

AFO 211 – Purchase orders

211.1 Introduction

Please read the [introduction to the acquisitions module](#) for background information on various general principles for ordering.

The following conditions must be met before purchase orders can be input.

The following files must be defined:

- Suppliers: define via AFO 241 ('Suppliers')
- Currency codes: define via AFO 242 ('Exchange rate information')
- Budgets: define via AFO 243 ('Budgets')
- Destination codes: define via AFO 244 ('Destinations')
- Print locations: define via AFO 245 ('Locations')
- Country codes: define via AFO 246 ('Country codes')
- Requestors: optional, define via AFO 431 ('Borrower maintenance')
- Codes for notes fields: optional, define via AFO 247 ('Notification codes')

You also need to prepare for printing:

- Define the parameters via AFO 271 ('Print parameters control')
- Define the lay-out for the printouts via AFO 271

AFO 211 allows you to enter purchase orders that are linked to an existing or newly entered bibliographic record.

For entering purchase orders you must adhere to the following procedures.

Choose AFO 211, the system will display a search screen.

Now, there are two options:

- The title you wish to order exists already in the database. In this case you can link the (new) order information to the existing record. Use one of the available search methods to retrieve a bibliographic (or order) record. In case the order number is known, it can be searched from the system number tab:

Search for a record

Standard **System number** Z39.50

Enter system number

Select standard index

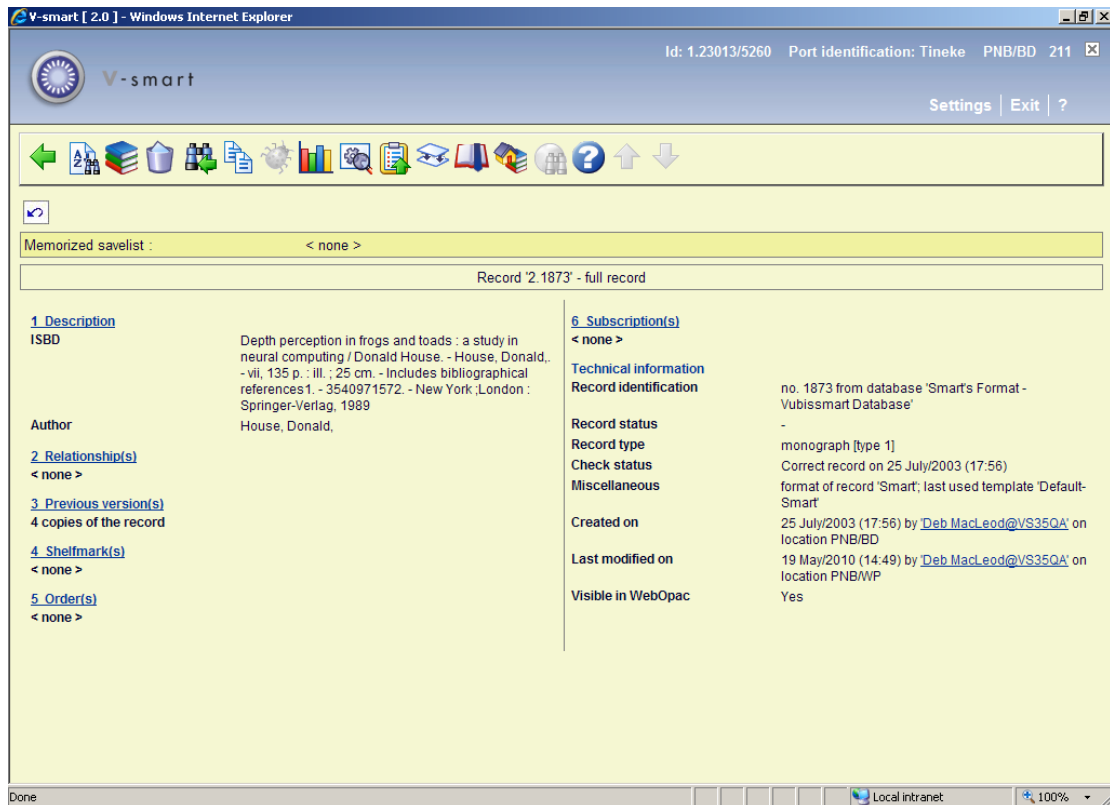
Select database

Save settings

OK
Cancel
Help
New record
Savelists
Previous
Connect
WebOpac

- The title you wish to order does not exist in the database. In that case you need to create a bibliographic record first. At the stage you can enter the minimum details, but you can also add a complete bibliographic record or copy one.

In both cases the system will then show you the overview screen for a bibliographic record. If you have entered a new bibliographic record there will be nothing linked to this record, but with existing bibliographic records it is possible that there are already orders linked to it.



Orders are linked to a bibliographic record. Under the heading “Order(s)” you will find the existing orders; if there are no orders you can click on the line “<none>” to add a new order. If there are orders already the number will be shown; again you can click on this line.

211.2 Purchase orders

An order can be linked to one bibliographic record (use AFO 211) or to more (use AFO 216) and is sent to one vendor. More than one order can be linked to a bibliographic record. For invoicing purposes the vendor can be changed in certain circumstances after the order has been sent. For instance, when an item ordered from vendor A is invoiced and supplied by vendor B; e.g. central library and branch library.

A purchase order can comprise several items (or volumes) which can be charged to one or more base funds. For this reason an order is made up of two sections, i.e.:

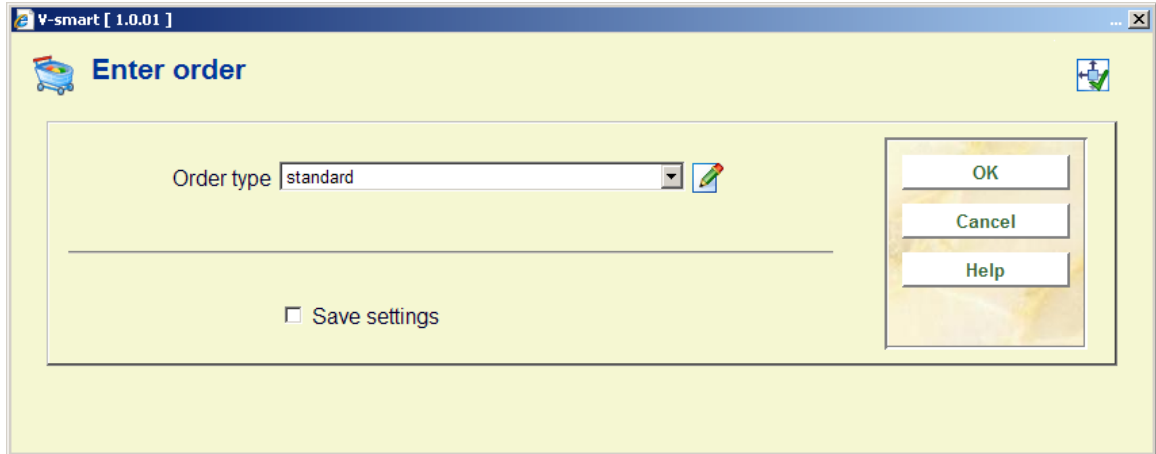
- The general details such as the link to the bibliographic record, the vendor, the total number of copies and the total committed price
- Details of one or more sub purchase orders. These include the base fund and the destination location

