

AFO 271 – Print parameters control

271.1 Introduction

The acquisitions module is highly parameterised. A lot of the parameters, especially with regard to printing, can be set interactively. The following options are offered:

- Printing (yes/no)
 - For each order type in combination with each printout type, you can specify whether or not prints must be generated. If you set this parameter to 'No' for a certain type, then the setting of other parameters becomes irrelevant for that type.

- Layout
 - You can design your own layouts for the acquisitions module. This does not only include the texts and general layouts, but also the contents.

 - On top of that you can design different layouts for each type of printout (like order forms, claims, cancellation notices) in combination with different types of recipients (supplier, staff, requestor).

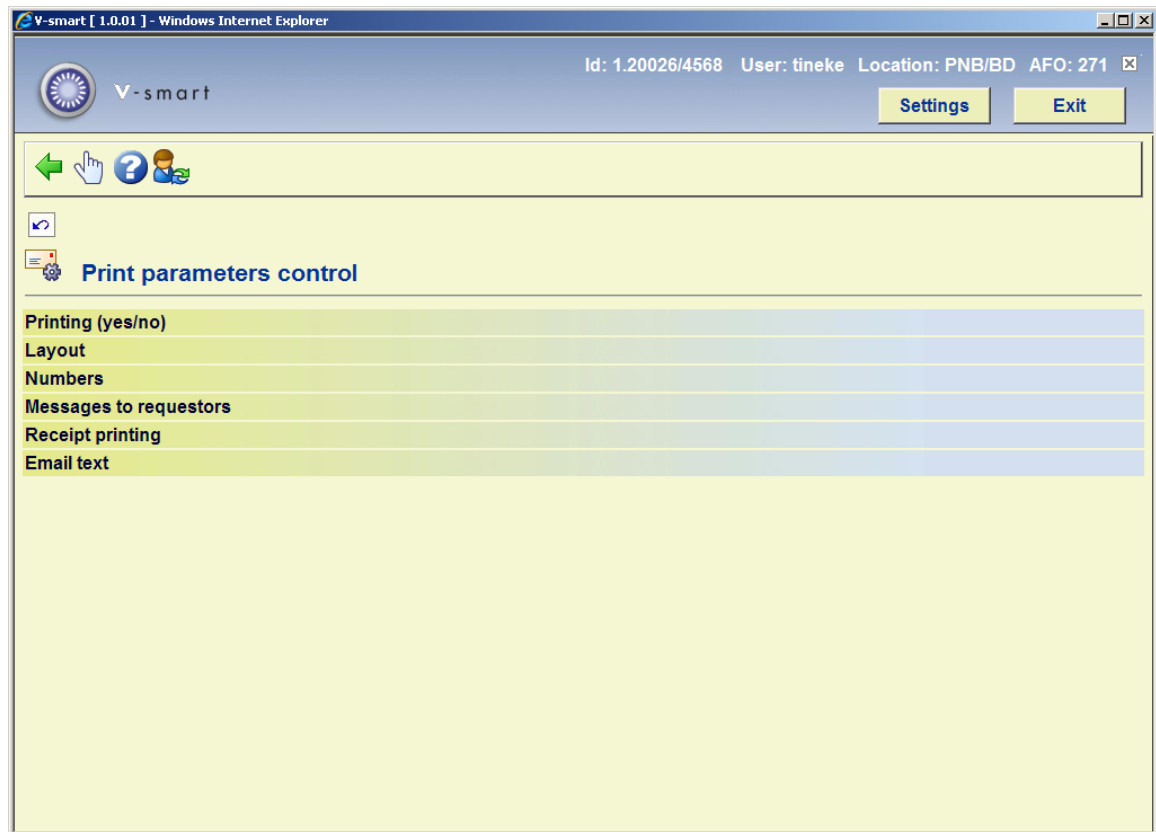
- Numbers
 - The number of notices to be printed is 'free'. You can make any combination between type of printout and recipient (like two order forms for a supplier plus one each for requestor and staff).

- Messages to requestors
 - Here you can set if requestors must always be notified for a particular type of printout.

- Receipt printing
 - parameters that specifically deal with printing receipt notices.

271.2 Parameter maintenance

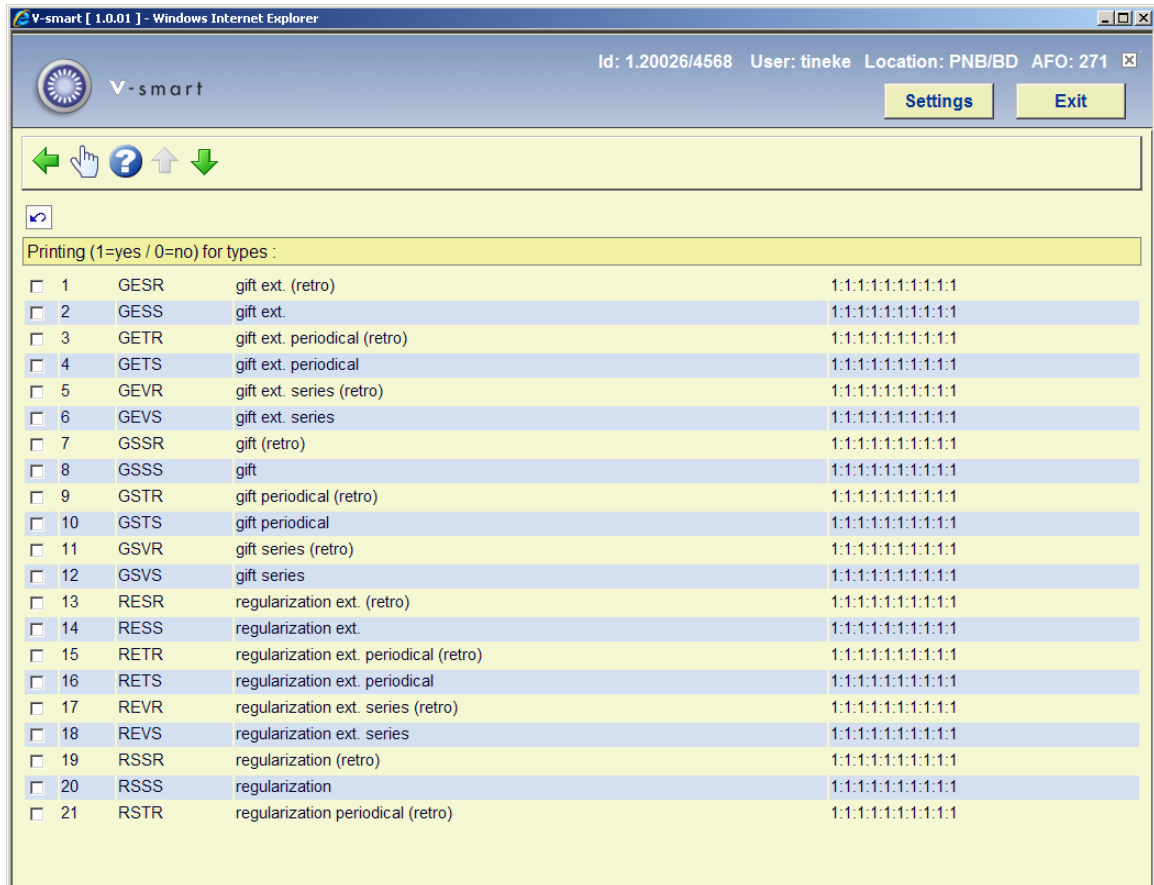
After choosing AFO 271 a menu is displayed:



These options are described in the next paragraphs.

271.2.1 Printing (yes/no)

When you choose this option an overview screen is displayed with the settings for each order type in combination with all types of printouts:



Columns on this screen

Order type: The 48 order types that are valid in Vubis Smart.

