

AFO 213 – Order summary

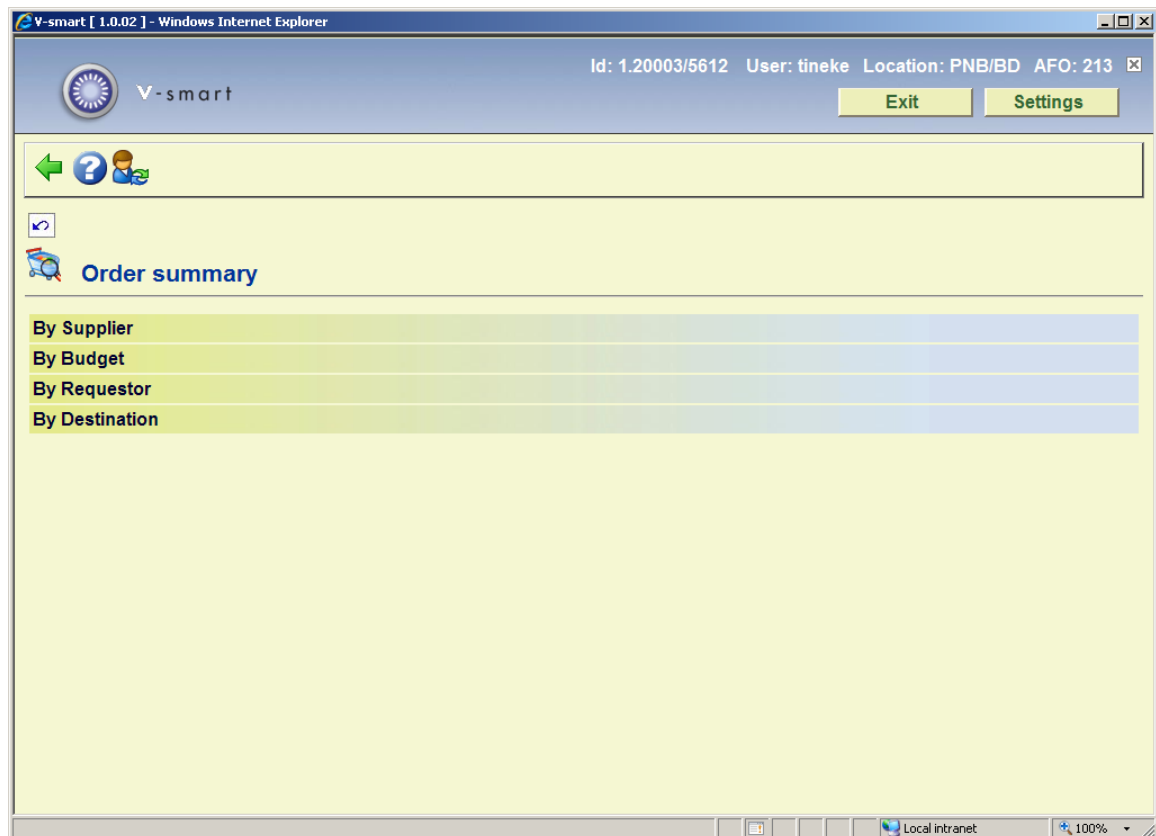
213.1 Introduction

With this AFO you can generate summaries of the purchase orders that have been input. These can be compiled in four ways, namely by budget, supplier, requester or destination. You can select the summary of your choice in the menu screen that is displayed when you select this AFO. The options available are discussed in more detail below. The procedure to be followed for all four summaries is virtually identical so we will only give step by step instructions on how to create a summary by supplier, but pointing out any differences in the other types of summary.

Note

Only non-archived purchase orders will be displayed.