The material ordered in a sub purchase order is grouped by requester and base fund

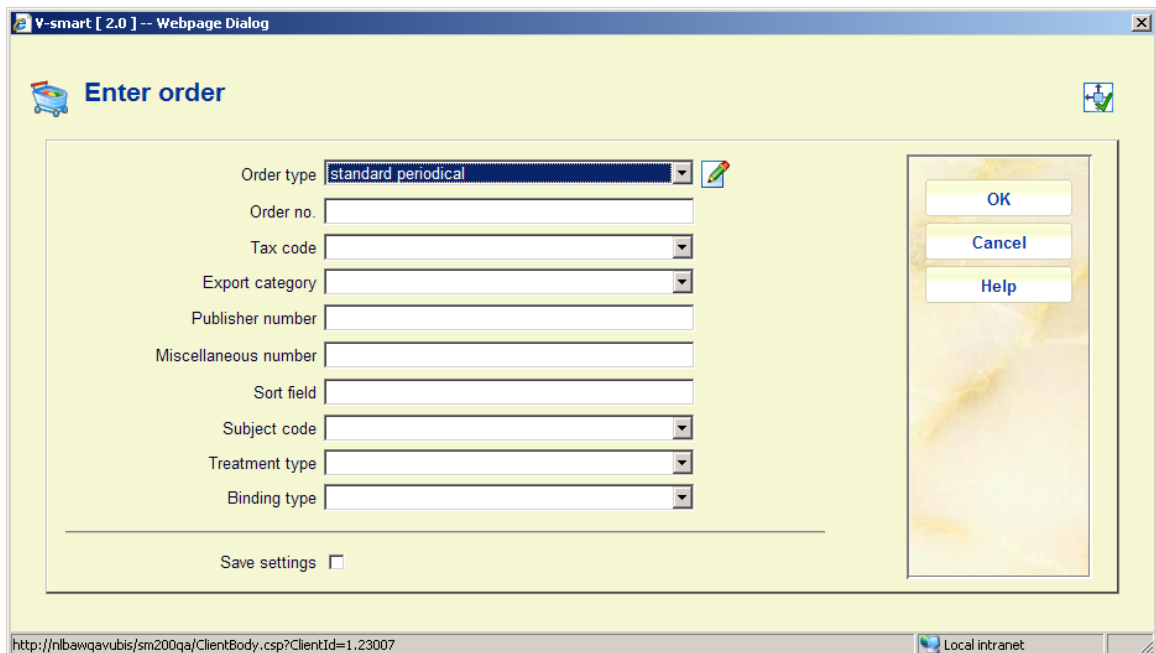
This two section structure enables, for example, an order to have two items for location A on base fund X and three items for location B on base fund Y. This is an order for five items on the order slip or list for the vendor.

211.2.1 Order types

When adding a new order, the system first prompts you for an order type:



Depending on settings in AFO 272 – Additional order fields, this input form may also contain other fields (either free text or authority controlled). See the Help for AFO 272 for more information



Note

The field **Binding type** is associated with a corresponding field in the supplier record. If you select a binding type here and then on the next screen (see section 211.3) select a supplier that is not marked for the selected binding type, an error message will be displayed. After acknowledging this error message, you will either have to search for supplier that is marked for the selected binding type or cancel creating the order.

If you use a dropdown list for suppliers, this list will only contain names of suppliers who are marked for the selected binding type.

The system uses four criteria for determining the type of order:

Criterion	Code	Description
1 (acquisition)	S	Standard acquisition
	R	Regularized - An item is purchased and usually paid for before being passed on to the acquisitions department for processing, unlike the other order types.
	G	Donation - The code originates from the Dutch: Gift)
	Z	On approval (the code originates from the Dutch: Zichtzending)
2 (destination location)	S	Standard destination location
	E	External services (i.e. the library orders items for a non-library location which may or may not be part of the agency)
3 (material)	S	Standard type of material
	T	Serial (the code originates from the Dutch: Tijdschrift)
	V	Subsequent issue (the code originates from the Dutch: Vervolgwerk)
4 (time)	S	Standard

R Retro (use for purchase orders made before the acquisitions module was introduced)

Note!

The code 'S' (Standard) is used in all four criteria for the most common types of orders which do not fit into any of the other categories.

The codes in the table above can be combined to produce 48 order types.

Example

SSSS - standard purchase order

GSTS - donation of a serial

SESS - standard order for another agency

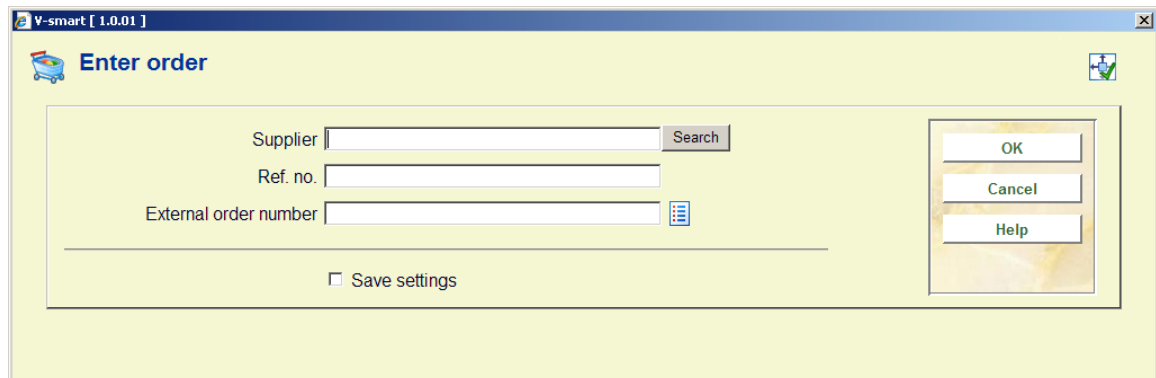
When the system is installed SSSS is defined as the default type. This can be changed with the help of a parameter in AFO 272 ('Other parameters control').

211.2.2 Order numbers The system automatically assigns an internal order number to each order. The format of this order number is determined through AFO 272 – 'Order number format'. See the description of this AFO for more details. It is also possible to enter order numbers manually. This is controlled through AFO 272 – 'Miscellaneous'. See the description of this AFO for more details. A manually entered order number must be unique within the meta institution. If you use a mixture of automatic and manual order numbers, the system will apply any separator and length defined for automatic order numbers also to manual order numbers. E.g. if the separator is '-' and the length 5 for a prefix of 2009 the system will generate an automatic order number of 2009-12345. A manually entered order number of 2009AXAXAX will then be displayed as 2009-AXAXA-X (a dash after the prefix and after 5 characters).