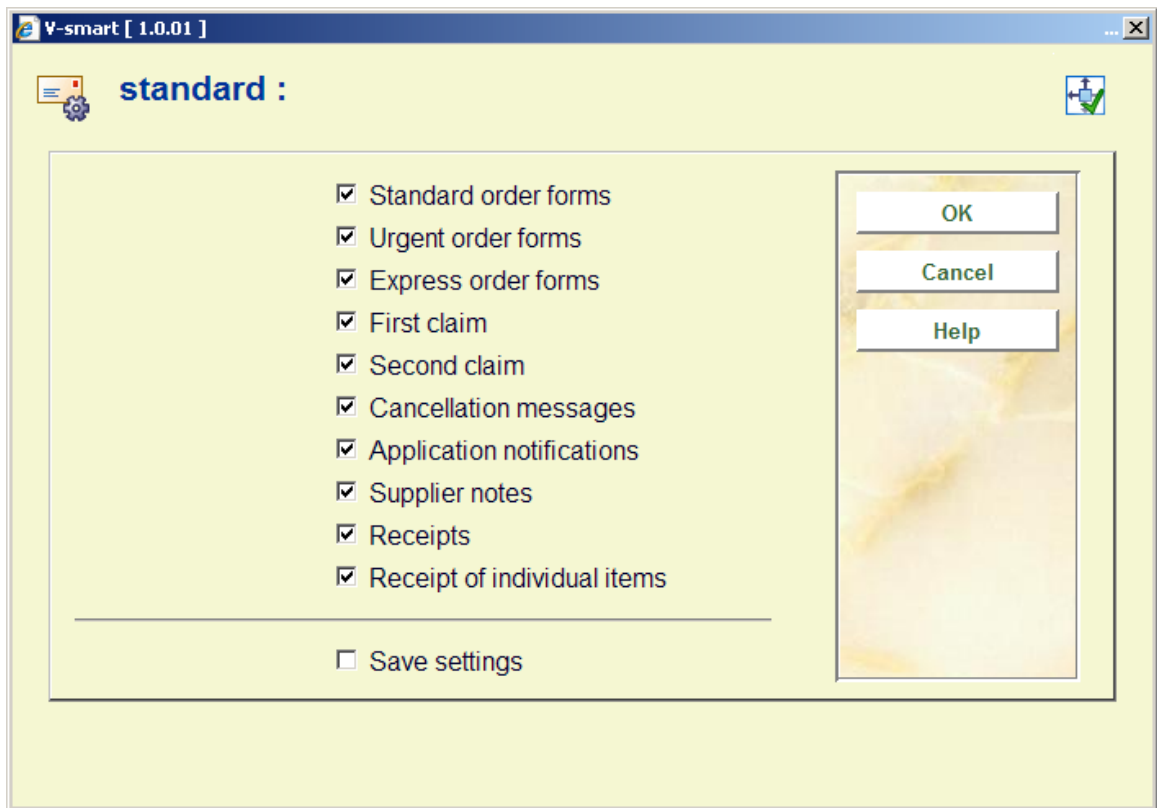
Description: The description of the order types.

Print Y/N: The ten numbers denote whether or not printouts must be generated for each of the ten types of printouts (see the relevant section of AFO 251 for more information). A 1 means "Yes", a 0 means "No".

Options on this screen

Choose line no (+): Select a line (order type) and click on this icon to set whether or not printouts must be generated

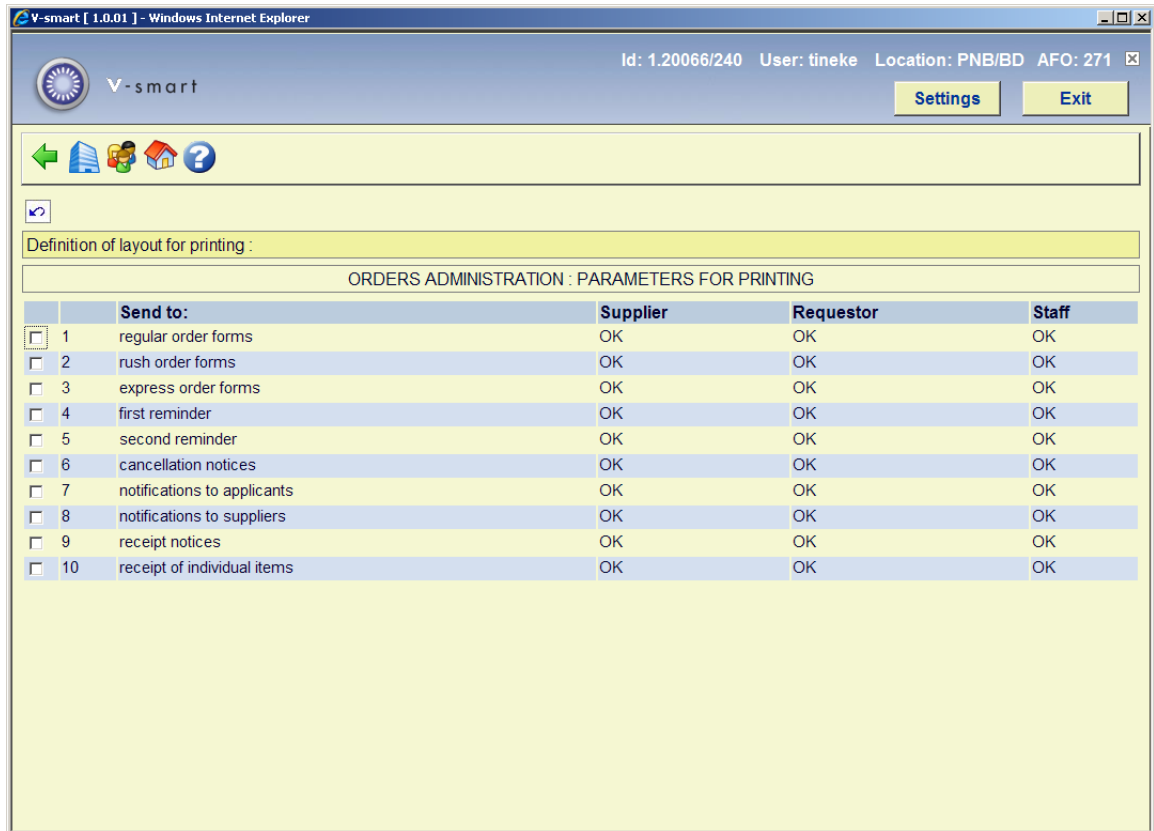
The following input form will be presented:



You can now set the parameters by ticking the relevant boxes.

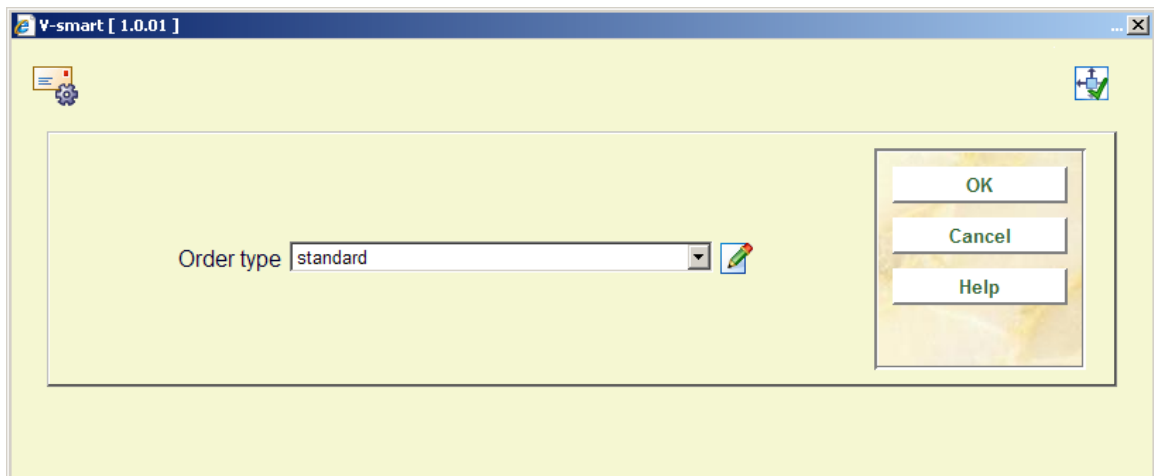
271.2.2 Layout

When you choose this option an overview screen will be displayed with all ten types of printouts in combination with all types of recipient. The options will be discussed in section 271.3.