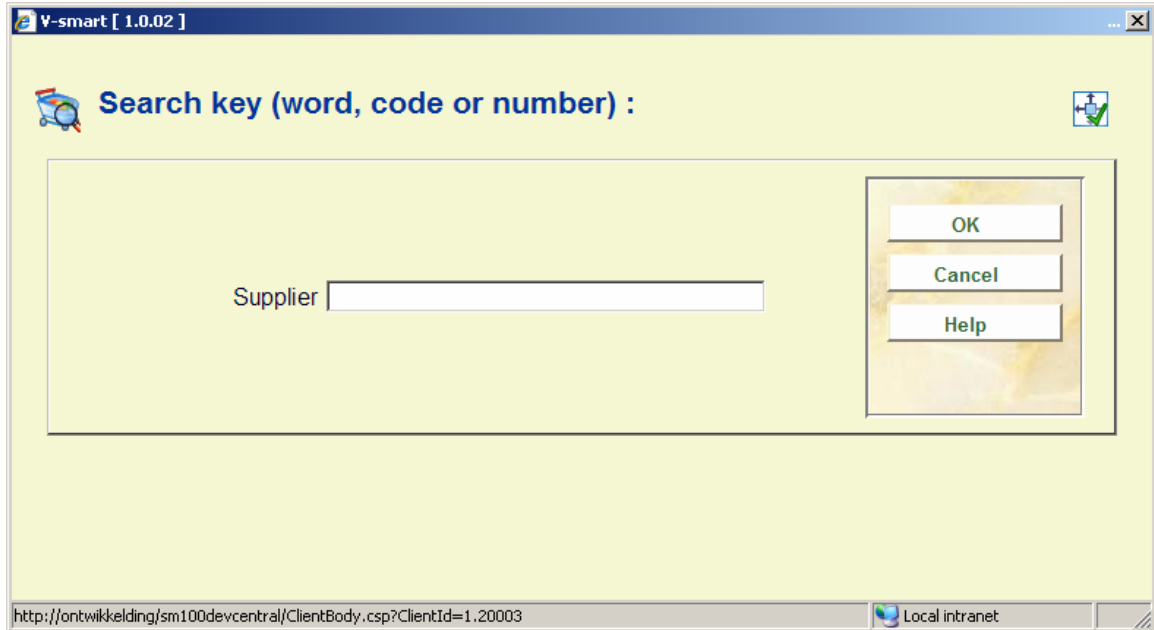
After choosing this AFO a menu will be displayed:



The menu options are described in the next sections.

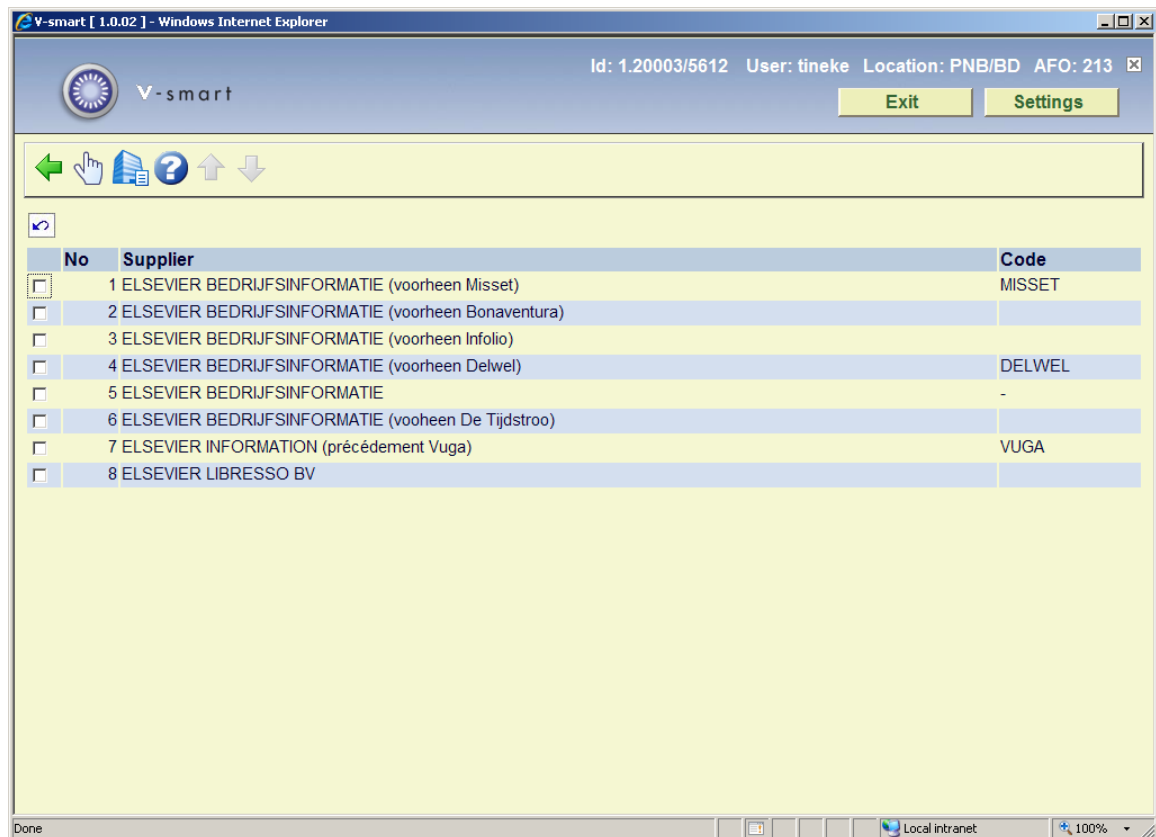
213.2 By Supplier

An input screen will be displayed when you select this menu option.



