AFO 275 - Archive parameters control

275.1 Introduction

AFO 275 enables you to manage the archive parameters in the acquisitions module. These parameters determine how the archiving function works in your system so it is extremely important that these parameters are correctly defined as archiving can result in purchase orders and/or invoices being irrevocably deleted from the acquisitions files.
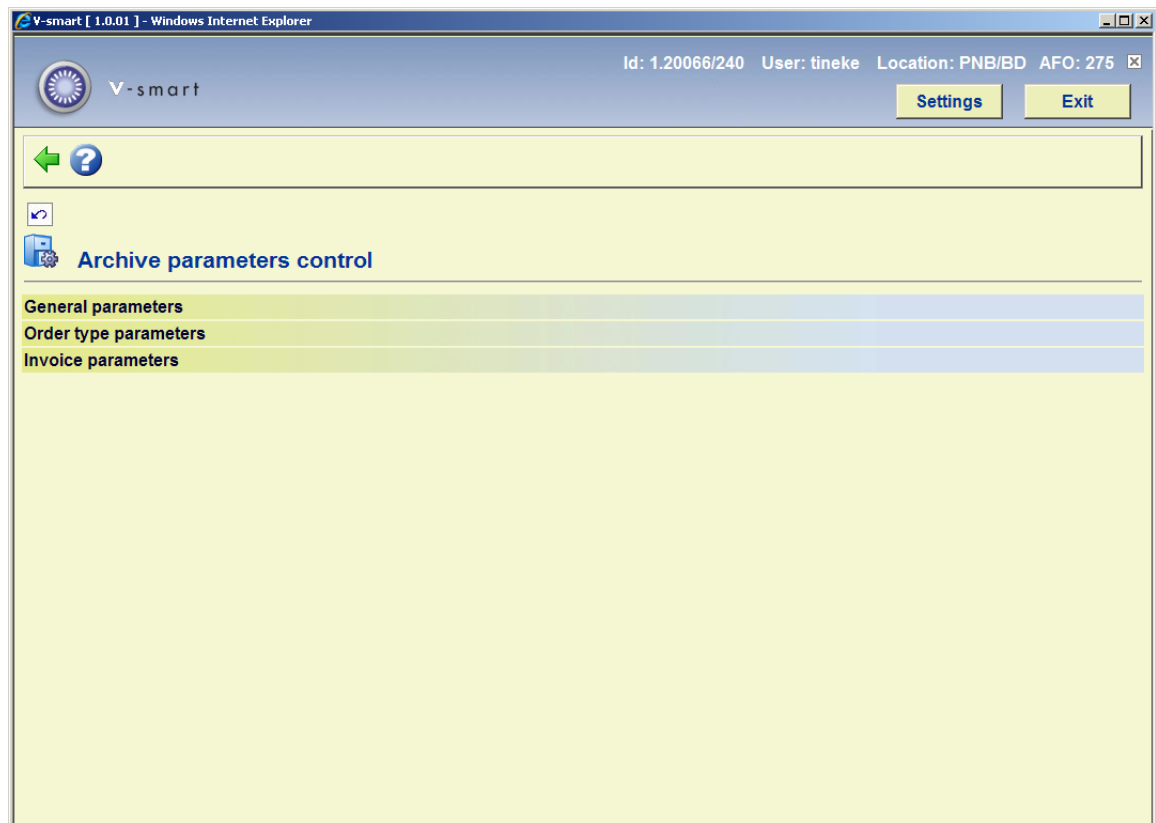
Note

Please read the introduction to AFO 261 (Archive non-cancelled orders) before you define AFO 275.

The system differentiates between three types of archive parameters:

- General parameters which determine the categories to be archived (purchase orders, cancelled purchase orders and invoices) and whether archiving is 'in Vubis' and/or 'out of Vubis'

- Parameters per order type which determine the criteria a purchase order must fulfil before being archived

- Parameters for invoices which determine the criteria an invoice must fulfil before being archived.

When you select this AFO a menu screen will be displayed.