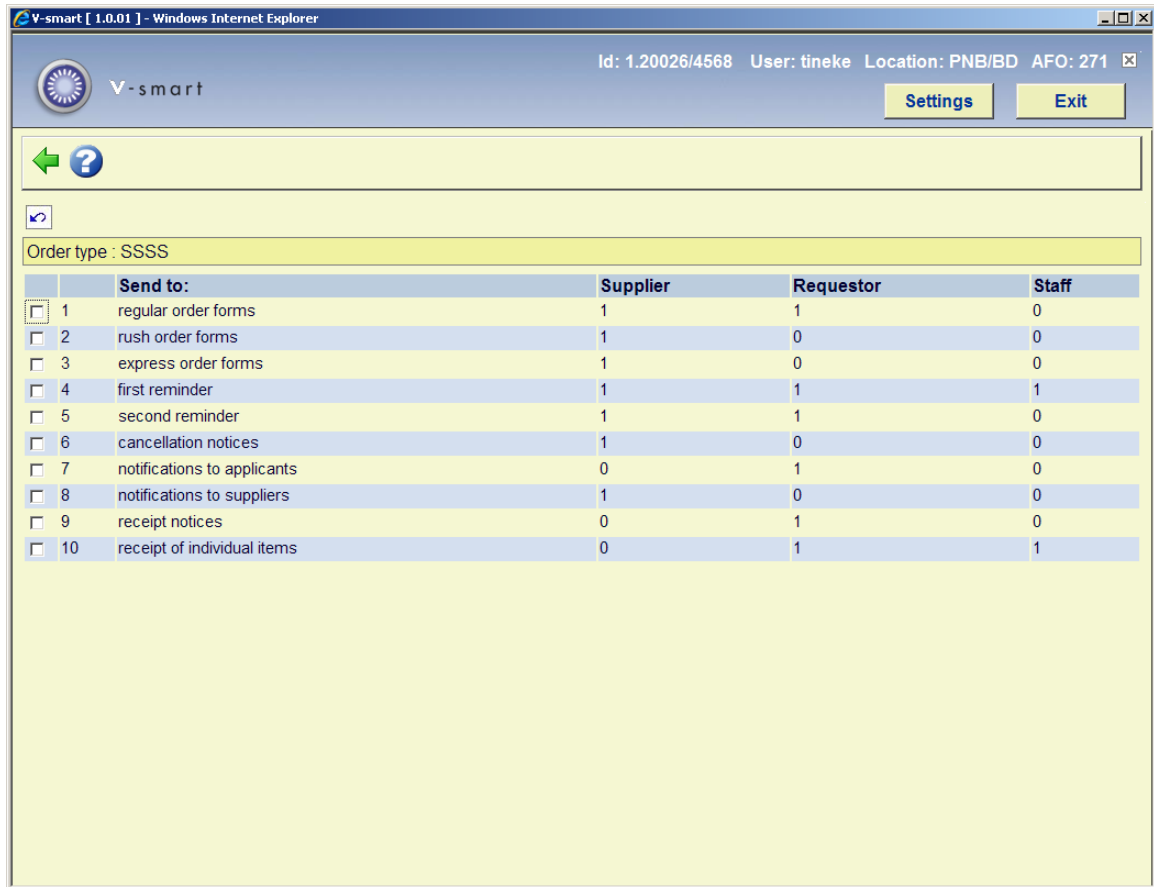
271.2.3 Numbers

When you choose this option the following form will be displayed:

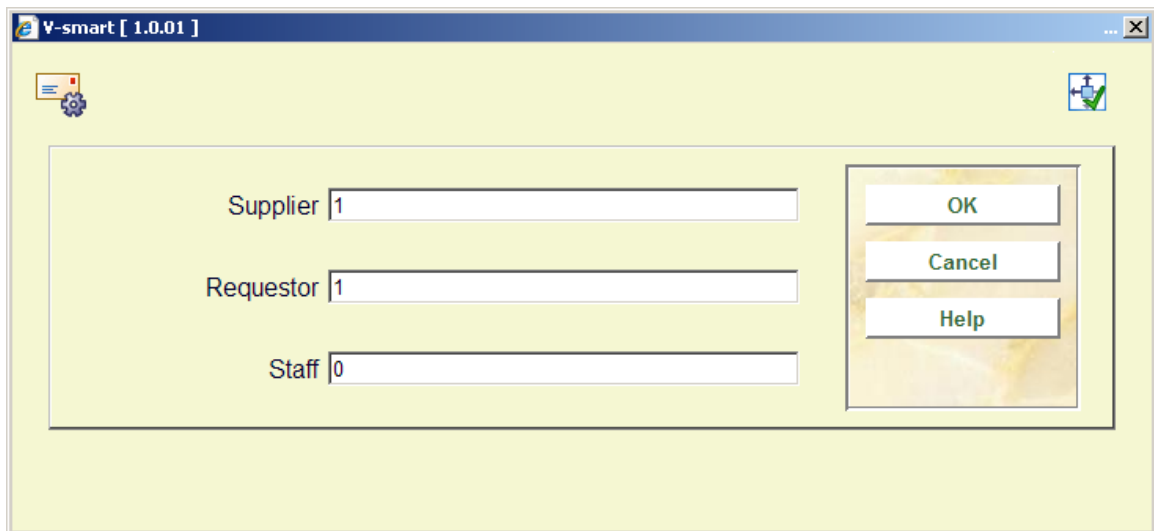


Choose an order type from the dropdown list and click **OK**.

An overview screen will be displayed with the numbers for each combination of type of printout and recipient:



Click on a line and the following input screen will be displayed:



Put in the required numbers and click **OK**.

271.2.4 Messages to requestors

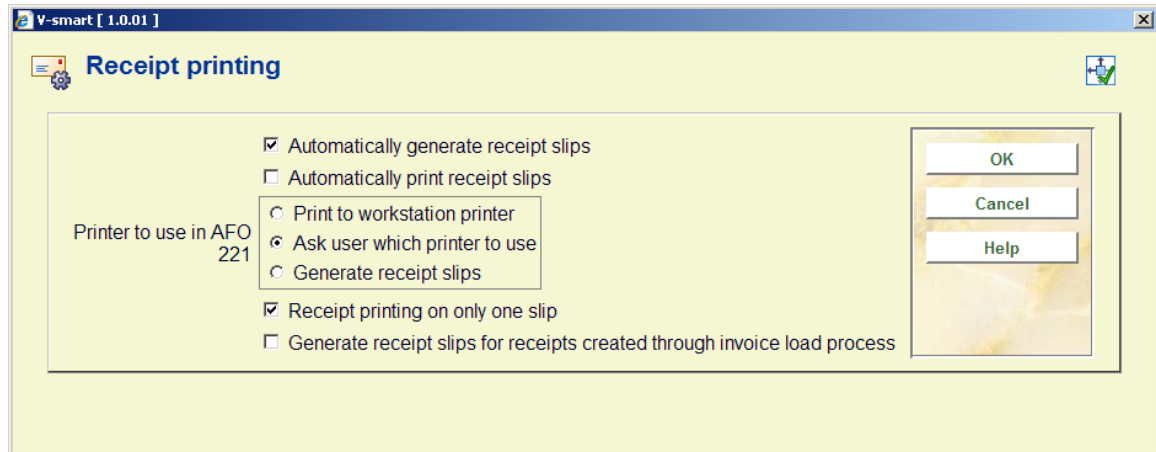
When you choose this option an overview screen will be displayed with all ten types of printouts. With a 1 or a 0 you can set whether or not a message must be sent to requestors for a type of printout.

Always notify requestor(s) for the types:		
<input type="checkbox"/>	1 regular order forms	1
<input type="checkbox"/>	2 rush order forms	0
<input type="checkbox"/>	3 express order forms	0
<input type="checkbox"/>	4 first reminder	1
<input type="checkbox"/>	5 second reminder	0
<input type="checkbox"/>	6 cancellation notices	0
<input type="checkbox"/>	7 notifications to applicants	1
<input type="checkbox"/>	8 notifications to suppliers	1
<input type="checkbox"/>	9 receipt notices	1
<input type="checkbox"/>	10 receipt of individual items	1

Click on a line to set the required parameter (toggle between 1 and 0).

271.2.5 Receipt printing

Choosing this option displays an input form with five options:



Options:

- **Automatically generate receipt slips** – if checked, the system generates receipt slip requests (that are subsequently processed in Job 10 of AFO 252/253) for each copy received when you exit the Acquisitions receiving process. If this option is checked, the field “*Printer to use in AFO 221*” is ignored.

- **Automatically print receipt slips** – if checked, the system prints receipt slips for each copy received when you exit the Acquisitions receiving process. If this option is checked, the next field must be set to either *Print to workstation printer* or *Ask user which printer to use*.

- **Printer to use in AFO 221**, choose one of the three options:
 - Print to workstation printer

 - Ask user which printer to use.

 - Generate receipt slip

- If neither *Automatically generate receipt slips* nor *Automatically print receipt slips* field is checked, you must use the Print icon in Acquisitions receiving process to initiate either printing or generation of receipt slip requests for each copy received based on the value in the *Printer to use in AFO 221* field.

- **Generate receipt slips for receipts created through invoice load process?** – if checked, the system generates receipt slip requests (that are subsequently processed in Job 10 of AFO 252/253) during the NBD invoice load process.

Note:

Only one or none of the *Automatically generate receipt slips* and *Automatically print receipt slips* fields can be set.

- **Receipt printing on only one slip?** – if checked then the system will print only one slip for the whole order, with a summary that contains the information for all the copies received. This summary will include location, budget, number of items received at that location for that budget, price per item (actual amount paid), the total amount and the note for this partial order.

