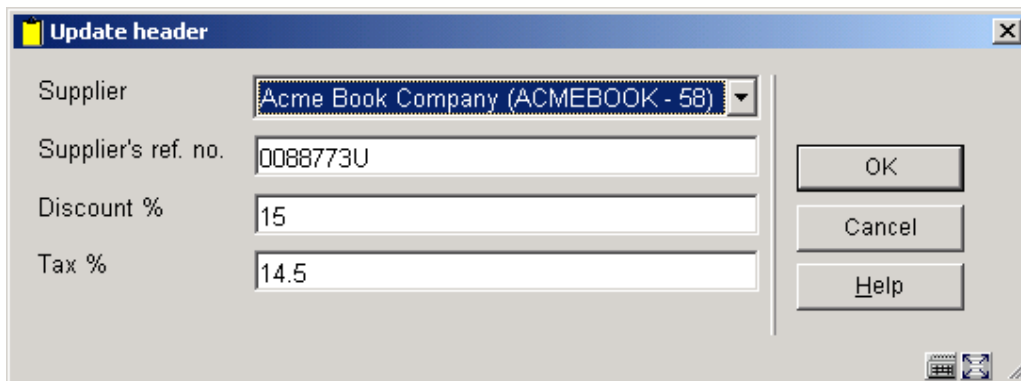
On the right side of the dialog box, there are four buttons: "Ok", "Cancel", "Forward", and "Backward".

View bib: Selecting this icon allows you to see the full bibliographic record that this potentials title is linked to. The record is displayed in the Record editor form (read only mode).



Update header [H]: The “Update header” icon allows you to change the Supplier, Supplier’s reference number, Discount percentage and Tax percentage for the selected title. The system recalculates budget balances after any changes to these fields. The ability to change supplier depends on the parameter settings from AFO 272 – Potentials.

The “Update header” form looks similar to the one below:



Depending on settings in AFO 272 – Miscellaneous, this input form may also contain the fields **Tax code**, **Export category**. See the Help for AFO 272 for more information. Tax code and Export category relate to export functionality via AFO 278. See the Help on this AFO for more information.

The 'Update header' dialog box features a title bar with a close button. The main area contains several input fields: a dropdown menu for 'Supplier' showing '0 (ABVAKABO - 312)', empty text boxes for 'Supplier's ref. no.', 'External order number', and 'Discount %', another empty text box for 'Tax %', a dropdown menu for 'Tax code' showing 'Tax code 1', and another empty dropdown menu for 'Export category'. On the right side, there are three buttons: 'OK', 'Cancel', and 'Help'. At the bottom right, there are small icons for a keyboard and a mouse.

View budget info: This icon displays a form allowing you to select one of the budgets that you are allowed to order from.

The 'Select a budget' dialog box has a title bar with a close button. It contains a single dropdown menu labeled 'Budget' with the selected value '00000001200012 - Biology'. To the right of the dropdown are three buttons: 'OK', 'Cancel', and 'Help'. Small icons for a keyboard and a mouse are located at the bottom right.

Once you have selected a budget, depending on the settings of Display all budget amounts when viewing budgets of AFO 272 – Potentials, you either get a detailed budget display screen when the option is selected

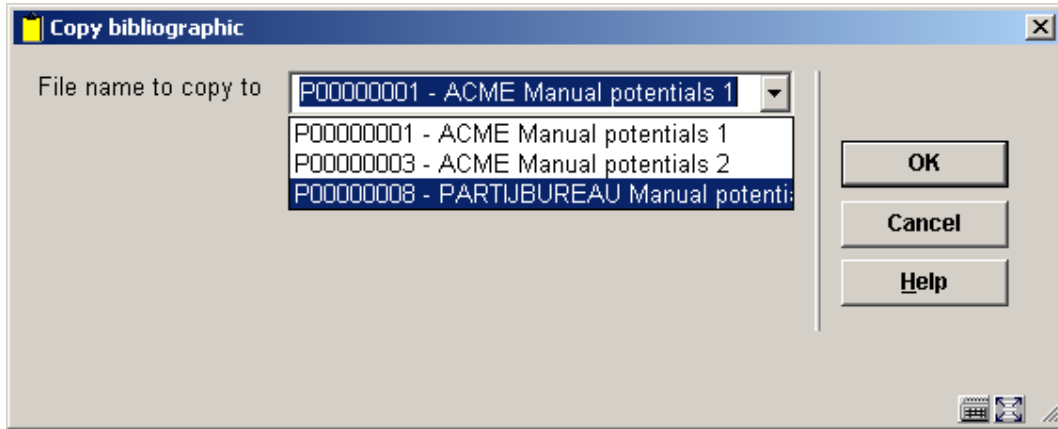
Budget code	862100.56102	
Wording	Journals N	
	Transfer acct figures	49724.25
+	Add funds	0.00
+	Special transactions	0.00
-	Invoices / orders paid	0.00
=	Accounting figures	49724.25
-	Total current obligations	35.25
-	Total current selections	0.00
=	Balance	49689.00

