

FIRM ORDERING PROCESS

Collection Development **selects** titles they wish to add to the collection

Collection Development **searches** titles in GIL and FIRST SEARCH to **determine that the titles are not owned** by the Library.

Collection Development **searches** titles in OCLC, adds the 939 field containing order info and exports record to their .dat file. If no title is in OCLC a template record is created in GIL & added to the .dat file. If the title is a volume in a monographic set or serial, a request is created from the parent record and is added to the .dat file.

Each evening around nine o'clock the system is programmed to automatically retrieve all of the .dat files located in the ordreq folder in UGALIBS on the g:\ drive. The **records are loaded into GIL** and are assigned a bibliographic number. A report is generated for Acquisitions that sorts the requests by fund code/title.

The order request **queue is printed** each morning for the previous day's requests.

Each request is **assigned a vendor code** by the unit coordinator. The vendor code is written beside each order on the queue, for the ordering clerk's reference.

The ordering clerk obtains the vended queue and then **creates each order** in GIL.

To Create Orders in GIL:

Creating the Order and Checking for Standing Orders:

1. Click on the GIL_QC (Quick Connect) icon on your desktop. Select "Acquisitions" and enter your operator id and password.
2. Click on the GIL_QC icon again and this time open and log in to "Cataloging." Minimize this window - you will need to use Cataloging if you

encounter an order that belongs to a series of books. When this happens, search for the series title in Cataloging to ensure that we don't already have a standing order for the series or to determine if the title is a volume in an analyzed monographic set or analyzed serial instead of a title within a series.

3. In Acquisitions, select "**Orders**" from the toolbar on the left.
4. Click on "**New Purchase Order**," or enter "**Alt+fno**" to create a new order.

Entering the Header Information:

1. On the new order, your cursor will be located inside the "number" box on the header screen. **Always enter an "f"** for "firm order" at the beginning of this number. This is the purchase order number.
2. The "**Type**" field should always be set to "**firm order**."
3. "**Site**," "**Ship To**," and "**Bill To**" Locations should all be set to "**8Acquisitions Firm**" by default. Never change these.
4. After entering an "f" at the beginning of the purchase order, tab until your cursor is in the "**Code**" field in the "**Vendor**" box. Type the vendor code that the unit coordinator has written on the queue beside the request. Tab to the "**Account**" field. If you have made a typing error, you will get an error message telling you that this vendor does not exist in the database. Make any necessary corrections. Enter "**juga-f**" in the "Account" field if you are ordering with "**edibnaf**," "**edibhbf**" or "**bbsbna**" as the vendor code. **For all other vendors, leave the "Account" field blank.**

Adding a Line Item:

1. The line item will contain all of the information about the book you are ordering. You must save all of the information you've entered on the header of the order before adding a line item. Click the "**save**" button or type "**Alt+fa**" to save the order.
- 2.. A "Line Item" option is now available on the toolbar, and an "**Add a Line Item**" button is available on the bottom of the screen. Click this button, or

select "**Line Item**," "**Add**," "**By Bib ID**" from the toolbar, or type "**Alt+l**". A box will appear prompting you to enter the Bib ID for the order. This will be the first item that appears on each order on the queue as the record number. Enter this number into the "**Bib ID**" field and click "**OK**" or press "**enter**".

3. A line with the title will appear on the order - check the title against the title on the order queue to make sure you entered the Bib ID correctly. If you haven't, you will be ordering the wrong book!

Entering the Line Item Information:

1. Highlight the line item, then click "**Details**," or type "**Alt+d**" to bring up the details window for this item.

Entering the price:

1. Select the "**Price**" tab, or type "**Alt+p**". Your cursor will appear in the "**List Price**" field. Simply type in the price listed on the order queue, including the decimal point. Then click the '**Save**' button in the bottom right hand corner, or type "**Alt+s**" to save.

Entering the location and fund information:

1. Now select the "**Copies/Funds**" tab, or type "**Alt+u**."

a) If there is no location and fund information, click the "**Add**" button on the bottom of the screen, or type **Alt+a**.

b) If a default location and fund are already in place, you can check the order queue to make sure they are correct for this order.

c) If the location or fund needs to be changed, highlight the current location/fund line, then select "**Edit**" from the bottom of the screen, or type **Alt+i**.