Example

Location	Budget	Items	Price per item	Total Amount	Note
C	1000	1	5	5	
B	1001	5	5	25	
A	1002	6	5	30	note text

271.2.6 Email text

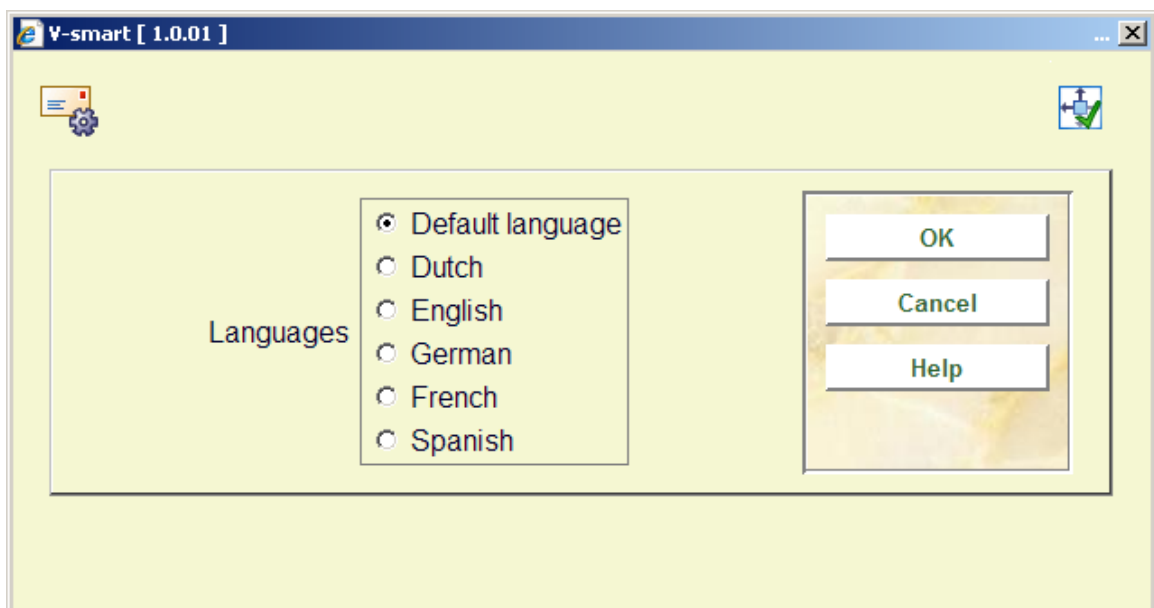
With this option you can define a subject line as well as additional body text for acquisitions messages sent via email. The additional body text can be some optional Introductory information.

When you choose this option an overview screen will be displayed with all ten types of printouts which can be combined with all types of recipient:

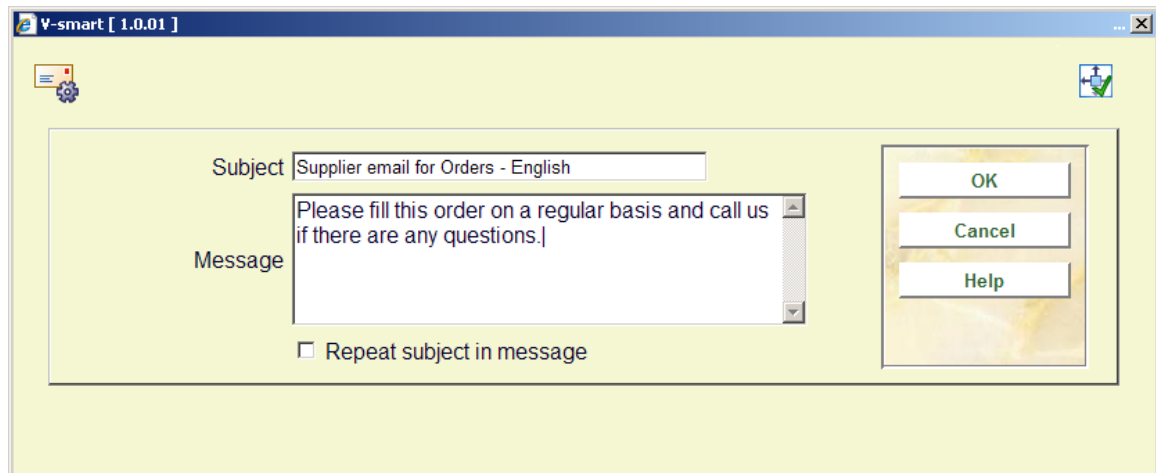


Just like under the option Layout you can define different texts for each type of recipient (supplier, requestor or staff).

After you have chosen a type of printout in combination with a recipient, a selection screen is displayed:



After choosing the required language the input form for defining subject line and additional text appears:



The screenshot shows a dialog box titled "V-smart [1.0.01]". It contains a "Subject" text field with the value "Supplier email for Orders - English". Below it is a "Message" text area containing the text "Please fill this order on a regular basis and call us if there are any questions." There is a checkbox labeled "Repeat subject in message" which is currently unchecked. On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help".

Fields on the screen

Subject: This text appears in the Subject field of the email.

Message: This text appears at the beginning of the email body followed by the information as defined in the layout. Enter the character '|' to indicate new line/line break within the message body.

Repeat subject in message: when the checkbox is on, the text from the subject field will be also included as the first line in the email body.

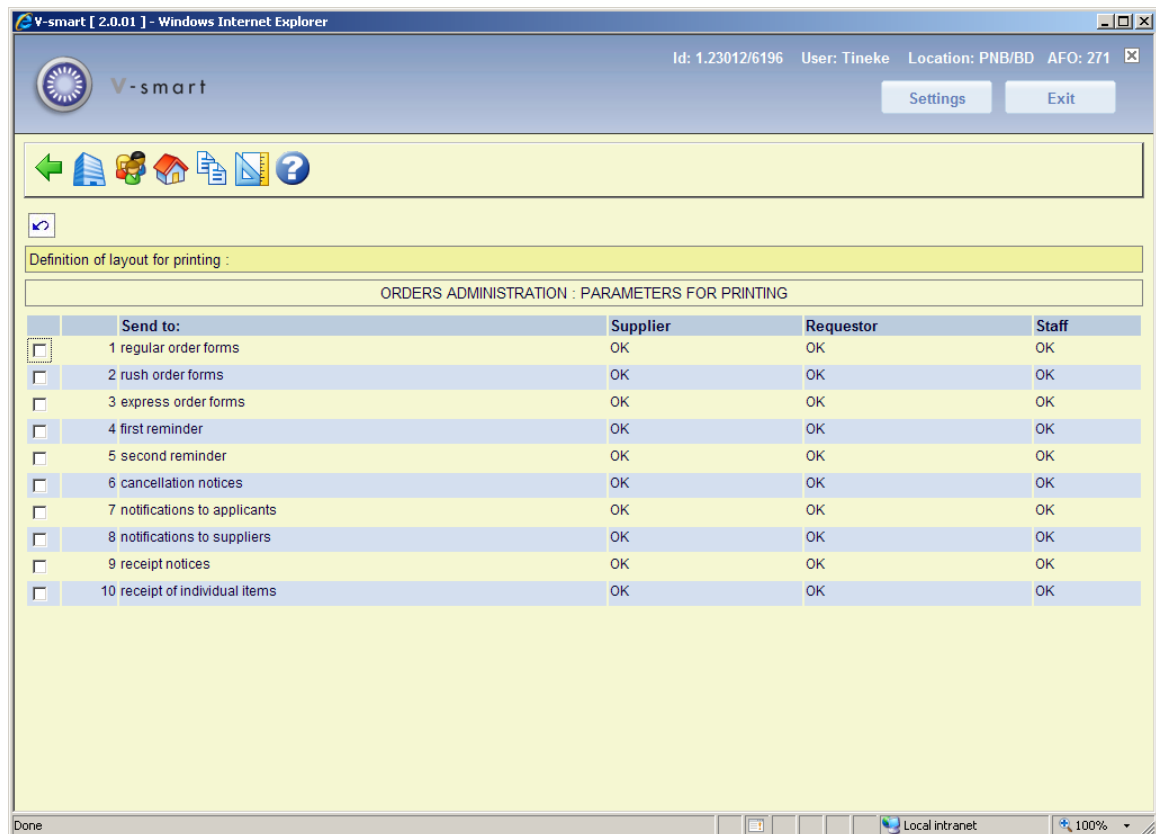
If texts have been defined for the language code assigned to the supplier, then these texts are used for the email. Else the system will use the Default language texts for the subject & body.

271.3 Layout

Important is that the system can generate order forms (every order on a separate page) or order lists (multiple orders on one page). This (forms or lists) applies to all types of printouts.

The system supports three types of order print forms: regular, rush and express. Because of this distinction it is possible to differentiate between urgent and less urgent orders (e.g. regular orders can be printed once a week and for more urgent orders "rush" or "express" is used so they can be printed daily). The combination of ten types of printouts and three recipients potentially gives thirty types of printouts.

After choosing the option 'Layout' from the main menu in AFO 271 an overview screen is displayed with all ten types of printouts in combination with all types of recipient. The 'OK' denotes that a layout has been defined for a particular combination.



Options on this screen

Print for supplier (+): Use this option to define layouts for all types of output sent to a supplier. See section 271.3.1.