or a partial budget screen (showing only the balance in the budget) when the option is not selected.

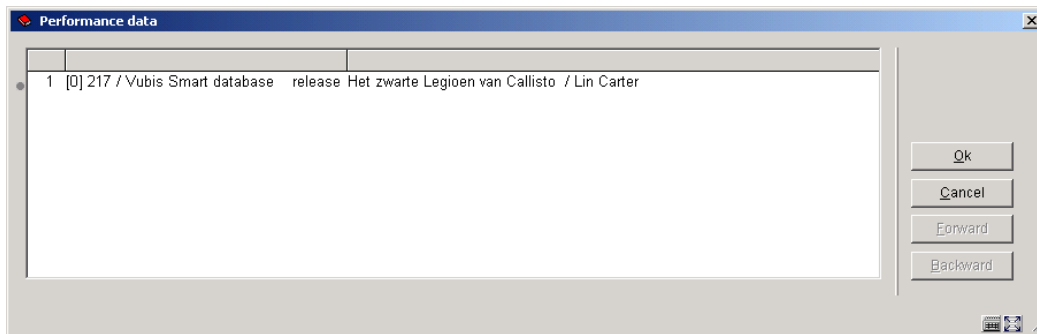
Budget code	862100.56102	
Wording	Journals N	
	Balance	49689.00

Copy bibliographic: The copy bibliographic icon copies the bibliographic and potentials title default information to another manually-created potentials file. When this button is selected, the system presents you with a form with a dropdown list of available manually-created potentials file. Only files with the same bibliographic format as the file you are copying from are displayed. For example, you cannot copy a MARC21 title into a potentials file containing UNIMARC/B titles.

The supplier defaults to the supplier in the potentials header record of the file you are copying to.



Performance data [PD]: The “Performance data” icon displays the performance data, as it would be shown if the same title was accessed in AFO 111.



No.	Criteria	Data
Location BD		
	Performance value	0
	Number of items	1
	Number of loans	0
	Number of reservations	0
	Average number of loans per 0	
	Average number of loans per 0	
	No. of items added by year	2005(1)
Institution PNB		
	Performance value	0
	Number of items	1
	Number of loans	0
	Number of reservations	0
	Average number of loans per 0	
	Average number of loans per 0	
	No. of items added by year	2005(1)
System		
	Performance value	0
	Number of items	1
	Number of loans	0
	Number of reservations	0
	Average number of loans per 0	
	Average number of loans per 0	
	No. of items added by year	2005(1)

The **Turn selections into order** icon is not enabled in the Selection process function of AFO 217. It is only available in the Ordering process function of AFO 217.