This number can be used on the search screen in AFO 111/211 to retrieve bibliographic records.

211.3 Order entry

After choosing the order type (and possibly entering an order number) an input screen is displayed:



The screenshot shows a software window titled "V-smart [1.0.01]" with a sub-window titled "Enter order". The "Enter order" window has a light yellow background and contains the following elements:

- Supplier: A text input field followed by a "Search" button.
- Ref. no.: A text input field.
- External order number: A text input field followed by a list icon.
- Save settings: A checkbox.
- Buttons: A vertical stack of "OK", "Cancel", and "Help" buttons on the right side.

Fields on the screen

Supplier: Enter the supplier code or number or enter (part of) the name and click on the 'Search' button to retrieve the supplier.

Notes

A supplier must be defined in AFO 241 before name or code can be used here. When entering the supplier you can also use the 'M' option (Memorize) to retrieve the last used supplier record.

Depending on the setting of the parameter "Maximum number of suppliers to show in dropdown list" in AFO 272 - Miscellaneous, supplier names may also be shown in a dropdown list from which you can select one.

Ref. no: Enter a reference number. There are no checks performed on entry in this field. This reference number can then be printed on any correspondence with the supplier (e.g. order forms, reminders, etc.).

The reference can be a number or any other data.

External order number: optional field for manual entry of an external order number.

Next the input screen for the first partial order is shown:

Fields on this screen

Distribution list: Distribution lists can be used to create multiple partial orders. The library can define distribution lists for recurrent ordering steps. In a centralized environment an order for a bestseller can always be created according to the following pattern:

Location	Quantity
BD	5
CEN	8
NOR	3
EAST	2
WEST	7

The library can define distribution lists comprised of multiple distribution lines. Each line consists of location, ship to code, budget and quantity. During the ordering process you can select a distribution list so you do not need to enter the majority of order information.

Destination code: Select a code from the dropdown list.

The system will only show codes as defined in AFO 244 ('Destination codes'). This does not apply to external orders. When creating an external order you can only enter a destination code that has *not* been defined in AFO 244.

One destination code can be linked to multiple locations, which allows you to order copies for multiple locations in one partial order. Read the description of AFO 244 for more information on destination codes.

Shipto code: A shipto code can be added to each partial order. This code determines to which address the ordered materials must be shipped. If no code is entered the default code set for the institution of the location will be used.

Budget: Select a budget from the dropdown list. Only codes defined in AFO 243 ('Budgets') can be selected.

Selection code: Optionally you can enter a code here for use with SSP. The codes are not relevant for the ordering process and are not checked by the system.

Material type: Here you can select a material type for the on order item which can be used with further processing of the item (e.g. place reservations on on-order titles).

Please note

There can be restrictions on the material types that can be ordered. This can be because of user restrictions (as defined in AFO 277) and / or because of restrictions in the supplier record (as defined in AFO 241).

Circulating stock category: With this option you can link an on-order item to a circulating stock collection. These categories are defined in AFO 469.

Quantity: Enter the quantity for the **destination code**. The default is 1 (one). If the number of copies for each location is different you must create separate partial orders.

In case the same number is to be ordered for each location you can use a destination code that comprises all locations. See above.

Unit price: Enter the unit price. Enter either the price as quoted by the supplier or an estimated price. For the total price this amount will be multiplied by the quantity and by the destination code. For a price in other than the base currency enter a space and the currency code after the amount. This currency code must be defined in AFO 242 ('Exchange rate information').

Example

70 EUR

When entering the price the following options are also possible:

- Do not enter a price for the first partial order. No amount will be committed to the selected budget.
When you do not enter a price for any subsequent partial orders, the price will be taken from the first partial order.
- Enter the code 'V' (from the Dutch 'verplichting' = commitment). The system then assumes that there already is a commitment for this order made via AFO 243 ('Budgets')
The V-option can be relevant for the registration of serial orders for which a fixed amount is entered as commitment at the start of the financial year. The use of this options has consequences for invoice registration. See below in section 211.3.3 as well as the help for AFO 243 ('Budgets').
- Enter the code 'I' immediately after the price (including VAT). This denotes the price includes VAT. The system assumes that normally a price is excluding VAT.
This code is only relevant if you have chosen bookkeeping model 33, the so-called 'invoicing model'.
- Enter the code 'T' immediately after the price (total price). This denotes that the price applies to the total order. This can only be done for orders for a record other than type 1.
When you enter a T after the price in the Unit price field, the system will divide the price specified by the number of volumes in the specification field to determine a new unit price. i.e. if you put 1-3 in the specification field (ordering 3 volumes) and a price of 10T, the system calculates a new unit price of 3.33.
- Enter the code 'K' (from the Dutch 'korting' = discount) immediately after the price. This denotes that a discount of the specified percentage is applicable. This discount does not depend on what is defined (Individual or Global) in the supplier record.

Example:

Unit price: 80IK15 EUR

A price of 80 Euro, inclusive VAT and 15% discount.

Note:

Currency codes must be defined in AFO 242 ('Exchange rate information').

Name: The system offers the option to link a name to a (partial) order. E.g. the name of the person who asked the library to order this item. The name must appear in the borrower file. Enter (part of) the name and click on the 'Search' button to retrieve a borrower.

Depending on settings in AFO 272 – Miscellaneous, this input form may also contain the field **Shelfmark**. See the Help for AFO 272 for more information.

The screenshot shows a web browser window titled "V-smart [2.0.01]" displaying a form titled "ENTER PARTIAL ORDER NO. 1". The form contains the following fields and controls:

- Instruction:** "If you select a distribution list then any entries in the fields Destination code, Shipto code, Budget and Quantity will be ignored."
- Distribution list:** A dropdown menu.
- Destination code:** A text input field containing "BD" with a search icon.
- Shipto code:** A text input field containing "DFLTACQ" with a search icon.
- Budget:** A text input field containing "2800.6 - BDK boeken" with a search icon.
- Selection code:** An empty text input field.
- Shelfmark:** An empty text input field.
- Material type:** A dropdown menu containing "Books (BO)" with a list icon.
- Circulating stock category:** A dropdown menu.
- Quantity:** A text input field containing "1".
- Unit price:** A text input field containing "5".
- Name:** An empty text input field with a search icon.
- Save settings:** A checkbox that is currently unchecked.
- Buttons:** A vertical stack of buttons on the right side: "OK", "Cancel", "Help", "Update DistL", and "Details".

The browser's address bar shows the URL: <http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23009> and the page is viewed on a "Local intranet".

Depending on settings in AFO 272 – Miscellaneous, this input form may also contain the button **Details**, which will take you to an entry form for additional item information. See the Help for AFO 272 for more information.