Print for requestor (+): The procedure is identical to print for supplier.

Print for staff (+): The procedure is identical to print for supplier.

Copy profile: Use this option to copy profiles. See section 271.3.2.

Define layout for partial order: Use this option to define additional layout for partial order lines. See section 271.3.3.

271.3.1 Define layouts

Select a type of printout and click this icon to design the layout of this printout for the supplier. When doing this for a new layout the system will display the following input forms:

V-smart [1.0.01]

Print profile management

Comment for print profile

Print profile type Block Column

OK
Cancel
Help

- **Print profile type:** choose “Blocks” to have the data printed in blocks for each title (order information will be displayed in blocks containing a line for each element defined) or “Columns”(order information will be displayed in columns containing the various data elements for all orders).

V-smart [1.0.01]

Printing profile : SSP-ACQ-BONE-L - Layout and pagination

Lines per page

Characters per line

Left margin

Top margin

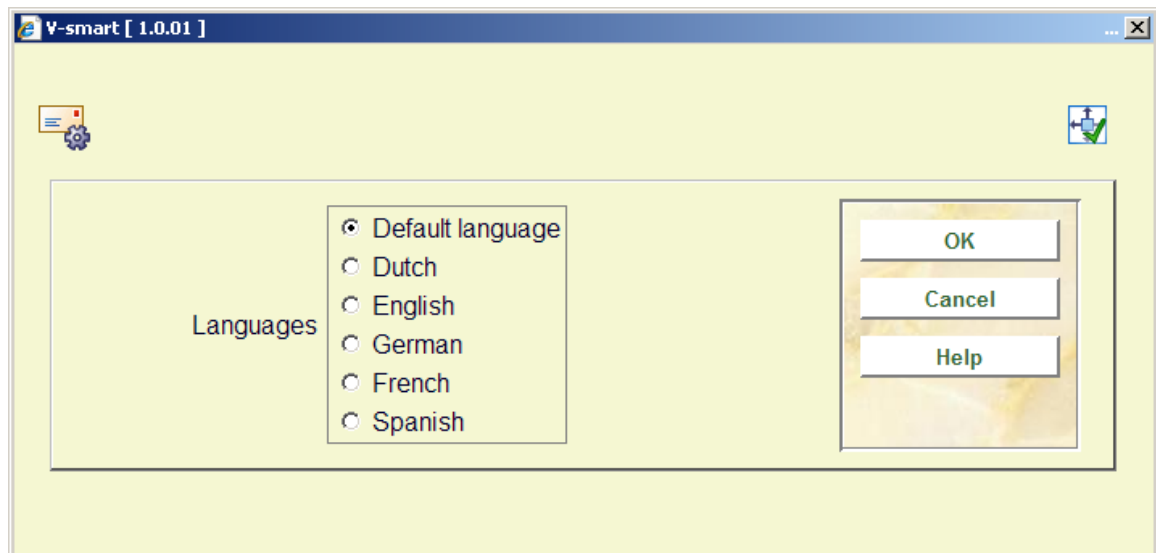
Bottom margin

Page numbers (N (o)/B(top)/O(bottom))

Place of pagination



OK
Cancel
Help

This input form deals with the various setting for the page layout. The options for **Place of pagination** are: C (centre), L (left), or R (right); they have no effect if the previous option (**Page numbers**) is set to 'N'.



This input form allows you to define text for top and bottom of the forms in various languages. After choosing a language and clicking **OK** the form is presented:

V-smart [1.0.01]

 **Texts at top and bottom** 

Texts at top

Line 1

Line 2

Line 3

Line 4

Line 5

Line 6

Centre

Texts at bottom

Line 1

Line 2

Line 3

Line 4

Line 5

Line 6

Centre

Enter texts as appropriate and repeat this for as many languages as necessary. When you have finished this section click **Cancel** to proceed to the next form:

V-smart [1.0.01]

Print profile : SSP-ACQ-BONE-L - General structure

No columns/blocks

Separate data

Separate blocks with blank line

Split data after max.

Lines

Switch to new page

Save settings

OK

Cancel

Help


This form deals with the general characteristics of the order (or claim or cancellation) notice.

The **No columns/blocks option** allows you to define the number of columns or blocks (depending on the choice you made on the first screen) containing data such as title, order number, price etc. you want to print on the order (or claim or cancellation) notice.

Next you are prompted with this input form:

V-smart [1.0.01]

Data for column/block 1

Data in column/block 

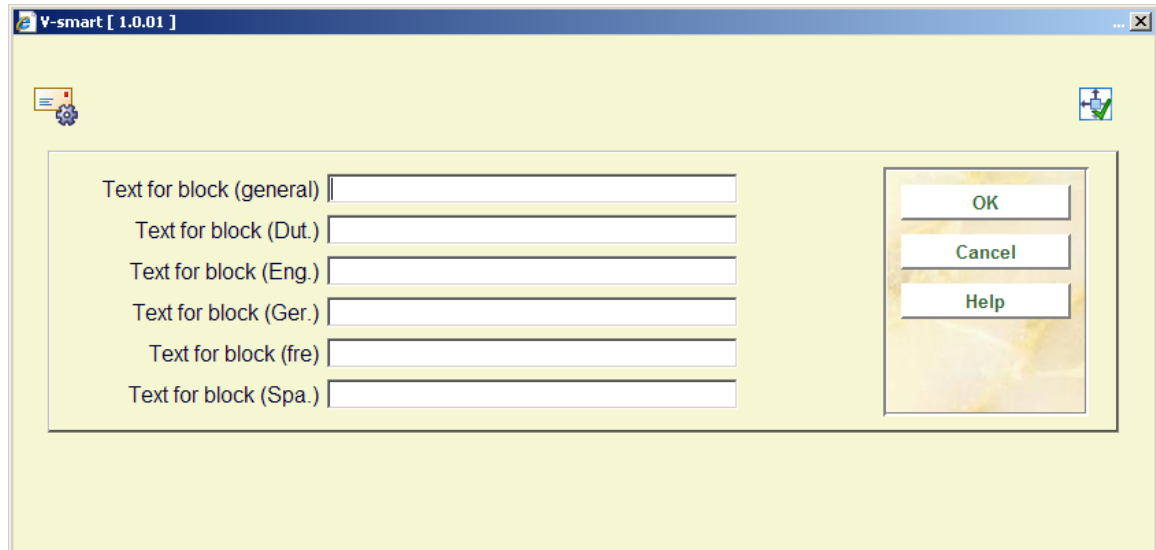
OK

Cancel

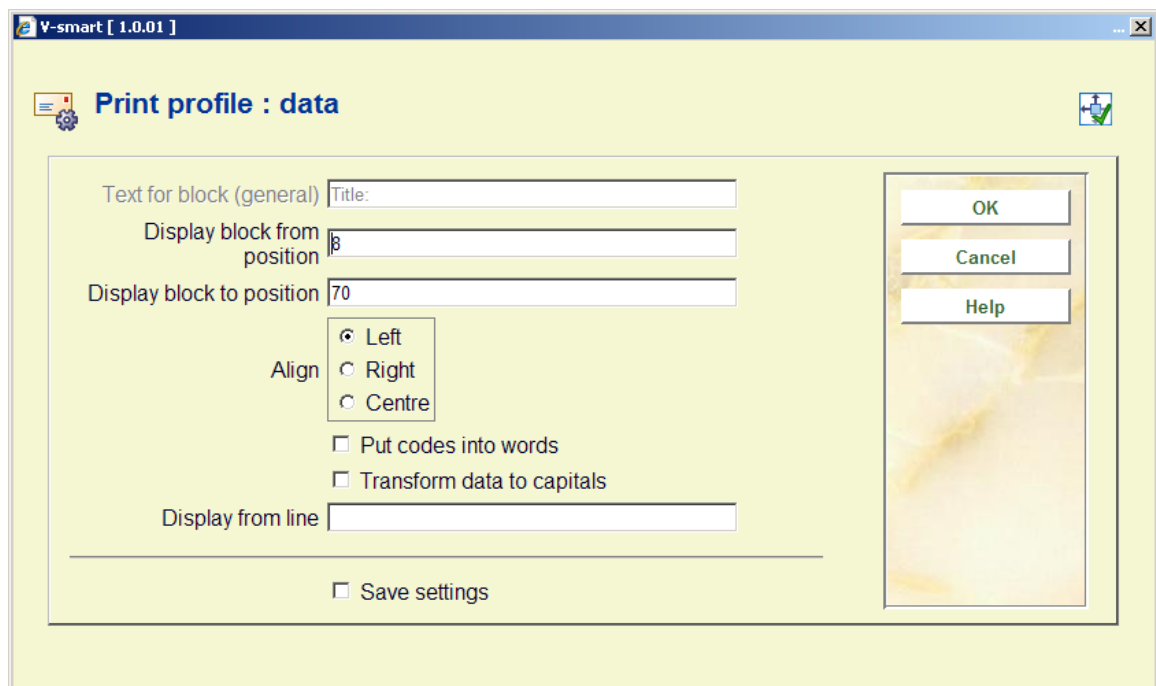
Help

Choose the appropriate data element from the dropdown list and click **OK**.