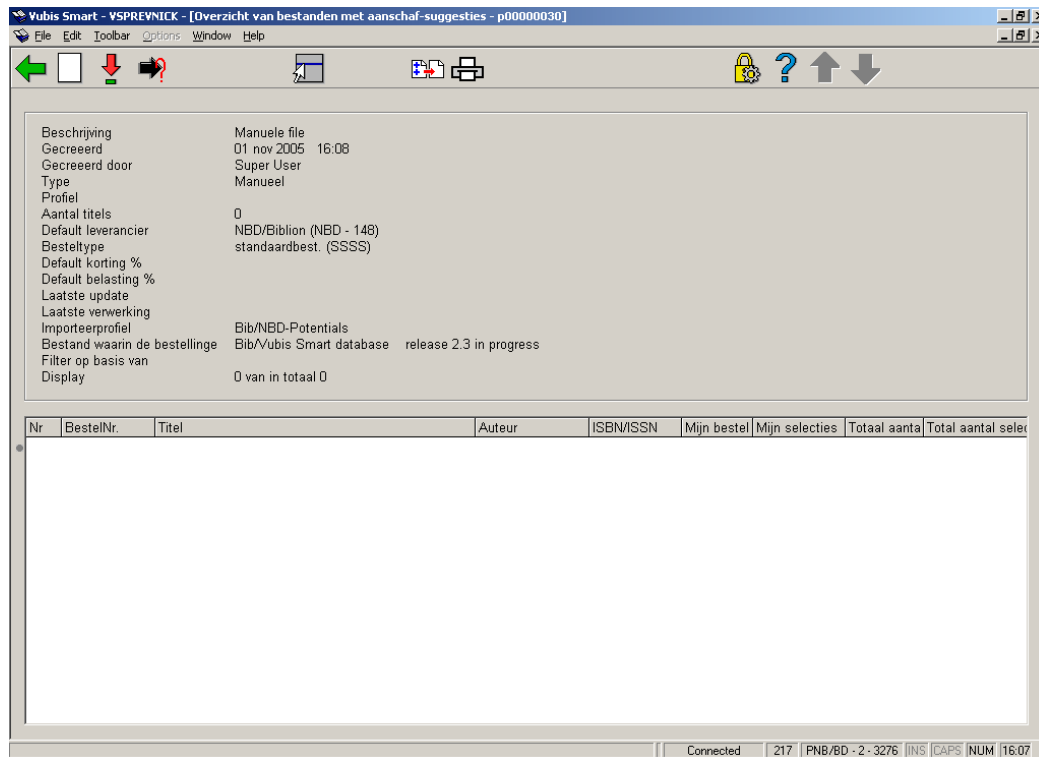
217.4.1 Adding a new manually-created potentials file

From the Potentials file summary screen (AFO 217 – Selections), choose the **Add manual** icon to create a new manually-created potentials file.

Potentials add manually	
Description	ACME manual Feb 23, 2005
Import profile	Z3950-Smart
Database to create orders in	Background database 1 for VSMAINT1302
Default supplier	58 <input type="button" value="Search"/>
Order Type	standard
Default discount %	10
Default tax %	17.5

The system prompts you to enter the Description, Import profile, Database to create orders in, Default Supplier, Order type, Default discount % and Default tax % fields. All but the Import profile, Database to create orders in, and Order type can be left blank.

After entering this information, the system displays the Potentials file overview – Id screen:

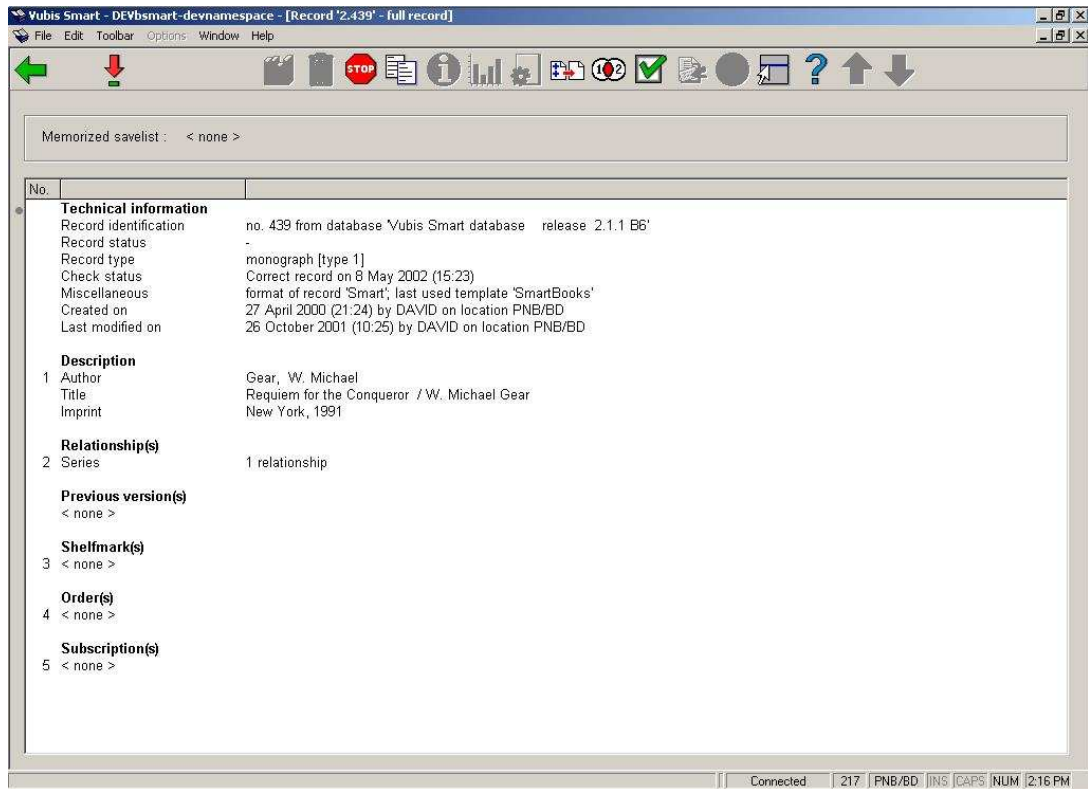


Add title (!): You use this icon to add a new title to a manually-created potentials file. This is only available if file Type is manually created and if you do not have restriction 217 D – Allow addition of titles to manually created potentials files set. Next the system will display the standard Bib/search selection screen:

Standard	System number	Z39.50
Search expression	<input type="text" value="fantasy"/>	
Select search method	<input checked="" type="radio"/> Find <input type="radio"/> Browse	
Select user index	<input type="text" value="All words"/>	
Language	<input type="text"/>	
Published until date	<input type="text"/>	
Location	<input type="text"/>	
Material type	<input type="text"/>	
Date added to the database	<input type="text"/>	
Sublocation	<input type="text"/>	
<input type="checkbox"/> Save settings		

OK
Cancel
Help
New record
Previous
Connect

From this form you may enter new bibliographic records, select an existing record, or search using Z39.50 to retrieve a bibliographic record.



Once a selection is made, you use the **Copy** option from the bibliographic display to put a copy of the bibliographic record in the potentials file.



217.5 Ordering process

This process creates orders from the selections in the potentials files. You have to be an authorised user in order to be allowed to choose this option (AFO 611 - Acquisitions (continued) - Create orders from selections in potential files).

When the Ordering process menu option is selected, the system processes through all the potential files looking for those files that either have outstanding selections or no selections at all. The information is displayed in a screen similar to the one below:

No	Id	Date loaded	Titles - no select	Titles to pr	Type	Default supplier	Process	Loc. - no selections	Selectors - no selector
1	za0_0339	15 Nov 2005	22:56 2/2	0	Import	NBD	No	*ALL*	*ALL*
2	za0_0339	15 Nov 2005	22:49 2/2	0	Import	NBD	No	*ALL*	*ALL*
3	bna_7	26 Oct 2005	15:41 4/4	0	Import	ACME	No	*ALL*	*ALL*
4	bna_4	19 Oct 2005	20:24 1/1	0	Import	ACME	No	*ALL*	*ALL*
5	za8_0339	19 Oct 2005	16:26 6/6	0	Import	NBD	No	*ALL*	*ALL*
6	bna_3	18 Oct 2005	20:03 6/6	0	Import	ACME	No	*ALL*	*ALL*
7	za8_0339	18 Oct 2005	19:10 8/8	0	Import	NBD	No	*ALL*	*ALL*
8	za8_0339	30 Sep 2005	15:05 3/3	0	Import	NBD	No	*ALL*	*ALL*
9	za8_0339	29 Sep 2005	21:22 2/2	0	Import	NBD	No	*ALL*	*ALL*
10	za8_0339	29 Sep 2005	20:45 1/1	0	Import	NBD	No	*ALL*	*ALL*
11	P00000017	31 May 2005	13:58 1/1	0	Manual	HEI	No	*ALL*	*ALL*
12	bna_2	14 Apr 2005	15:36 8/8	0	Import	ACME	No	*ALL*	*ALL*
13	P00000015	13 Apr 2005	20:20 1/1	0	Manual	CLARK	No	*ALL*	*ALL*
14	bna_1	13 Apr 2005	17:19 5/5	0	Import	ACME	No	*ALL*	*ALL*
15	a0_0446	07 Apr 2005	16:24 449/449	0	Import	NBD	No	*ALL*	*ALL*
16	P00000008	25 Feb 2005	15:00 4/4	0	Manual	CLARK	No	*ALL*	*ALL*
17	P00000007	25 Feb 2005	14:57 1/1	0	Import	NBD	No	*ALL*	*ALL*
18	P00000006	25 Feb 2005	14:48 1/1	0	Import	NBD	No	*ALL*	*ALL*
19	P00000005	25 Feb 2005	14:17 1/1	0	Import	NBD	No	*ALL*	*ALL*
20	P00000004	25 Feb 2005	14:16 1/1	0	Import	NBD	No	*ALL*	*ALL*
21	P00000003	25 Feb 2005	14:14 3/3	0	Import	NBD	No	*ALL*	*ALL*
22	P00000002	24 Feb 2005	22:24 1/1	0	Import	NBD	No	*ALL*	*ALL*
23	P00000001	24 Feb 2005	22:16 92/92	0	Import	ACME	No	*ALL*	*ALL*