Detailed information for partial order

Location code: BD - BD

Shelfmark classification: []

Shelfmark algorithm: []

Copy number: []

Cost: 5

Impression: []

Item data: []

Attachment: []

Item Category: 01 (MISC)

Number of parts: []

Permission slip:

Product category: []

Statistical category: []

Circulating Stock: []

Inventory number: []

Use settings on subsequent partial orders:

Buttons: OK, Cancel, Help, Update all

URL: http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23009

Local intranet

The fields shown here are partly dependant on parameter settings in AFO 469 – Item Management Parameters – Data to be entered in Acquisitions. The field **Use settings on subsequent partial orders** allows the user to define these only once. If this option is checked, then the data entered here will be automatically added to partial orders created in the same session for that order line. The button **Update All** may be used to update ALL partial orders with the current data.

Note

Location code This field is always “greyed” out; the contents of this field are defined by the partial order and are therefore protected.

Sublocation This is NOT offered. A given partial order may cater for more than one location (as defined by the “destination code”) - because sublocations are location specific, it is NOT possible to pre-assign a sublocation.

It is possible that the shelfmark is “split” into several pieces – i.e. prefix, main classification, cutter and suffix. If a shelfmark is entered on the previous screen, then this is carried across into the “main classification” field; however if this is subsequently rekeyed into separate pieces, then this split is maintained.

For printing, the “shelfmark” is taken to be the 4 (possible) elements separated by spaces.

On first entry to the details screen, the item category is determined by the material type. There is however no one-to-one correspondence, so once an item category is defined then subsequent amendments to either the item category or the material type in the partial order are not kept in synch.

Similar ideas apply to the item price – by default this is taken from the price in the partial order, but once entered, then the item price in the “details” is not kept in synch with the order price – these two are not necessarily quite the same thing.

After entering all the details click on the ‘OK’ button. An entry form for the next partial order appears. Clicking the ‘Cancel’ button will stop the entry process. After that an overview screen of the order is displayed.

The screenshot shows a web browser window titled "V-smart [2.0] - Windows Internet Explorer". The page displays order details for "ORDER 2010-00171/0001 (2.1125) - Order in the quarter". The interface includes a navigation bar with icons and a main content area with a table of order details.

General data		
<input type="checkbox"/>	1 Order type	standard (SSSS)
<input type="checkbox"/>	2 General data	Supplier Heinen (1)
	Delivery type	N
	Dispatch	Y
	Ref. no.	-
	Invoice	-
	Donor	-
	External number	-
	Riskseller	-
	Control number	-
	Exported	-
	Export category	-
	Rec/Can export blocked	-
<input type="checkbox"/>	3 Order information	Specification 1 c.
	Status	-
<input type="checkbox"/>	4 Financial data	Total 5 EUR
	Source	-
	Additional costs	0
	Commitment	4.62 EUR
	Individual discount %	7.5
	Total price	-
	Individual tax (%)	0
	Taxcode	-
<input type="checkbox"/>	5 Internal notes	-
<input type="checkbox"/>	6 Supplier notes	-
<input type="checkbox"/>	7 Order status	Entered : 22/06/2010
<input type="checkbox"/>	8 Receipt status	Not: -
<input type="checkbox"/>	9 Invoice status	Not: -
<input type="checkbox"/>	10 Claim 1 status	Not: 22/07/2010
<input type="checkbox"/>	11 Claim 2 status	Not: 31/08/2010
<input type="checkbox"/>	12 Cancellation status	Not: 20/09/2010
Partial order		
<input type="checkbox"/>	13 Destination	1/1
	Location(s)	BD
	Budget	2800.6
	Selection code	-
	Subscription number	-
	Location(s)	-
	Budget	-
	Shipto Code	DFLTACQ
	Material type	BO
	Circulating stock category	-
<input type="checkbox"/>	14 Order data	Specification -
	Quantity	1
	Price	5
<input type="checkbox"/>	15 Requester	Name -
	Notification	N
	Reservation	N

The following statuses are possible:

- 7 Order status: entered, locked (is added to print file), sent. From the moment the order has been sent the claims mechanism kicks into action.
- 8 Receipt status: not, partial (of two partial orders only one was received; not all copies have been received), total. If a line was deleted this will be shown in brackets at the end of the field.
- 9. Invoice status: not, partial (of two partial orders only one was invoiced; not all copies have been invoiced), total
- 10, 11,12. Claim 1, 2, cancellation status: not, partial (of two partial orders only one was received; not all copies have been received), total

If you want to print an order you need to make sure the option Dispatch is set to Yes.

You can print the order directly using the 'Print' option; but if you want to generate lists by supplier you must use AFO's 251, 252, 253.

211.3.1 Overview screen On the overview screen the following options are available:

New partial order: only available on an order that has not yet been printed.

Select no. (+): select a line and then this option to look at more details of that line. Not all fields will be available, depending on which line you choose as well as on the status of the order. See section 211.3.2 for details.

Current supplier: this option takes you to the AFO 241 screen of the current supplier, where you can update supplier information. See the help of AFO 241 for more information.

Print: to (re)print the order.

Bibliographic record: when you select this option, the bibliographic record will be displayed in read-only mode.

Choose partial order: when there is more than 1 partial order, this option can be used to switch to the details of another. See section 211.3.3.

Delete partial order: only available on an order that has not yet been printed.

Global registration: with this option price and invoice number can be entered on an input screen and then be used on the receiving screen (only if receiving has not yet been completed).

Receipt with barcode: this will switch to the AFO 222 screen. See the help on that AFO for more details.

Invoice summary: only available if an invoice number has been registered for this order.

Budgets: this will switch to a screen with budget details.

Price: with this option the price can be entered on an input screen and then be used on the receiving screen (only if price information has not yet been entered).

Undo action (+): choose a line and then this option to undo the action. Not available for all actions.

Technical status: this will display a brief overview screen of when and by whom the order was created and modified.

AFO: this option will take you back to the search screen.

Display order header: this will switch to the display of the order header information.

Parent/child: This option is only available for standing orders. See section 211.4 for details.

Renewal: This option is only available for serial subscriptions. See section 211.5 for details.

211.3.2 Adding other information By selecting one of the line numbers on the overview screen, you can add or modify information in the corresponding fields. Below is an explanation of some of the sections and fields.

The field **Order type** is not updatable.

211.3.2.1 General data This section contains the Supplier name and various additional order fields (if applicable). Depending on the status of the order, not all of the information may be updatable.

Two fields are related to the output of notices to suppliers:

Delivery type: Denotes the type of purchase order sent. The system automatically enters a default value in this subfield (N). The following values are possible:

- 'N' normal sending
- 'S' rush sending (the code originates from the Dutch: Spoed)
- 'E' express sending.

You can change the default type. With the help of this option you can send the various types of purchase orders at different times, for example, once a week for 'normal' orders, every day for 'rush' orders. You can define a different layout for each type (see the help of AFO 271).

Dispatch: Indicates whether a purchase order may be sent. 'Yes' is the default status. It may be 'No' because:

- the status has been manually defined as 'N' because you do not want to send the purchase order yet;
- the supplier gives a discount if more than a certain amount is spent at one time. This discount is defined in AFO 241 for the supplier.

Donor: This field is only displayed for donations (GSSS). You can enter the name of the donor or input a code (defined in AFO 248 Donation codes).