The next input form allows you to define labels (Blocks) or headers (Columns) for the chosen data element in several languages:



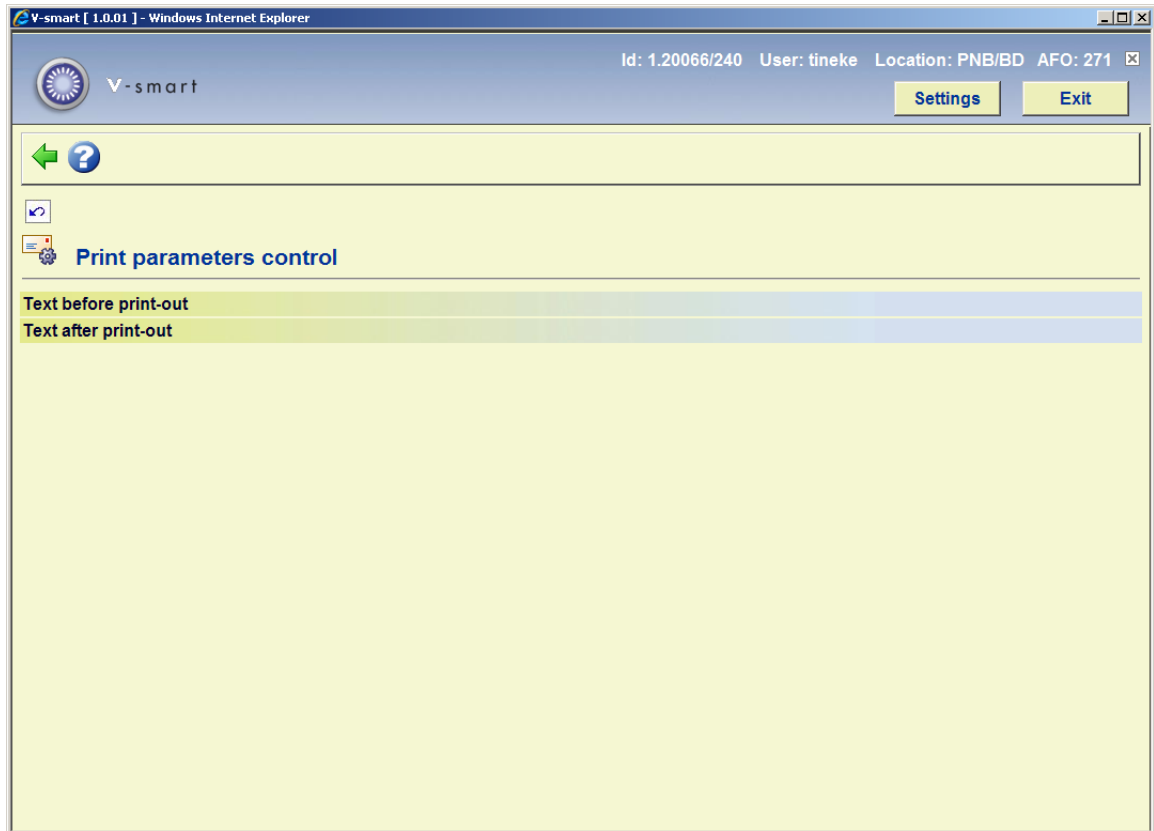
After which you are prompted for more parameters regarding the positioning etc. of this data element:



The system will repeat this prompt for the number of blocks/columns you specified in the earlier screen.

When you have finished the system will display a screen similar to the example below. You must now complete the layout by amending the following sections.

Free text: when you select this a new menu is displayed:



Choose **Text before print-out** to define the text that will appear at the beginning of a letter. Again you can do this for several languages:



After choosing a language you are presented with an editor window:



Enter texts as appropriate and repeat this for as many languages as necessary. When you have finished this section click **Cancel** to return to the menu. Then repeat this for **Text after print-out** to define the text that will appear at the bottom of a letter.

Valid codes to be used here are:

- **\$\$DATUM:** To add 'today's' date to a letter.
- **\$\$LEVERANCIER:** To add the Supplier name and address to a letter. This will be taken from the definition in AFO 241.
- **\$\$AANVRAGER:** To add the Requester details to a Requester notice. The details will be taken from the definitions in AFO482 – Borrower Address SSP Print Setup and Borrower Address Priority Setup.
- **\$\$SHIPTO:** To add the Ship to address to a purchase order. The \$\$SHIPTO variable must not contain trailing spaces. The information as defined in AFO 244 – Destinations – ShipTos will be used. You can choose to sort printed purchase orders by Ship to address (AFO 272 Generate new page when Ship to address changes).

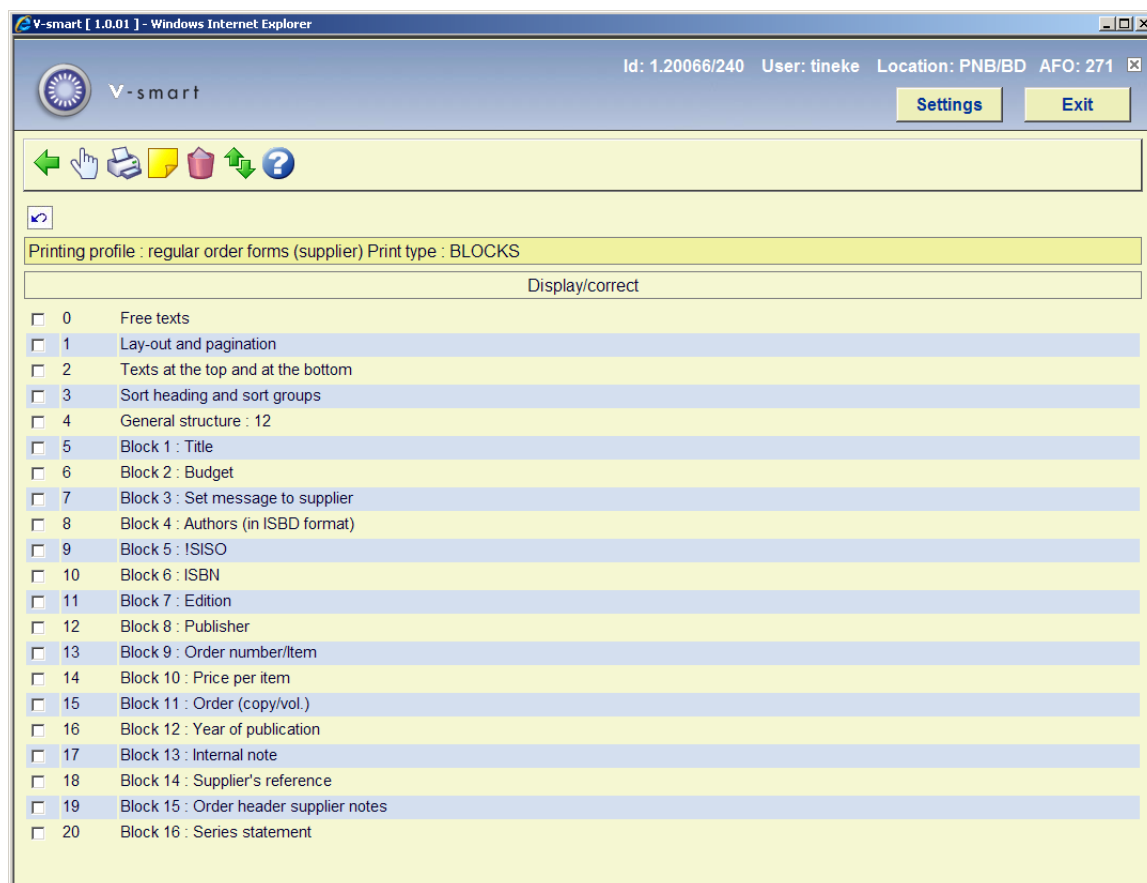
- **\$\$ADRES:** When you don't use multiple addresses but just want the address from AFO 617, use the variable \$\$ADRES instead of \$\$SHIPTO.

Note

Variables must always be the last thing on the line which will be printed. If you add text after a variable it will just not appear on the printout.

271.3.1.1 Updating an existing layout

When you select an already defined type of printout from the overview screen, the system will display a screen as shown in the example below immediately:



Options on this screen

Modify/display: Select a line and click on this icon to edit the chosen part of the layout.

Print: The standard form for generating output will be presented. You can print the complete definition of the defined layout.

Note:

This will not print a sample letter based on the layout, just a listing of all the definitions that have been made.