2. First, select or change the intended location. This is listed in the "**Loc**" field on the printed order queue.

- a) Tab down and enter the correct number of copies (the default is "1", which is always the case for firm orders).

 - b) Tab to the "**Ledger**" field, and hit the **down** arrow on your keyboard once to select the first "**Ledger**" option, which is the only one used for firm orders. The ledger name will look similar to this: FYO5 (1041GT26600084310).

 - c) Tab to the "**Fund**" field. Enter the fund code listed for the item on the order queue. If it is listed as "**print**," you will enter only a "**p**" after the fund. For example, "1AmLit print" on an order queue is entered as "1amlit p." After you've entered the fund press "**Enter**" and the program will indicate if you've entered the code correctly or not.

 - d) All fund codes can be entered manually except for "1afhis p" and "1jrl/drm p." These need to be selected from the list of codes because of a software glitch.

 - e) To do this, select the **yellow folder icon** beside the "**Ledger**" field. Several options will pop up: always select the first ledger on the list, and do so by clicking on the plus sign in the box to the left of that ledger.

 - f) Keep clicking on the first plus sign option available until you get into the '**1 Time**' funds, which are always used for firm orders.

 - g) Scroll through the list until you've found the correct fund. Both "Afhis print" and "Jrl/Drm Print" are listed under the "Humanities" header.

 - h) "Afhis" is under "History" and "Jrl/Drama" is under "American/English Lit."
3. When you have entered the fund and location for the item you are ordering, click "**Save**" and then "**Close**," or **Alt+s** and **Alt+c**.

4. If you have changed the original location of the item (from '1 on Order for Stacks' to 'Georgia Room,' for example), there will now be two lines on the fund/location screen - you will need to highlight the old, incorrect information and click "**Delete**," or type **Alt+l**.

Setting defaults:

1.. Setting defaults will save a lot of time when creating orders - simply scan the pages of the order queue to see if a vendor or fund (or both) recurs many times. You can reset your defaults anytime you come to a new block of orders that have the same vendor or fund. **To set the defaults**, click on the red, white and blue puzzle icon at the top of the screen (it is the fourth icon from the right) and the defaults screen will appear (it will take a few moments for the screen to load).

2. When the defaults screen appears, it will open on the "**Purchase Order**" tab. This is where you can set your vendor code default. Type the vendor code into the "**Vendor Code**" field, then click the box with "..." that will pop up beside the field. This will move your cursor down into the "**Account**" field - clicking the "..." box is the only way to do this; tabbing down will not work. Also, if you do not click that box after entering the vendor code, the default won't be saved.

3. If the default vendor code you are entering is an "edibnaf," "edibhbf" or "bbsbna" code, you need to enter "juga-f" in the "**Account**" field. Otherwise, leave this field blank.

4. To set the fund/location defaults, click on the "**Line Item Copies/Funds**" tab on the default screen. If you are changing the location default, you will have to clear the current default before entering the new location and fund. After clicking "**Clear**," close the default setting screen, and then reopen it. If you are only entering a new fund default, you do not need to do this; just change the fund as you normally would, selecting it from a list.

Entering Notes:

1. To enter any notes that need to appear on the order, select the "**Notes**" tab or type "**Alt+n**".

- a) There are two fields on the Note tab: "**Instructions to Vendor**" and "**Notes**." If there is information a vendor needs to know (like a catalog number, preference for hardback or paperback, etc.), enter those notes in the first field called "**Instructions to Vendor**".
- b) If there is information only the library staff needs to know (like instructions not to bind the book when it arrives, or a note that this is an added location, added copy, or added volume, etc.), enter it in the larger second field called "**Notes**".
- c) Some notes will need to go to both the vendor and library staff - volume numbers, for example, and descriptions of the type of item being ordered ("text" or "audio cd," etc.).
- d) Always enter a priority number for rush orders (5 or 7) first, then volume or material information (such as text or cd-rom), and then any treatment information ("do not bind," etc.)
- e) Enter all notes that appear on the printed order queue, except for those with "bn>" in front of them.