Bookseller: This field is only used for regularized order types (RSSS) You can enter the name or reference of the bookstore, or input a code (defined in AFO 248 Donation codes). Regularized orders are used for items that are purchased by third parties and passed to the library for processing in Acquisitions.

211.3.2.2 Financial data After choosing line 4 an input form for additional financial data is shown:

V-smart [1.0.01]

Additional costs

Source

Individual discount %

Individual tax %

Tax code

OK

Cancel

Help

Enter data as appropriate and click **OK**.

211.3.2.3 Notes After selecting line 5 or 6 you will be taken to an overview screen on which previous notes may be listed:

V-smart [1.0.01] - Windows Internet Explorer

V-smart

Id: 1.20014/1520 User: tineke Location: PNB/BD AFO: 211

Settings Exit

Order messages

No	Code	Date	Message	Status
1	AN1	30/06/2008	out of stock	REQUESTER TO BE NOTIFIED

Options on the screen

New message: use this option to add a new message. See below for more information.

Modify message: select a line and then this option to modify the details. See below for more information.

Delete message: select a line and then this option to delete it. The system will prompt for confirmation.

Message= cancellation, Message=inactive, Message=notification or Message=receipt: select a line and then use these options to change the status of the message.

After selecting the **New message** or **Modify message** option, an input form will be displayed:

The screenshot shows a window titled "V-smart [1.0.01]" with a sub-header "New order message". The form contains the following elements:

- Notification code:** A dropdown menu.
- Message:** A large text area for free text entry.
- Reference number:** A text input field.
- Change of ISBN:** A text input field.
- Change of supplier:** A text input field.
- Estimated delivery date:** A text input field.
- Notify requester on receipt:** Radio buttons for "Use default for code", "Yes", and "No".
- Cancellation by supplier:** Radio buttons for "Use default for code", "Yes", and "No".
- Status:** Radio buttons for "Inactive" and "Active".
- Buttons:** "OK", "Cancel", and "Help" buttons on the right side.

Fields on the screen

Notification code: choose a notification code from the dropdown list. These codes are defined in AFO 247. Codes can be used to facilitate easy entry, because the system will automatically retrieve the standard text associated with the code.

Message: alternatively you can enter your own message as free text instead of using a code.

Reference number, Change of ISBN, Change of supplier and Estimated delivery date: optionally enter additional information in any of these fields.

Notify requestor on receipt: check whether or not the requestor must be notified on receipt. If you check 'Use default for code' the system will take the setting as defined in AFO 247.

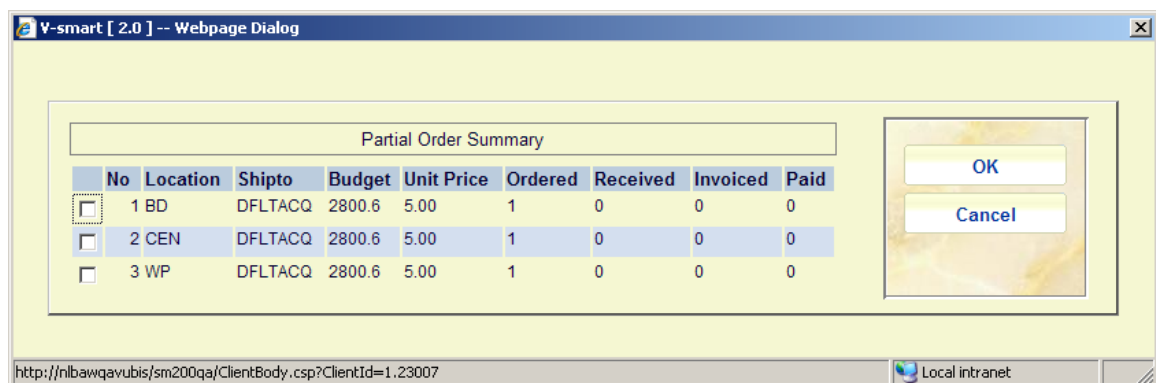
Cancellation by supplier: check whether or not this message means the supplier has cancelled the order. If you check 'Use default for code' the system will take the setting as defined in AFO 247.

Status: check whether or not the message is active.

211.3.3 Partial order lines Lines 13, 14 and 15 are related to partial order lines. In case of more than one partial order, the system will display how many there are. Partial orders are sorted alphabetically by destination location code.

Partial order	1/3
13 Destination	Location(s)

You can use the option **Choose partial order** to switch to the details of another. A selection screen will be displayed:



Select another partial order to display.

When the order has not yet been printed, selecting line 13 **Destination** or 14 **Order data** will result in display of the partial order entry form (see above).

When the order has been printed, selecting line 13 **Destination** will result in display of the partial order entry form, without the order data fields. Selecting line 14 **Order data** will only result in the option to add a Note, the Order data themselves can no longer be updated.

Selecting line 15 **Requester** will result in an input form being displayed:

V-smart [2.0] -- Webpage Dialog

Modify data for partial order

Name

Notification

Reservation

http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23007 Local intranet

Name: Name of the borrower (as defined in AFO 423).

Notification: Indicates whether a notification notice is sent.

Reservation: Indicates whether a reservation notice is sent.

211.3.4 Non-monograph orders When an order is created for a non-monograph record types (i.e. any type but 1) OR when you select an order type related to serials or series, the Specification field appears on the Partial order form. If this field is not filled in, no commitment is done.

ENTER PARTIAL ORDER NO. 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

Destination code

Shipto code

Budget

Selection code

Material type

Circulating stock category

Specification

Quantity

Unit price

Name

Save settings

OK
Cancel
Help
Update DistL

http://ontwikkeling/sm100devcentral/ClientBody.csp?ClientId=1.20003 Local intranet

1. if you are ordering subscription(s) of a serial, put a 1 in the Specification field of the Partial order. This will calculate commitment as it would if you were ordering monographs. i.e. basically number of copies*unit price.

2. if you are ordering multivolumes, there are two options:

- a) you can enter the unit price for the entire set in the Unit price field and enter 1 in the specification field of the partial order. This will again calculate commitment as it would if you were ordering monographs. i.e. basically number of copies*unit price
- b) you can enter the unit price of each volume in the Unit price field and then enter something similar to 1-3 (ordering volumes 1, 2 and 3) or 1-2;5 (ordering volumes 1,2 and 5) in the Specification field of the partial order. This will calculate commitment as number of copies * unit price * number of volumes. In this case, you will find that the Receiving screen will have an entry for each volume that you ordered.