These menu options are described in the following sections.
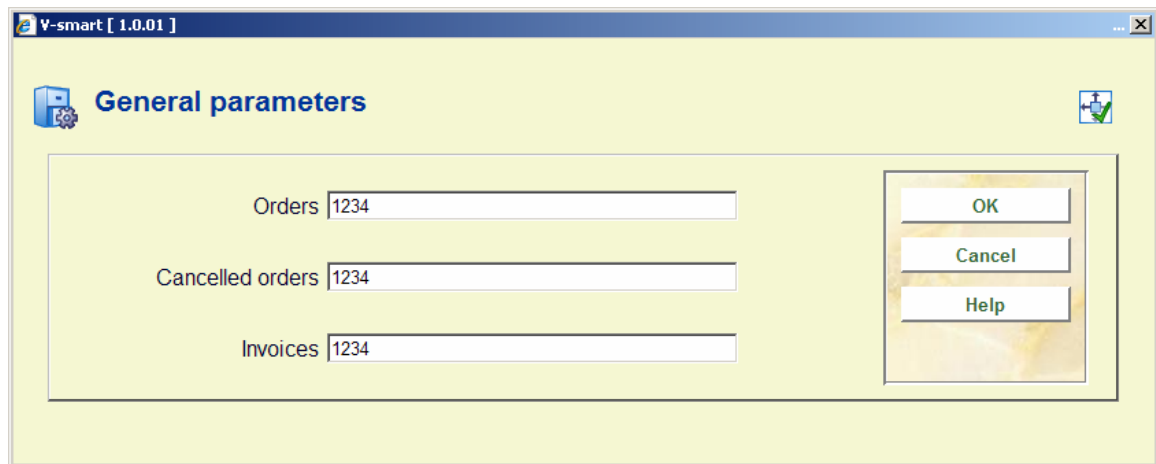
275.2 General parameters

This general parameter determines which processes are available for which categories (purchase orders, cancelled purchase orders and invoices). There are four processes:

- Process 1: Selecting information (on one specific category) which will be copied to an archive file 'in Vubis'

- Process 2: Deleting information on a specific category from the acquisitions/supplier files (after this information has been selected in process 1)

- Process 3: Selecting information on a specific category to be copied to an archive file 'out of Vubis'

- Process 4: Deleting information on a specific category from the acquisitions/supplier files (after this information has been selected in process 3)

Note

You can read more about the implications of these processes in the introduction to AFO 261 (Archive non-cancelled orders).

When you select this option an input screen will be displayed:

For each of the questions you should indicate which of the four processes above should be made available. There are three valid combinations of process numbers which can be entered here:

- 12 : for archiving only 'in Vubis'

- 34 : for archiving only 'out of Vubis'

- 1234 : for archiving both 'in Vubis' and 'out of Vubis'

275.3 Order type parameters

When you select this option a survey screen showing a number of parameters per order type will be displayed. The columns will be empty if no parameters have yet been entered.

These parameters determine the way in which the processes in the previous section are dealt with by the system.

Options on the screen

Copy parameters (+) - with this option you can copy the memorised parameters to another type of purchase order. If you select this option an input screen will be displayed on which you can indicate to which other type of order the parameter should be copied.

Copy parameters to all items - select this option to copy the memorised parameters to all types of purchase orders.

Memorize parameters (+) - select an order type and click on this option to memorise the parameters for this type of purchase order. An 'm' will be displayed in column 1 after the line number. You can then copy the parameters to one type or a range of types of purchase orders using the 'Copy' option.

Choose number (+): After choosing this option an input screen is displayed:

Fields on the screen

Receipt status - this parameter refers to the minimum status of an order before it can be considered for archiving. The following statuses are possible:

- 0: Nothing has been received from the purchase order in question

- 1: The purchase order in question has been partially received

- 2: The purchase order in question has been totally received

Waiting period after receipt - this period is the minimum number of days which must have elapsed since the date of receipt before the purchase order can be archived. The date of receipt is the date after the receipt status on the screen showing the general details of the order in question.

Invoice status - this parameter refers to the minimum status a purchase order must have before it can be considered for archiving. The following statuses are possible:

- 0: Nothing has been received from the purchase order in question

- 1: The purchase order in question has been partially received

- 2: The purchase order in question has been totally received

Waiting period after invoicing - this period is the minimum number of days which must have elapsed since the invoicing date before the purchase order can be archived. The invoicing date is the date after the invoicing status on the screen showing the general details of the order in question.

Catalogue flag - with this parameter you can indicate what checks should be made on the processing of purchase orders received in the catalogue. The following checks are possible:

- 0: Irrelevant (no check)

- 1: The item numbers in the purchase orders are not checked but the BR (bibliographic record) must have at least one call number

- 2: All item numbers allocated via the acquisitions module must be traceable via a call number (i.e. the item numbers must be in the catalogue)

- 3: All purchase orders that have been received must have item numbers and must have been entered in the catalogue

Note

'Catalogue flag' can only be used when the receipt of items is registered by inputting barcodes.

Waiting period after cancellation - this period is the number of days that a purchase order must have been cancelled before it can be considered for archiving.