Columns on the screen

The warning icon shows in the first column (1) if the file is missing the supplier or (2) has locations with no selections or (3) has selectors with no selections. The list of locations and selectors that the system checks are defined in AFO 272 – Potentials.

Id: shows the potentials file id

date loaded: the date the file was loaded

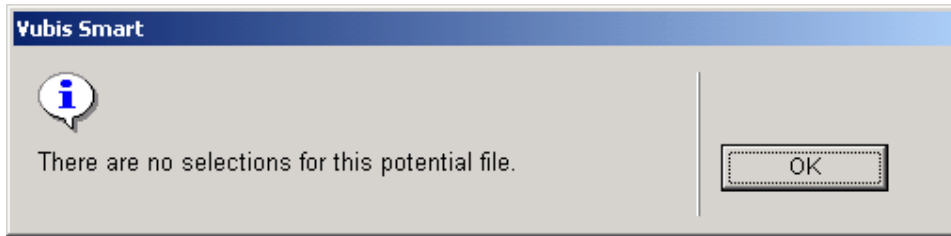
Titles – no selections: shows the number of titles with no selections/total titles in the file

Titles to process: shows the number of titles with selections to process

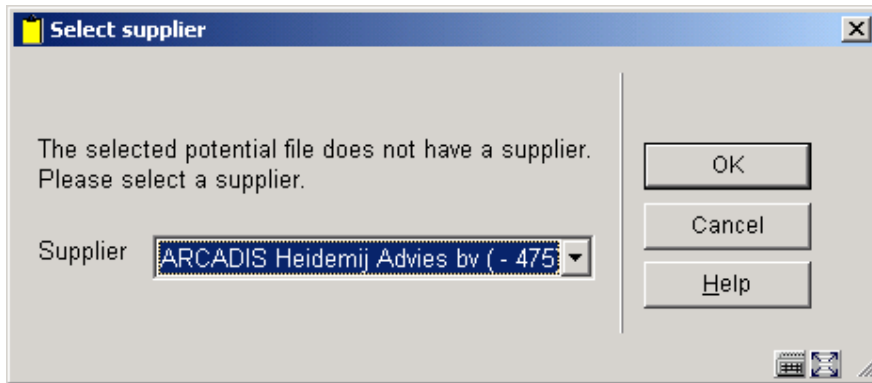
Type: shows the type of the potential file (Manual or Import)

Process: indicates whether you want to process this file when you choose the option to turn selections into orders. This flag works in conjunction with the “Process/Do not process” icon (this icon tries to toggle the flag). The system defaults this flag to “Y” with the following

exceptions: if there are no titles to process or if there is no supplier assigned to the potential file, the "Process flag" is automatically set to "N". If you attempt to toggle the flag for a file that has no titles to process you get the message:



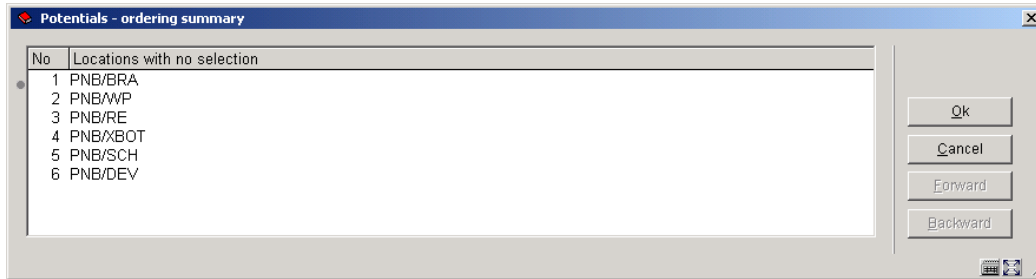
If you attempt to toggle the flag for a file that has no supplier assigned, the system will prompt you to enter the supplier:



Once you enter the supplier, the process flag is set to "Y". The system assigns this supplier to all the titles that currently do not have a supplier defined for that potentials file.

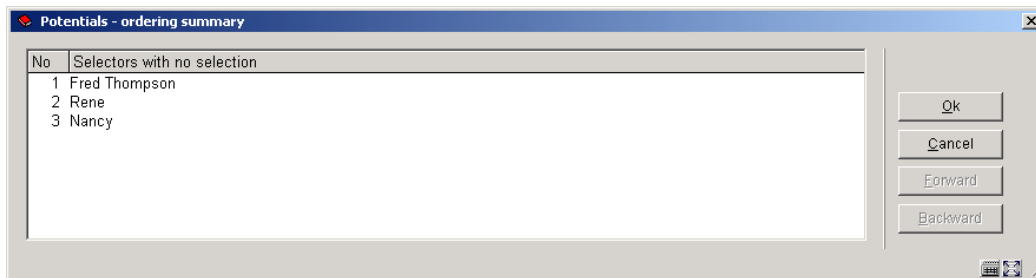
Loc. – no selections: The "Locations with no selections" column shows a list of locations (inst/loc) that have not made any selections in the potentials file. Only the locations defined in AFO 272 - Potentials are checked.

If no selections at all have been made, this field displays "*ALL*". If there are more than 5 locations in the list only the number of locations with no selections is displayed. In order to see the list of locations choose the icon "**Locations with no selections**". The system will display a form similar to:



Selectors with no selections: shows a list of selectors that have not made any selections in the file. Only the selectors defined in AFO 272 - Potentials are checked.

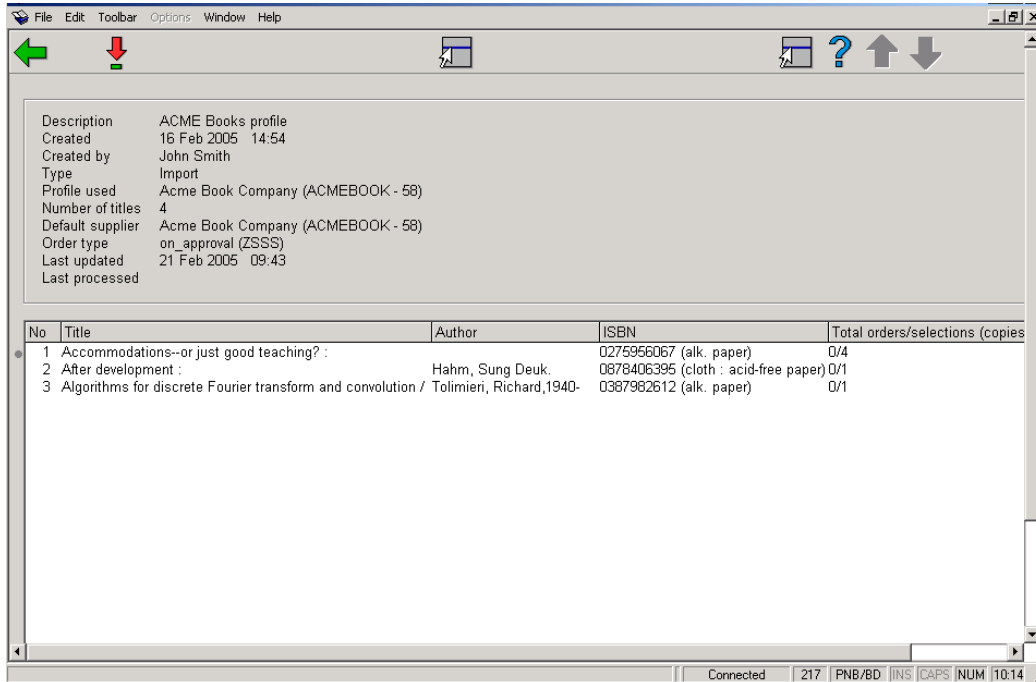
If no selections at all have been made, this field displays ***ALL***. If there are more than 5 selectors in the list only the number of selectors with no selections is displayed. In order to see the list of selectors choose the icon **"Selectors with no selections"**. The system will display a form similar to the one below:



The **"Create orders"** icon starts the process that turns the selections in the potentials files into real orders. See section 217.5.1.

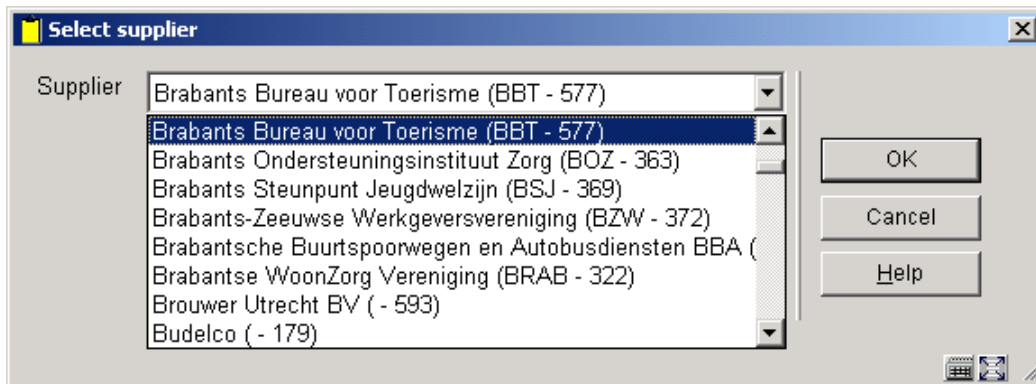
Other options on the screen

Select: displays a list of titles from the selected potentials file that have selections that need to be processed:

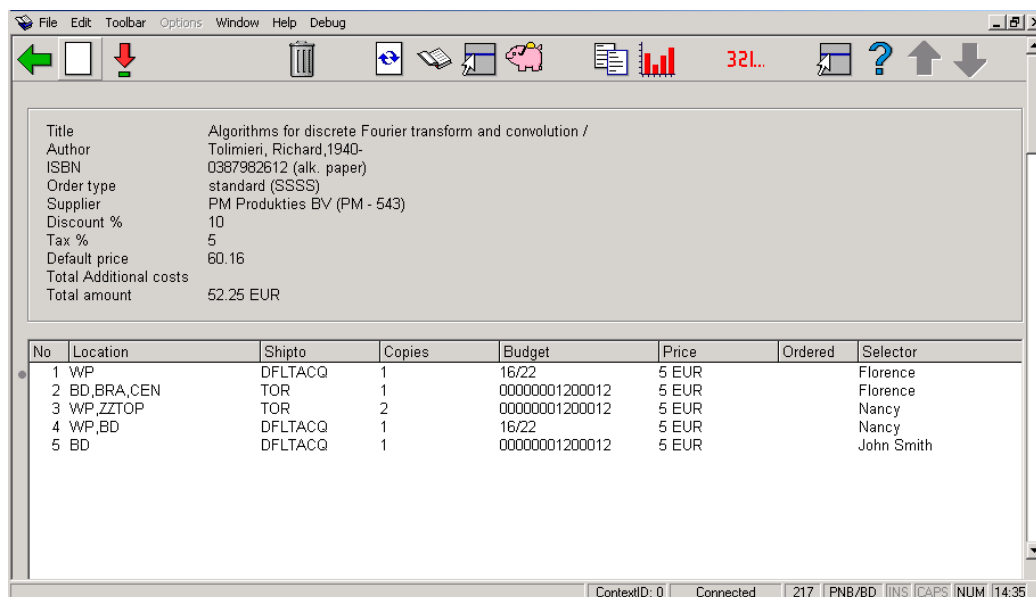


The “**Total orders/selections (copies)**” column is calculated by summing up the copies selected and ordered by all of the selectors on this title.