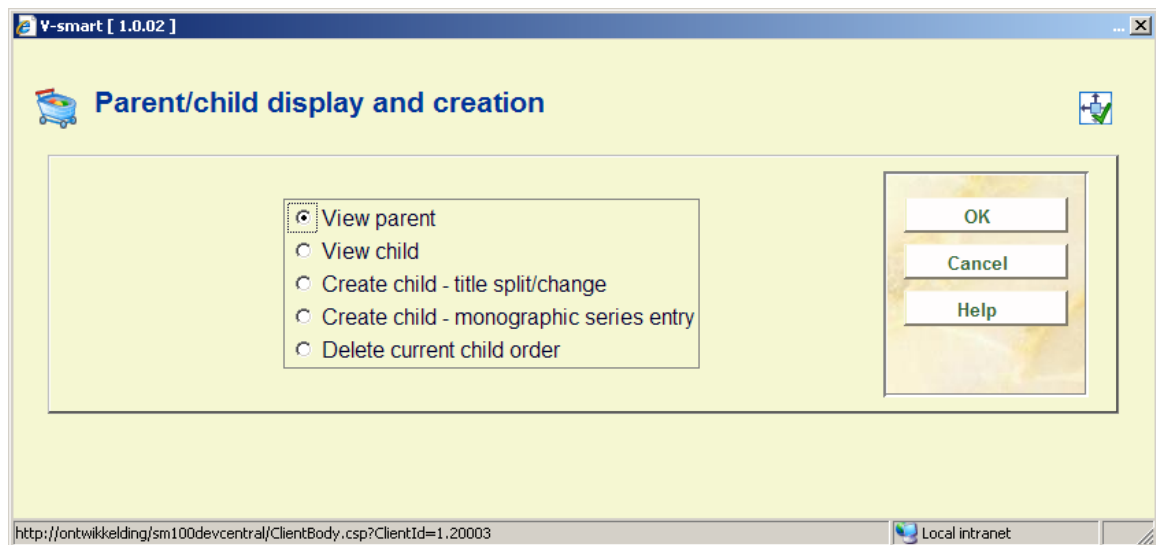
When you need to amend this information later please make sure you update the Specification field in the Partial order (group 14 on the Order detail screen), not the Specification field in the Order information group (group 3).

211.4 Standing orders

Multiple bibliographic records (“child” items) may be added to a single order (“parent” item) in order to handle memberships, serial title splits and changes, monographic series, standing orders, and so on. Staff add this information from Ordering, and can update it in Receiving or Ordering. The order number associated with a child order is the same as that of the parent – only the bib record will be different. Staff may receive, return, and claim copies of the child items separately, and may invoice them separately too.

See the [introduction to the acquisitions module](#) for background information.

Parent/child: This option is only available for standing orders. After you choose this option a selection form will be displayed:



The options are:

- view parent.
 - If the current record is not a child, the system displays a message, “the current order does not have a parent”.
 - If the current record is a child, the system leaves the current order/bib and comes back into the order detail screen of the parent record.
- view child.
 - If the current record does not have child entries, the system displays a message, “the current order has no child records”.

- If the current record does have child entries, the system displays a screen containing a list of all of the parent's children. If one of the displayed children is selected, the system leaves the current order/bib and comes back into the order detail screen of the selected child record.

- create child – title split/change.
 - If the current record is a monographic series entry, you cannot create a child record.

 - Otherwise, the system leaves the current order/bib and presents the bibliographic search screen. Search and retrieve a bibliographic record. When the Order summary screen is displayed and New is selected or when the Orders section is selected from the Full record display (and there are no orders), the system automatically creates a child record on the new bibliographic record. The order number of the new record is the same as that of the parent – the only thing that changes is the bibliographic record number. The current child order's status is set to "title split". The parent order's status is updated to include "main with title split".

- create child - monographic series entry.
 - If the current record is a monographic series entry, you cannot create a child record.

 - Otherwise, the system leaves the current order/bib and presents the bibliographic search screen. Search and retrieve a bibliographic record. When the Order summary screen is displayed and New is selected or when the Orders section is selected from the Full record display (and there are no orders), the system automatically creates a child record on the new bibliographic record. The order number of the new record is the same as that of the parent – the only thing that changes is the bibliographic record number. The current record's status is set to "series entry". The parent record's status is updated to include "main with series entry".

- delete current child
 - use this option to delete the current child record. All receipts and invoicing information must be deleted from the record prior to using this option.

211.4.1 Parent order

If the record you are currently displaying is a parent record, you cannot undo the Order status until all child entries have been removed from the parent.

A parent record must already be 'on order' (i.e. sent to the supplier) before you can start to add child entries to it.

The screenshot shows the V-smart web application interface. The browser title is 'V-smart [2.0] - Windows Internet Explorer'. The page header includes 'Id: 1.23013/5260 Port identification: Tineke PNB/BD 211' and navigation links 'Settings | Exit | ?'. The main content area displays order details for 'Star Trek Voyager / Rick Birman, Michael Piller, Jeri Tay...' with the order number 'ORDER 2010-00161/0001 (2.6) - Star Trek Voyager'.

The data is organized into sections with expandable/collapsible options (checkboxes):

- General data**
 - 1 Order type: standard series (SSVS)
 - 2 General data
 - Supplier: Heinen (1)
 - Delivery type: N
 - Dispatch: Y
 - Ref. no.: -
 - Invoice: -
 - Donor: -
 - External number: -
 - Rockseller: -
 - Control number: -
 - Exported: -
 - Export category: -
 - Rec/Can export blocked: -
 - 3 Order information: Specification: 1 c
 - 4 Financial data
 - Status: -
 - Total: 50 EUR
 - Source: -
 - Additional costs: 0
 - Commitment: 46.25 EUR
 - Individual discount %: 7.5
 - Total price: -
 - Individual tax (%): 0
 - Taxcode: -
 - 5 Internal notes: -
 - 6 Supplier notes: -
 - 7 Order status: Sent : 07/06/2010
 - 8 Receipt status: Not: -
 - 9 Invoice status: Not: -
 - 10 Claim 1 status: Not : 07/07/2010
 - 11 Claim 2 status: Not : 16/08/2010
 - 12 Cancellation status: Not : 05/09/2010
- Partial order**
 - 13 Destination: 1/1
 - Location(s): BD
 - Budget: 2800.6
 - Selection code: -
 - Subscription number: -
 - Location(s): -
 - Budget: -
 - Shipto Code: DFLTACQ
 - Material type: BO
 - Circulating stock category: -
 - 14 Order data: Specification: -
 - Quantity: 1
 - Price: 50
 - 15 Requester: Name: -
 - Notification: N
 - Reservation: N

Note

A record can have multiple of these statuses, in which case they are separated by a comma:

2 General data	Supplier	Heinen (1)
	Delivery type	N
	Dispatch	Y
	Ref. no.	-
	Invoice	-
	Donor	-
	External number	-
	Bookseller	-
	Control number	-
	Exported	-
	Export category	-
	Rec/Can export blocked	-
	Status	main with title split; main with series entry

After you have checked the option View child on the selection form, a summary screen will be displayed:

The screenshot shows the V-smart application interface in a Windows Internet Explorer browser window. The title bar reads 'V-smart [1.0.02] - Windows Internet Explorer'. The main header area includes the V-smart logo, the text 'V-smart', and user information: 'Id: 1.20003/5612 User: tineke Location: PNB/BD AFO: 211'. There are 'Exit' and 'Settings' buttons. Below the header is a navigation bar with a green left arrow, a question mark, and up/down arrows. A small icon is visible on the left. The main content area is titled 'Child summary' and contains a table with the following data:

No	Title	Status
<input type="checkbox"/>	1 Star Trek Voyagers [VIDEO] ; ; no. 1.5	title split
<input type="checkbox"/>	2 Star child / James P Hogan -- HoganJames P.	series entry

The browser status bar at the bottom shows 'Done', 'Local intranet', and '100%' zoom.