The screenshot shows a web browser window titled "V-smart [1.0.02]". The main content area has a light yellow background and contains the text "Search key (word, code or number) :". Below this text is a large rectangular input field. To the right of the input field is a vertical stack of three buttons: "OK", "Cancel", and "Help". The input field is currently empty and has the word "Supplier" written next to it. The browser's address bar at the bottom shows the URL "http://ontwikkeling/sm100devcentral/ClientBody.csp?ClientId=1.20003" and the text "Local intranet".

Input the name or partial name of the supplier here. A survey screen with a list of suppliers (that comply with the specified criterion) will be displayed. If you have defined a supplier code you can enter it here. Alternatively you can enter the internal number of a supplier if you know it. In both of these cases a survey screen for that supplier will be displayed immediately. (The procedure is the same for generating a summary by budget, destination code or requester.)



Options on the screen

Choose supplier - Select the supplier and click on this option. A summary screen will be displayed with the details of that supplier. Use the screen option '**Continue**' to go to the summary screen of all the purchase orders on order from that supplier.

Select and continue: Select the supplier and click on this option. You are immediately taken to a summary screen with all the purchase orders on order from that supplier. If there are no orders for a supplier, a message will appear: "no orders registered !".

V-smart [1.0.02] - Windows Internet Explorer

Id: 1.20003/5612 User: tineke Location: PNB/BD AFO: 213

V-smart

Exit Settings

Summary of orders with Heinen [1]

No	Order no./Item no.	Order date	Budg.	Status	Price	Outstanding	Paid	Curr	Ext. number	Title	Copies per location
<input type="checkbox"/>	1 TVB876/0001	16/12/2008	2800.6	VTTNNN	4.62	0.00	0.00	EUR	TVB888	Tineke test titel 1	[1] 1 (BD)
<input type="checkbox"/>	2 TVB567/0001	16/12/2008	2800.6	VTTNNN	4.62	0.00	0.00	EUR	TVB888	Tineke orders a book	[1] 1 (BD)
<input type="checkbox"/>	3 2009-00037/0001	23/01/2009	2800.6	VNNNNN	4.62	4.62	0.00	EUR		Star Trek Voyager	[1] 1 (BD)
<input type="checkbox"/>	4 2009-00034/0001	23/01/2009	2800.6	VNNNNN	4.62	4.62	0.00	EUR		Depth perception in frogs and toads	[1] 1 (BD)
<input type="checkbox"/>	5 2009-00017/0001	14/01/2009	2800.6	VNPNNN	9.25	4.63	0.00	EUR		MC: A Boy And His Tank	[2] 1 (BD,CEN)
<input type="checkbox"/>	6 2009-00007/0001	06/01/2009	2800.6	VPPNNN	46.25	0.00	0.00	EUR		Dominicus reeks	[1] 1 (BD)
<input type="checkbox"/>	7 2009-00004/0002	06/01/2009	2800.6	INNNTN	4.62	4.62	0.00	EUR		Star Trek and more	[1] 1 (BD)
<input type="checkbox"/>	8 2009-00004/0001	06/01/2009	2800.6	INNNTN	4.62	4.62	0.00	EUR		Beyond the Star above and more and less	[1] 1 (BD)
<input type="checkbox"/>	9 200800223/0001	23/12/2008	2800.6	VTTNNN	4.62	0.00	0.00	EUR		MC: A Boy And His Tank	[1] 1 (BD)
<input type="checkbox"/>	10 200800222/0001	23/12/2008	2800.6	VPPNNN	18.50	13.88	0.00	EUR		MC: A Boy And His Tank	[4] 1 (BD,CEN,SCH,WP)
<input type="checkbox"/>	11 200800218/0001	23/12/2008	2800.6	VPPNNN	0.00	0.00	0.00	EUR		A Boy And His Tank	[3] 3 (BD)
<input type="checkbox"/>	12 200800217/0001	22/12/2008	2800.6	VPPNNN	4.62	0.00	0.00	EUR		Star Trek Voyager	[1] 1 (BD)
<input type="checkbox"/>	13 200800202/0001	04/12/2008	2800.6	VPPNNN	4.62	0.00	9.14	EUR		Tineke's parent/child order	[1] 1 (BD)
<input type="checkbox"/>	14 200800196/0002	23/10/2008	2800.6	VTTNNN	4.62	0.00	0.00	EUR	tvbextern	Voetstappen in het zand journal	[1] 1 (BD)
<input type="checkbox"/>	15 200800196/0001	23/10/2008	2800.6	VTTNNN	4.62	0.00	0.00	EUR	tvbextern	Moord onder water	[1] 1 (BD)
<input type="checkbox"/>	16 200800160/0001	14/07/2008	16/22	INNNTN	0.00	0.00	0.00	EUR		Star Crusader	[1] 1 (WP)
<input type="checkbox"/>	17 200800159/0001	14/07/2008	16/22	INNNTN	0.00	0.00	0.00	EUR		Dancing on the Volcano with Jeanne d'Arc	[1] 1 (BD)
<input type="checkbox"/>	18 200800156/0001	10/07/2008	2800.6	INNNTN	46.25	46.25	0.00	EUR		Commissaire Maigret	[20] 20 (BD)
<input type="checkbox"/>	19 200800155/0001	10/07/2008	2800.6	VNTNNN	9.25	0.00	0.00	EUR		Commissaire et Madame Maigret	[4] 2 (CEN) 1 (BD,WP)
<input type="checkbox"/>	20 200800151/0001	10/07/2008	2800.6	VNNNNN	6.93	6.93	0.00	EUR		The murdered star	[3] 1 (BD,BRA,CEN)
				total	187.25	90.17	9.14	EUR			