The “**Assign/change supplier**” icon gives you the ability to assign/change a supplier to a potential file. The ability to change supplier depends on the parameter settings from AFO 272 – Potentials:



The “**Select**” icon takes you to a screen that shows the details for a specific title. This screen is similar to the “Potentials file selection” from the “Selection process” (with the exception that here it shows the selections made by all the selectors and the icon “Turn selections into orders” is enabled):



All the functionality explained in “Potentials file selection” from the “Selection process” is valid here as well.

From this screen, you are able to add, update or delete selections made by any of the selectors.

If you choose the **Turn selections into orders** icon from this screen, the system will process only the selections on this title into an order.

217.5.1 Turn selections into orders

Selecting the “Create orders” icon starts the process that turns the selections in the potentials file into real orders. This process involves many steps but these steps are invisible to you, the user.

For each potentials file with Process flag equal to “Y”, the system determines which database to create bibliographic and order information in and which matching and merging profiles to use.

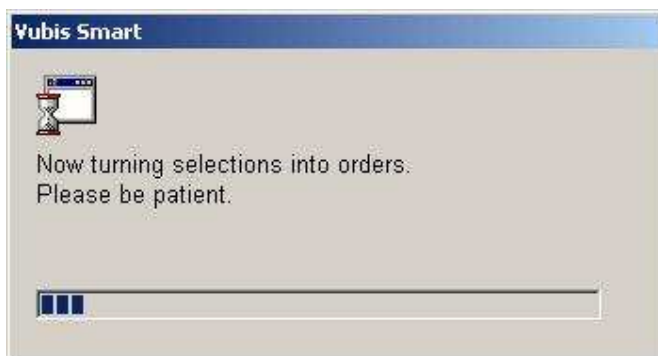
- For each title in a selected potentials file:
 - The bibliographic record is filed into the production database if not already there (defined in Potentials import file – Database to create orders in). Matching and merging is done based on the matching and merging profiles defined in the standard input/output profile defined in the Potentials import profile – Import profile. Within the standard input/output profile definition (AFO 133), you have the ability to specify the savelist for matched and the savelist for unmatched records. These savelists are updated as the titles are processed.

- An order record is created for each title and a partial order is created for each selection on the title.
- The dispatch flag in the order is set based on the supplier attached to the order.
- The status of the order is automatically set to 'Sent' based on the supplier.
- The order is automatically received if the Order type selected in the Potentials import profile is one that is set to have orders automatically received (i.e. Approvals).
- The selected amount for the title is subtracted from the total selection amount in the budgets and is added to the committed amount in the budget(s).
- The selections are marked as Ordered and the order number and order date are stored in the selections in the potential title record.
- The total amount selected is reset to zero in the potential title record.

Note

When selections are turned into orders, the system does *not* check the budget balance. This was already done when the selections were created, so it is not re-done at this stage.

Once the record in the potentials file has been ordered, the record points to a bibliographic record in the production database. It no longer points to a record in the background database.





After pressing **OK**, the system displays a text file containing a summary of the orders created by the process:

```
Order records loaded
Now turning selections into orders.
200300167/0001 - Faces of fire / Michael Jan Friedman - 0-671-74992-7
200300168/0001 - After development : - 0878406395 (clo
200300169/0001 - Scheurbuik / Annette de Vries - 9025419909
200300170/0001 - De Villa / Danielle Steel ; [vert. uit h - 9036421837
Potentials selections into orders load finished
```

The orders created by this process are now ready to be picked up by the standard 251/252/253 order printing processes (provided that the dispatch flag has been set to "Y" in the orders and that the orders were not set to 'sent' automatically).

- **Document control - Change History**

Version	Date	Change description	Author
1.0	unknown	creation	
2.0	November 2006	updates for release 2.4.2 build 1	