Comment: To add a free text explanation to this layout definition.

Delete: To delete the whole definition of this layout. You cannot delete lines from the 'Blocks' (or 'Columns') definition.

Exchange places: Select two lines from the 'Blocks' (or 'Columns') definition (by using mouse and the CTRL-key) to swap their positions. This can be useful when you have made a mistake, because you cannot delete lines from the 'Blocks' (or 'Columns') definition.

Note:

Line 4 (**General structure**) determines the number of lines ('Blocks') or ('Columns') that will actually be printed. So more 'Blocks' (or 'Columns') can be defined than are set in this parameter. Make sure you amend this setting when you wish not to print all 'Blocks' (or 'Columns'). Again this can come in useful when you have made a mistake: use the **Exchange places** option first to move a no longer required data element to the last position. Then decrease the number specified in **General structure**.

See the previous section for information on the various fields how to edit them.

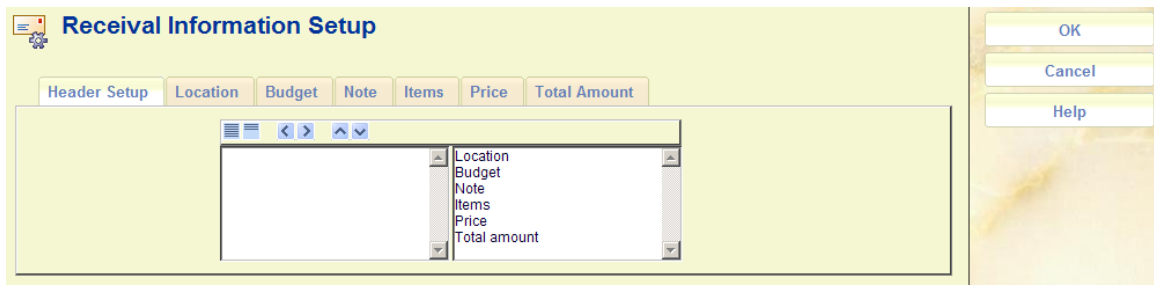
271.3.1.2 Define layout for Receival information

When you select the data element *Receival information* in one of the blocks (most likely for the layout of the form to be printed for receipt of individual items), there will be additional information that can be defined.

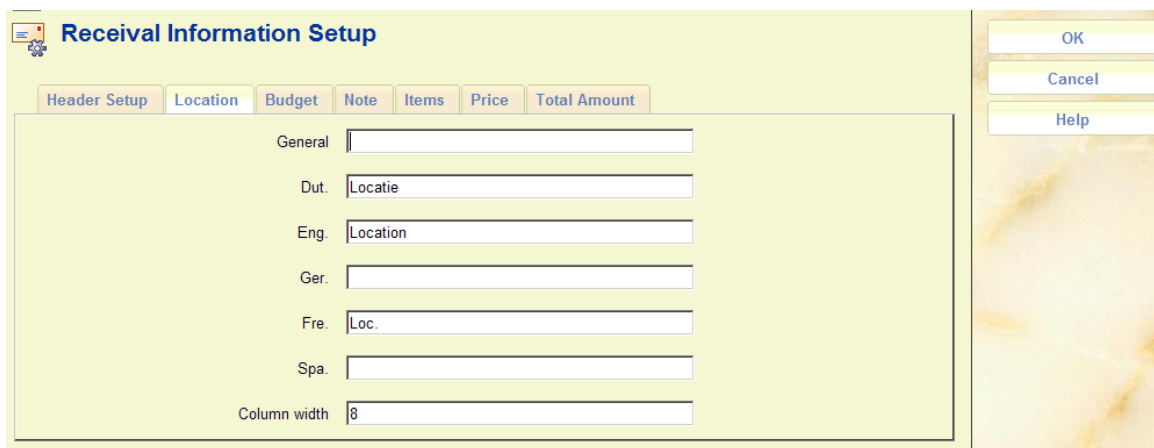
Note

This works best for a "block" type layout. Receival information will be displayed as an individual matrix. You can define this for a "column" layout too but probably will not look very good.

After clicking **OK** on the third form, you will be presented with yet another form:



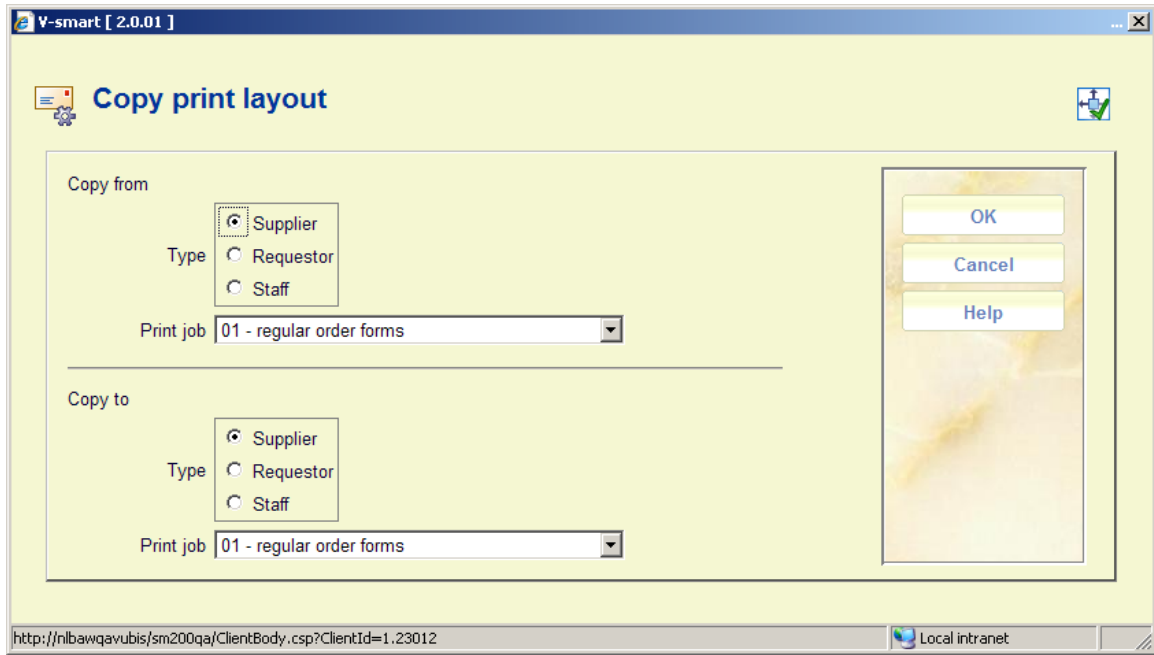
On the first tab you can select the blocks to be printed and the order in which they should appear.



On the other tabs you can define wording in each language as well as the column width for each element. This is the column width within the Receival information matrix.

271.3.2 Copy profile

Copy profile: Use this option to copy profiles. After selecting this option the following form will be displayed:



Select the appropriate profiles to copy from and to. After clicking **OK**, the screen will be redisplayed (the system has copied the data from one profile to the other).

271.3.3 Define layout for partial order When you select the data element *Formatted partial order line* in one of the blocks/columns, there will be additional information that can be defined.

This data element has some special properties. From the point of view of the printing setup, when compared with other data elements, this is a single field which may be output as a column or block in the regular way.

However, this data element may itself be made up of several individual fields from the partial order level for a given order, as described below.

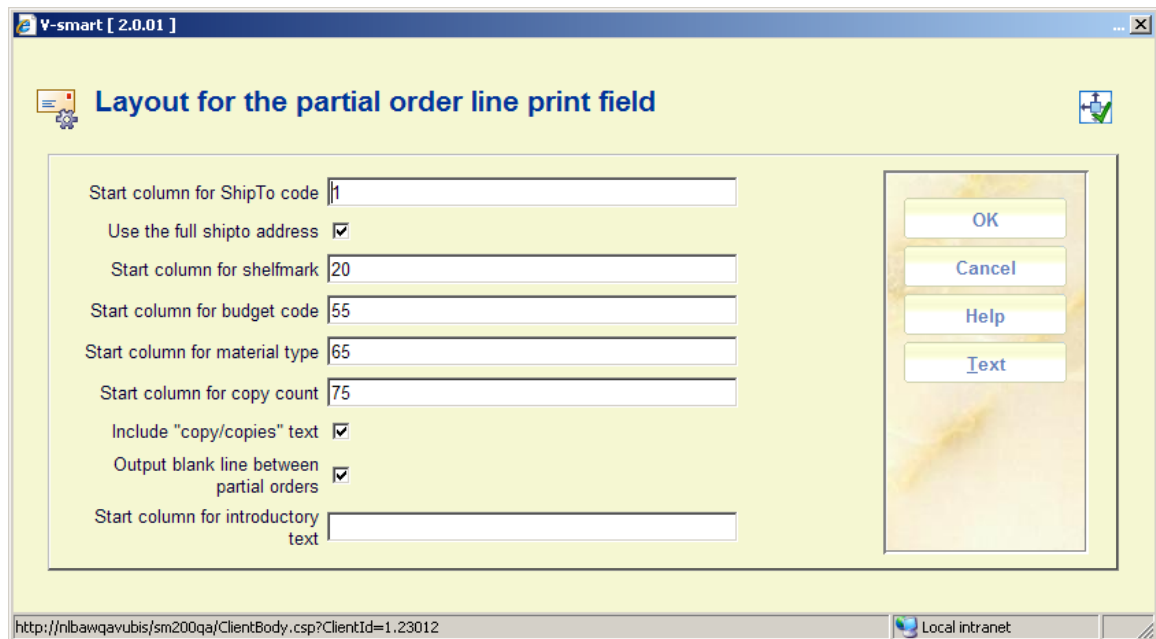
For example, the contents of the "*Formatted partial order line*" itself might be made up of the "shipto" location, the shelfmark and the number of copies. Suppose for example we had an order with 3 partial order locations, with shipto codes "Alpha, Beta and Gamma", with associated shelfmarks "123.45", "Oversize 123.45", "123.54" respectively (i.e. in this perhaps unusual case we have 3 different shelfmarks). Then the output field for the "Formatted partial order line" would be made up of three lines, such as (for example):