The following two parameters are only applicable if the system has been configured so that purchase orders are first archived 'in Vubis' and are later archived 'out of Vubis':
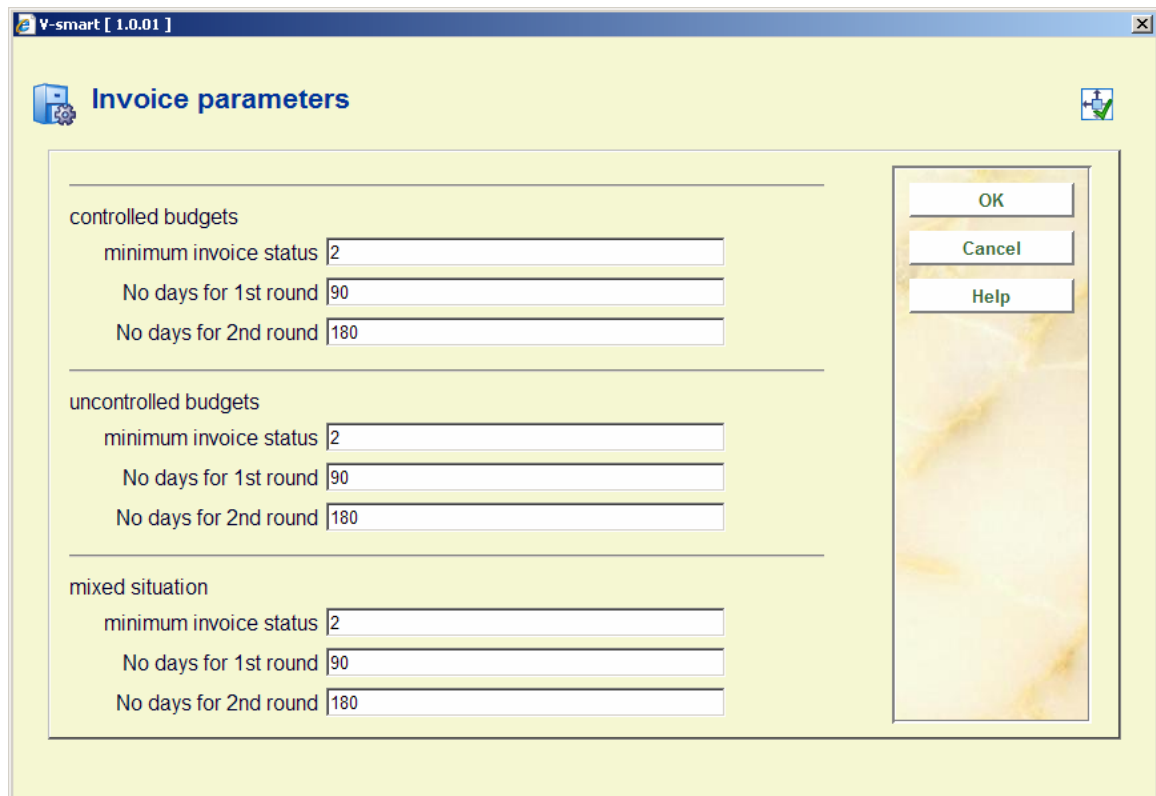
Period on record within Vubis (A2P) - the period entered here in number of days determines how many days a purchase order will be archived 'in Vubis'. After that period the purchase order will be considered for 'transfer' to the archive 'out of Vubis'.

Period on record within Vubis (cancelled order) - the period entered here in number of days determines how many days a cancelled purchase order will be archived 'in Vubis'. After that period the purchase order will be considered for 'transfer' to the archive 'out of Vubis'.

Archive flag - with this parameter you can indicate whether the type of purchase order should be archived. Enter 0 (zero) if the type of purchase order should not be archived; enter 1 (one) if the type of purchase order should be archived regardless of how the parameters described above have been defined.

275.2.4 Invoice parameters

When you select this option an input screen will be displayed:

With this option you can define a number of parameters per invoice type.

The system recognises the following types of invoices for archiving:

- Invoices charged to controlled budgets

- Invoices charged to uncontrolled budgets

- Invoices charged to both controlled and uncontrolled budgets (mixed situation)

Fields on the screen

Minimum invoice status - enter here the minimum status of an invoice before it can be considered for archiving. Four statuses are possible:

1.   The invoice has been input

2.   The invoice has been printed (is no longer in use but nevertheless cannot be adjusted interactively)

3.   The invoice is being processed (this can be used, for example, to indicate that an invoice that the supplier has sent to the library has been passed to the bookkeeping department)

4.   The invoice has been paid in full

Note

These invoice statuses are determined by a parameter that cannot be defined interactively; they have **no** financial implications.

No. days for 1st round - this parameter determines how long an invoice should remain in the acquisitions file before being considered for archiving 'in Vubis'. Enter a number of days.

No. days for 2nd round - this parameter determines how long an invoice should remain in the archive file 'in Vubis' before being considered for archiving 'out of Vubis'. Also enter a number of days here.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	**July 2008**	**Creation**	