From this screen you can select an order to view its details.

When viewing the summary of the partial order when it is a parent/child relationship, the total number of copies received / invoiced etc are from the total of the children. The receipt/invoice status on the parent order will always be 'Partially':

V-smart [1.0.02]

Partial Order Summary

No	Location	Shipto	Budget	Unit Price	Ordered	Received	Invoiced	Paid
<input type="checkbox"/>	1	BD	2800.6	5.00	1	2	2	0


OK
Cancel

http://ontwikwelding/sm100devcentral/ClientBody.csp?ClientId=1.20003 Local intranet

3	Order information	Status	main with title split; main with series entry
		Specification	1 c.
		Status	-
4	Financial data	Total	5 EUR
		Source	-
		Additional costs	0
		Commitment	4.62 EUR
		Individual discount %	7.5
		Total price	-
		Individual tax (%)	0
		Taxcode	-
5	Internal notes		-
6	Supplier notes		-
7	Order status		Sent : 22/12/2008
8	Receipt status		Partially : 22/12/2008
9	Invoice status		Partially : 22/12/2008

211.4.2 Create child orders

After you have checked the option Create child for either title split change or monographic series entry on the selection form for a parent record, a bibliographic search form will be presented:


 **Search for a child record**


Standard System number


Search expression


Select search method Find Browse

Select user index

Language 

Location 

Material type 

Bibliographic type 

Calendar date (YYYYMMDD)

Save settings

OK
Cancel
Help
Previous
New record

You can either perform a search or click the button **New record**. In the latter case you will have to go through the normal steps for creating a bibliographic record.

After retrieving an existing record or saving a new record go to the Orders section and add a new order. This will NOT take you through the normal steps for placing an order. Instead you will be taken to the detail screen of the order that was created automatically. Various pieces of information have defaulted from the parent order:

The screenshot shows the V-smart 2.0 web application interface. The browser title is 'V-smart [2.0] - Windows Internet Explorer'. The page header includes 'Id: 1.23013/5260', 'Port identification: Tineke', and 'PNB/BD 211'. The main content area displays the order details for 'ORDER 200900009/0001 (2.6) - Star Trek Voyager'. The order is categorized as 'General data' and 'Partial order'. The status is 'title split'.

General data		
1 Order type		standard (SSSS)
2 General data	Supplier	Standaard Uitgeverij (3)
	Delivery type	N
	Dispatch	Y
	Ref. no.	-
	Invoice	-
	Donor	-
	External number	-
	Bookseller	-
	Control number	-
	Exported	-
	Export category	-
	Rec/Can export blocked	-
	Status	title split
	Specification	1 c.
3 Order information		-
4 Financial data		-
	Total	-
	Source	-
	Additional costs	-
	Commitment	-
	Individual discount %	-
	Total price	-
	Individual tax (%)	-
	Taxcode	-
5 Internal notes		-
6 Supplier notes		-
7 Order status		Sent: 06/05/2009
8 Receipt status		Not:-
9 Invoice status		Not:-
10 Claim 1 status		Not:-
11 Claim 2 status		Not:-
12 Cancellation status		Not:-
Partial order		
13 Destination	1/1	
	Location(s)	BD
	Budget	2800.6
	Selection code	-
	Subscription number	-
	Location(s)	-
	Budget	-
	Shipto Code	DFLTACQ
	Material type	BO
	Circulating stock category	-
14 Order data		-
	Specification	-
	Quantity	1
	Price	5
15 Requester		-
	Name	-
	Notification	N
	Reservation	N

You will see the status (in block 2 – General data) is now 'title split' (or 'series entry' as appropriate).

<input type="checkbox"/>	2 General data	Supplier	Heinen (1)
		Delivery type	N
		Dispatch	Y
		Ref. no.	-
		Invoice	-
		Donor	-
		External number	-
		Bookseller	-
		Control number	-
		Exported	-
		Export category	-
		Rec/Can export blocked	-
		Status	series entry

If you go back to the parent record, the status in block 2 – General data is now 'main with title split':

<input type="checkbox"/>	2 General data	Supplier	Heinen (1)
		Delivery type	N
		Dispatch	Y
		Ref. no.	-
		Invoice	-
		Donor	-
		External number	-
		Bookseller	-
		Control number	-
		Exported	-
		Export category	-
		Rec/Can export blocked	-
		Status	main with title split

(or Main with series entry" as appropriate).

After you have checked the option View parent on the selection form of a child record, the order detail screen of the parent will be displayed.

Notes

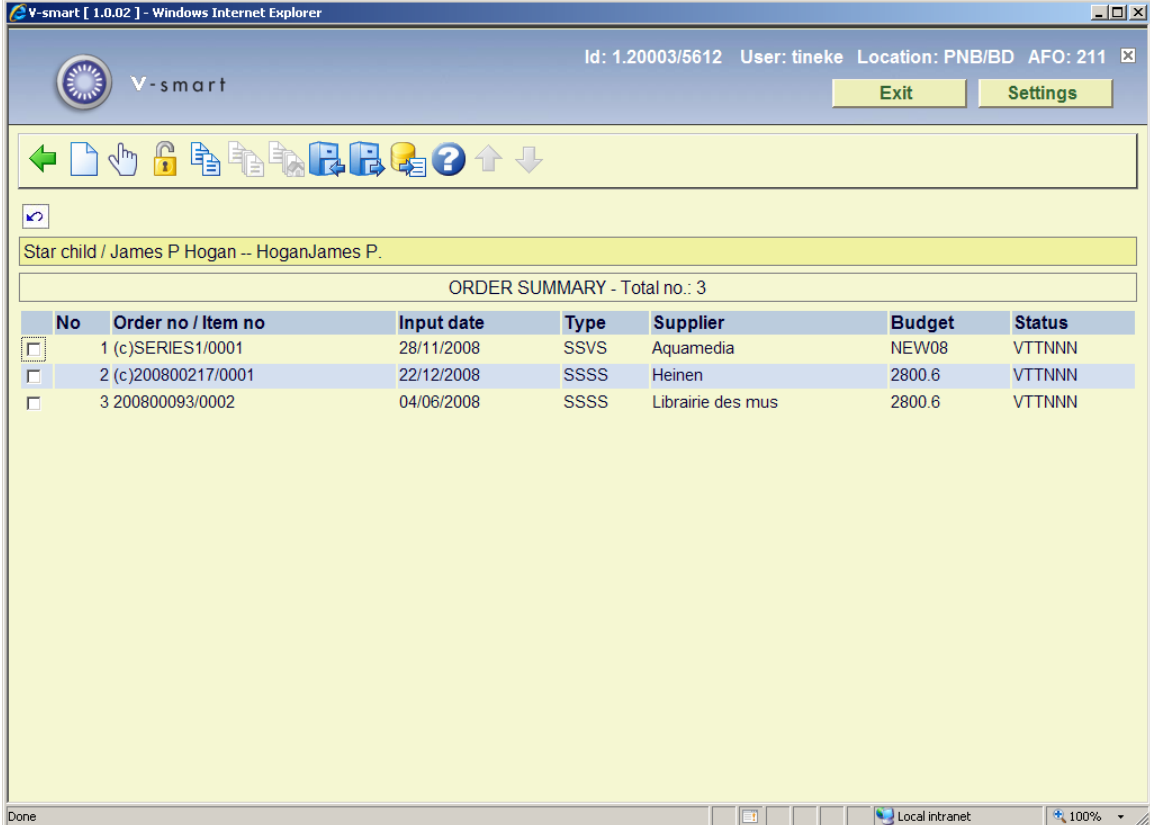
If the record you are currently displaying is a child, you cannot undo the Order status, change the supplier, print the order, add a new partial order, etc. You also cannot change the claim/cancellation dates but you can manually claim items from the receiving screen.