Local intranet 100%

Columns on the screen

No: a line number;

Order no./item no.: the order number - an '!' (exclamation mark) after this number means that this purchase order has been locked;

Order date: the order date;

Budg.: the budget(s);

Status: the order status;

Price: the total budget commitment amount (V price);

Outstanding: the outstanding amount for this order (this can be the same as the order price, zero when everything has been paid, odr a different amount is a partial payment has been made);

Paid: the amount paid for this order;

Curr: the unit of currency of the committed price;

Ext.number: an optional external (order)number;

Title: part of the title;

Copies per location: the total number of copies order, with a subdivision in copies ordered per location;

The system displays the total committed price at the end of this summary. This total is cumulative up to and including the last purchase order displayed on the screen (including all the orders displayed before); it is not the general total of all purchase orders on order from this supplier.

Note

The budget commitment amounts are displayed regardless of the status of the purchase order regarding invoicing or payment. Useful financial information cannot be obtained from these summaries.

Screen options

Detailed info (+) - select a purchase order and click on this option to display detailed information on it.

Create savelist - with this option you can save the summary in a save list. When you select this option an input screen will be displayed. Enter the name of the save list you want to use or select one from the list.

Remove requestor- with this option you can delete the requestor from all the purchase orders displayed.

Change supplier: with this option you can change the supplier for the orders. See section 231.2.1.

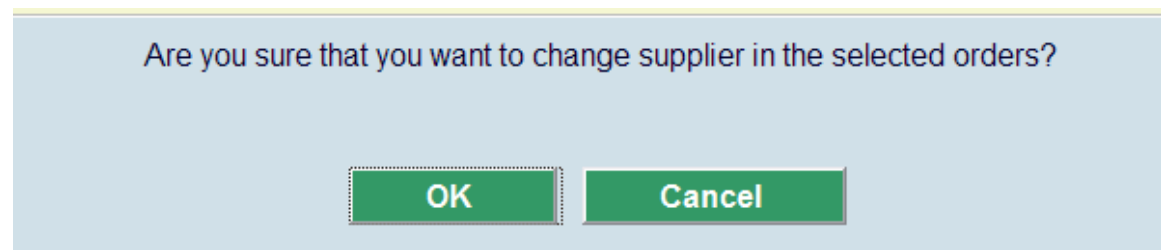
View bib: select an order and then this option to view the associated bibliographic record, which will be displayed in read-only mode in a separate window.

Restrict orders to be viewed - with this option you can limit the purchase orders displayed by certain criteria. See section 231.2.2.