Alpha	123.45	2 copies
Beta	Oversize 123.45	1 copy
Gamma	123.54	1 copy

The *Formatted partial order line* data element allows you to print partial order line information in a tabular form.

The *Formatted partial order line* may be added to any order print form, BUT the actual content of this data element is defined for the Acquisition system as a whole. If this data element is used on several different notices, then its structure and form is identical on each output.

You need to make this generic definition with the option **Define layout for partial order** on the main screen. After selecting this option an input form will be displayed:



The screenshot shows a dialog box titled "Layout for the partial order line print field" from the V-smart 2.0.01 application. The dialog contains the following fields and options:

- Start column for ShipTo code:
- Use the full shipto address:
- Start column for shelfmark:
- Start column for budget code:
- Start column for material type:
- Start column for copy count:
- Include "copy/copies" text:
- Output blank line between partial orders:
- Start column for introductory text:

On the right side of the dialog, there are four buttons: OK, Cancel, Help, and Text. The dialog is displayed over a browser window showing a URL and a "Local intranet" icon.

For each of these fields, as can be seen in the form above, the column position INSIDE the formatted field is defined. If a field is NOT required, then the output column can be set to 0 or blank.

Fields on the form

Start column for: use these fields to define the start column for the various elements.

In the above example, the Shipto code appears in columns 1-18, the shelfmark in columns 20-53 and so on. The system automatically reserves 1 blank space between the columns.

Use the full shipto address: When this option is checked the system will output the Full address of the Shipto code, rather than the code itself.

Include copy/copies text: When this option is checked the system will output the copy count (for the partial order) in the form "1 copy" or (17 copies), rather than just the numeric amount.

Output blank line between partial orders: When this option is checked the system will output a blank line to separate out the individual partial orders.

Start column for introductory text is discussed further below.

For output by columns, the above settings will generate an output looking like

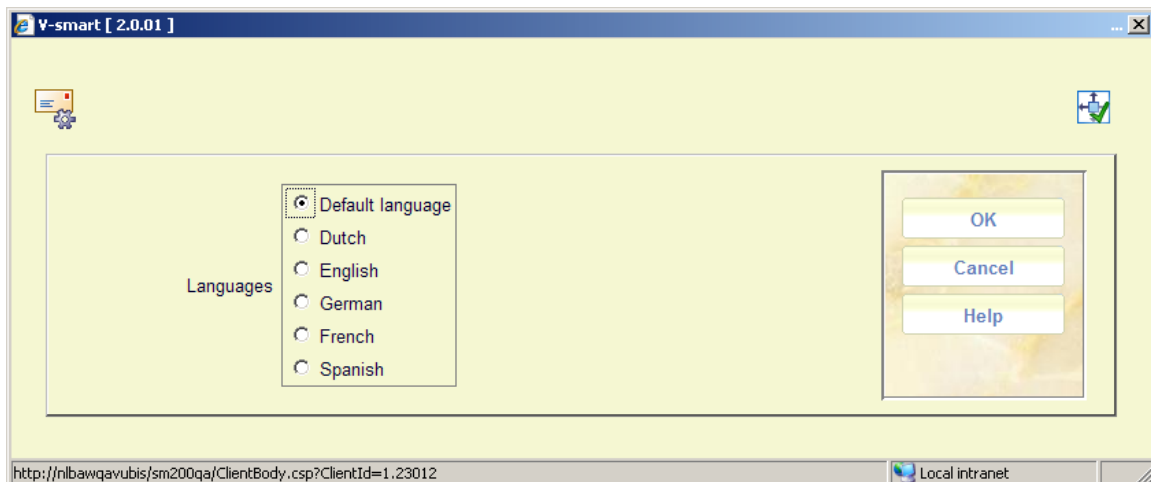
Order number	Title	Shipto	Shelfmark	Budget	Type	No. copies
BRS00018/0001	Test order	Central Library 23, Main Street The City	123.45	16/22	PER	18 copies
		Branch ALPHA Bristol	08.123.45	16/22	REF	1 copy
		Another branch North Bristol	123.45	16/22	ANN	1 copy

The heading “Shelfmark Budget Type No. copies” was created by entering this into the heading for the Formatted partial order field, by manually spacing the heading out.

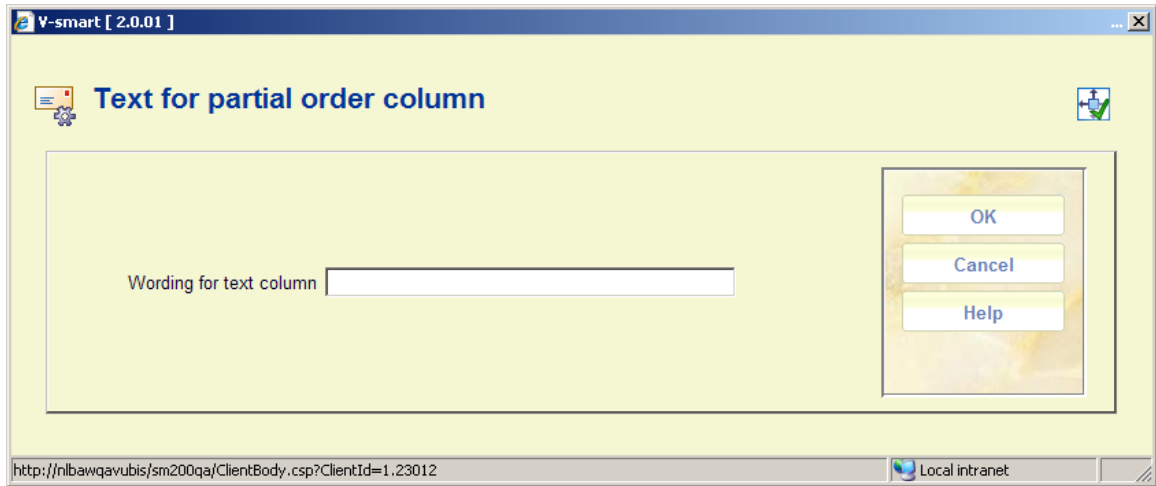
Note that the Full shipto address is split onto multiple lines. Multiple lines may also be generated if the particular data value is too long to fit into the column width defined.

Finally, it is also possible to define “introductory text” for the partial order line. This is most relevant if the data is output as “blocks” rather than columns. The specific text to be shown is defined by using the “Text” button on the input form – which allows you to enter the specific leading text.

This asks you to select a (supplier) language code:



Followed by an input form asking for the introductory text details in the selected language:



This latter function is appropriate for blocked mode, since the label for a block is only displayed once per block and subsequent lines (within a block) start at column position 1 (rather than being indented).

In block mode the above example might look like:

```
Order·number·····:·BRS00018/0001¶
Title·····:·Test·order¶
···¶
Order·line·details···Central·Library···123.45·····16/22···PER····18·copies·¶
·····23,·Main·Street·¶
·····The·City·····¶
¶
Order·line·details···Branch·ALPHA·····03·123.45·····16/22···REF····1·copy·¶
·····Bristol·····¶
·····¶
Order·line·details···Another·branch·····123.45·····16/22···ANN····1·copy·¶
·····North·Bristol·····¶
```

- **Document control - Change History**

Version	Date	Change description	Author
1.0	July 2008	Creation	
2.0	May 2009	new option to define layout for partial order line; changes to layout receipt individual items; new copy option for layouts part of 2.0 updates	
3.0	April 2010	warning note for \$\$variables part of 2.0.06 updates	