Child records are skipped when printing orders from AFO 251/252/253.

Child records are skipped (1st and 2nd claim dates and cancellation date fields are ignored). If necessary, child records can be claimed manually from the receiving screen.

The child must be deleted before the parent can be deleted. Use the delete current child option from the Parent/Child icon to delete a child. Please note: you must remove all receipt and invoicing information from the child before it can be deleted.

On the order summary screen, child records can be recognised by the prefix of (c) before the order number:



The screenshot shows a web browser window titled "V-smart [1.0.02] - Windows Internet Explorer". The page header includes the user ID "1.20003/5612", user name "tineke", location "PNB/BD", and AFO "211". There are "Exit" and "Settings" buttons. Below the header is a navigation bar with various icons. The main content area displays "Star child / James P Hogan -- HoganJames P." and "ORDER SUMMARY - Total no.: 3". A table lists three items:

No	Order no / Item no	Input date	Type	Supplier	Budget	Status
<input type="checkbox"/>	1 (c)SERIES1/0001	28/11/2008	SSVS	Aquamedia	NEW08	VTTNNN
<input type="checkbox"/>	2 (c)200800217/0001	22/12/2008	SSSS	Heinen	2800.6	VTTNNN
<input type="checkbox"/>	3 200800093/0002	04/06/2008	SSSS	Librairie des mus	2800.6	VTTNNN

211.5 Serials subscriptions

AFO 279 allows you to run review reports to check which serials subscriptions need to be renewed.

The system selects subscriptions to review based on the following criteria:

- The subscription has a valid link to a purchase order at detail level.
- The subscription is active.
- The subscription has the "Generate renewal" flag on.

- The subscription Review date is between the start and end dates defined under Setup in AFO 279.

Based on this report you can either renew all subscriptions automatically via AFO 279 or renew individual subscriptions manually via AFO 211.

The screenshot shows the V-smart web application interface. The browser title is "V-smart [2.0] - Windows Internet Explorer". The page header includes "Id: 1.23013/5260" and "Port identification: Tineke PNB/BD 211". The main content area displays the following data:

Second serial to review and renew		
ORDER 2010-00144/0001 (2.4019) - Second serial to review and renew		
General data		
1 Order type		standard periodical (SSTS)
2 General data	Supplier	TvB's Bookstore (428)
	Delivery type	N
	Dispatch	Y
	Ref. no.	-
	Invoice	-
	Donor	-
	External number	-
	Bookseller	-
	Control number	-
	Exported	-
	Export category	-
	Reo/Can export blocked	-
3 Order information	Specification	sub 1 c.
	Status	-
4 Financial data	Total	99 EUR
	Source	-
	Additional costs	0
	Commitment	99 EUR
	Individual discount %	-
	Total price	-
	Individual tax (%)	0
	Taxcode	-
5 Internal notes		-
6 Supplier notes		-
7 Order status		Sent : 05/05/2010
8 Receipt status		Partially : 06/05/2010
9 Invoice status		Partially : 06/05/2010
10 Claim 1 status		Not : 20/06/2010
11 Claim 2 status		Not : 04/08/2010
12 Cancellation status		Not : 03/09/2010
Partial order		1/1

The option **Renewal** on the order detail screen is only active for orders with a serial subscription linked to the order number. After choosing this option a selection form will be displayed:

Order subscription renewal

Review date: 01/06/2010

Subscription start: 01/01/2010

Subscription end: 30/06/2010

Renewal period: 182

Inflation rate (%): 10

Buttons: OK, Cancel, Help

Address bar: http://nlbawqavubis/sm200qa/ClientBody.csp?ClientId=1.23007

Status bar: Local intranet

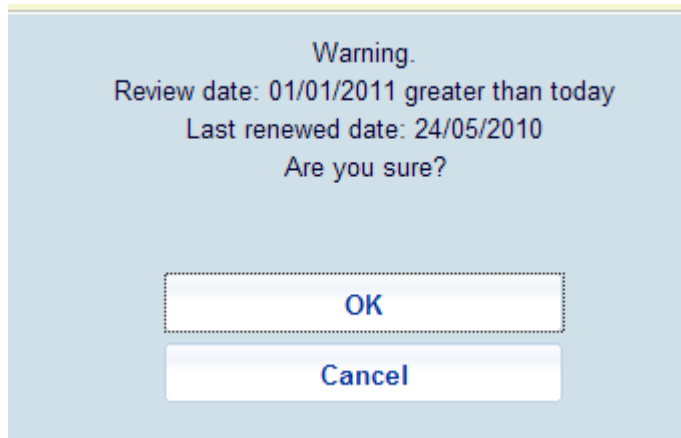
The data in the first four fields is derived from the general details of the subscription. The fifth field (inflation rate) is derived from the Setup in AFO 279.

You can manually adjust this information if required. Inflation rate may also be negative (e.g. "-10").

After clicking **OK** the system will:

- check that there is sufficient money in the budget to encumber for the renewed order. If not, the renewal will not take place
- reset the start date to "end date +1"
- reset the end date to "old end date + renewal number of days"
- reset the review date by adding the renewal number of days to it
- adjust the total price and commitment on the order (based on the inflation rate)
- adjust the commitment on the budget of the order

If the review date is greater than today, the system will display a warning message:



When you click **OK** you can continue the renewal process anyway.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	June 2008	creation	
2.0	January 2009	new feature standing orders (parent/child); update for 'specification' field	
3.0	May 2009	new option to display the bibliographic record from the order screen; more info on price with 'T'; new option for the input of additional item information during ordering; more info on manual order numbers; more info on deleted order lines part of 2.0 updates	
4.0	May 2010	new additional order fields; new option to update supplier info; new option for subscription renewal; general overhaul part of 2.0.06 updates	