213.2.1 Change supplier

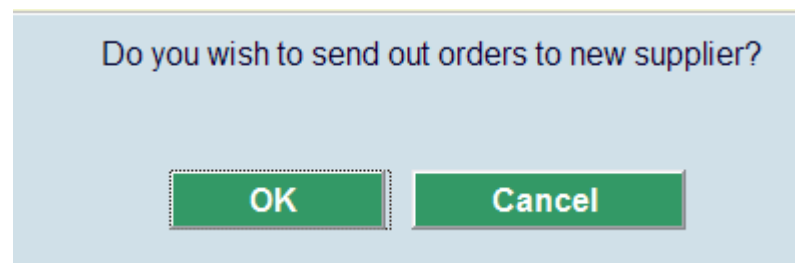
Change supplier: with this option you can change the supplier for the orders.

The **Change supplier** option is valid only after you have restricted the summary to a specific supplier (either from the menu option – *By supplier* or by using the *Restrict orders to be viewed* icon for the other options). When you select the **Change supplier** option, the system prompts for a new supplier (with the search form as described above). After selecting a new supplier the system asks:



The system will change the supplier in all of the orders on the Order summary screen that have not been invoiced and are not part of a multi-title order.

When you click on **OK**, the system then asks:



When you click on **OK**, the system displays the standard screens for printing purchase orders immediately.

The system then redisplay the Order summary screen containing any orders that did not have the supplier changed.

213.2.2 Restrict orders to be viewed

Restrict orders to be viewed - with this option you can select the purchase orders displayed by date, status of the purchase order, order type, budget and location. If you select this option an input screen will be displayed on which you can input the desired criteria.

V-smart [1.0.02]

ORDER SUMMARY

From date

To date

Status

Order type

Budget

Location

OK

Cancel

Help

http://ontwikkeling/sm100devcentral/ClientBody.csp?ClientId=1,20003 Local intranet

Fields on this screen

From date - input the date on which you want the summary to start;

To date - input the date on which you want the summary to end;

Status - input the status of the purchase orders to be displayed. You can use an '*' (asterisk) as wild card. If you enter one or more characters, wild cards will be added to make a total of 6 letters. Valid statuses are:

- For purchase orders: I (input), G (locked) and V (sent)
- Other statuses: N (not), P (partial) and T (total)

Example

'G' becomes 'G*****'. All purchase orders with a status beginning with 'G' (locked, entered in final print file).

'V**T' becomes 'V**T**'. Only purchase orders with the order status sent and for which the status of the first reminder is total (regardless of their status regarding receipt, invoice registration, second reminder and cancellation) will be displayed.

Order type - input a valid order type of the purchase orders to be displayed. You can use an '*' (asterisk) as wild card. If you enter one or more characters, wild cards will be added to make a total of 4 letters.

Example

'*E' becomes '*E*'. All the external purchase orders will be displayed.

If you input '***R' all the retro purchase orders will be displayed.

Budget - enter a budget or select one from the dropdown list.

Location - enter a location or select one from the dropdown list.

The contents of the dropdown list are the destination codes as defined in AFO 244 – Destinations – Destinations.

After one or more criteria have been input, a survey screen will be displayed with the purchase orders that fulfil these criteria. If no orders fulfil the criteria the message 'No purchase orders noted' will be displayed.

213.3 By Budget

If you select this menu option an input screen will be displayed. You follow virtually the same steps as for "**By Supplier**". See section 213.2 above. Here you can restrict the summary to date, status, type of order, supplier and location.

The option for supplier will be changed to a dropdown list if the number of suppliers on the system is less than the supplier threshold defined in AFO 272 – Miscellaneous – Enter maximum number of suppliers in dropdown list.

213.4 By Requester

If you select this menu option an input screen will be displayed. You follow virtually the same steps as for "**By Supplier**". See section 213.2 above. Here you can restrict the summary to date, status, type of order, budget, supplier and location.

The option for supplier will be changed to a dropdown list if the number of suppliers on the system is less than the supplier threshold defined in AFO 272 – Miscellaneous – Enter maximum number of suppliers in dropdown list.

213.5 By Destination

If you select this menu option an input screen will be displayed. You follow virtually the same steps as "**By Supplier**". See section 213.2 above. Here you can restrict the summary to date, status, and type of order.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	July 2008	Creation	
2.0	January 2009	new options: change supplier and view bib	