Entering "Notify" Information:

1. Sometimes a certain person has asked us to order an item - a professor who needs the item for research, for example. The person who has requested the item will want to know when it arrives. If the notes on the order queue include information about someone who has requested the item, select the "**Delivery Options**" tab, or type "**Alt+d**". In the "**Requestor**" field, enter the name of the person and any contact information provided, then click "**save**" or type "**Alt+s**".
2. When you have entered all the information for the line item, select "**Save and Close**," or type "**Alt+fa**" to return to the purchase order.

Ordering more than one volume or an item with multiple parts:

1. If you are ordering more than one volume on a single order, or an item that comes with additional parts (as in, a book that comes with a cd-rom, etc.) you will need to create another line item on the order.

a) Enter additional line items the same way you created the first, using the same Bib ID (it should automatically appear in the Bib ID box when you choose to add another line).

b) Highlight the second line item and enter any needed information in the Details window. The price information will normally be input for only the first line item, leaving the price of all additional line items at zero. There are exceptions; the notes field will tell you if each item being ordered has its own price and needs to be entered separately.

c) The location/fund needs to be changed/entered on each line item, so that all locations/funds on the order match.

d) In the notes field, you will have to enter notes that differentiate the items on the order: if there is a book and a cd-rom you'll enter "text" in the notes field on the line item for the book (in both the "instructions to vendor" and "notes" fields), and "cd-rom" in the notes fields on the second line item.

**If you have 2 audio cds, these will be entered on only one line item; simply note that there are "2 audio cds" in both notes fields.

Approving the order:

1. When all line items for the order are entered with the correct information and appropriate notes on each, you are ready to approve and send the order, either to the EDI file for the electronic orders, or to the printer queue for all others.

a) Select "**Order**" from the purchase order menu, and then "**Approve**" or type "**Alt+oa**". A Box will pop up with four options that can be checked.

b) If the order is being sent **via EDI**, you'll need to uncheck the "send to printer" option before selecting "**OK**" to approve. You can hit the tab key twice and then hit the space bar to do this without moving your cursor.

c) Some orders that are not sent to EDI also do not need to be printed because the unit coordinator can order them online rather than mailing them to the vendor. The vendors to which this applies are:

1. Bookhouse
2. Alibris
3. Amazon
4. Harrassowitz

d) Occasionally there are many Bookhouse or Harrassowitz orders in the queue, and in this case, go ahead and print them. If there are just a few the unit coordinator can order them online, but if there are many this will take too much time. If you see a Bookhouse or Harrassowitz order, check through the queue to see if there are many others before deciding to send it to the print queue upon approval.

2. After you have approved the order, write the order number on the order queue for reference. Then click "**Save and Close**," or type "**Alt+fv**".

Checking the day's orders:

1. When all of the orders are created and approved, go to the "**Search Orders**" screen in Acquisitions and select "**Create Date**" as the search criteria.

a) Type in the current day's date and all the orders you have created on that date will be displayed. Check the orders to make sure that they all have an "f" in front of their order number.

b) If they do not, open the order, go to "Copy" on the "Order" menu, select "with components re-linked," and a new order with all of the

same information will appear.

c) Type an "f" in front of the copy's order number and save and approve it (you will get a warning about a duplicate order; simply select "**Continue Approve**" or type "**Alt+a**").

d) Change the order number written on the order queue to reflect the new order.

e) Save and close the new order, then select "**Delete**" from the "**Order**" menu on the order that was missing an "f".

f) If this is an EDI order notify the unit coordinator that the old version of the order needs to be deleted from the EDI file as well.

Printing and mailing orders:

1. To print the day's orders for mailing, click on the *GIL_QC* icon on your desktop and select "**Reporter.**"

a) Enter your operator id and password.

b) Make sure the check box that says "**Process Reports**" (on the left side of the screen) is selected, and that the check box that says "**Process Notices**" (on the right side of the screen) is **NOT** selected.

c) Click "**Build Notices/Reports**" and the software will retrieve all of the orders that need to be printed.

d) When the "build" process is complete, click "**Run Notices/Reports**" to send the orders to the printer.

e) Do not exit the program until a note appears on the bottom of the screen that says "**Processing Complete.**"

2. Collect the printed orders from the printer. They should be sorted according to vendor.

a) Check for any orders that have multiple volumes or single volume numbers that are **not** the first volume in a set.

b) Sometimes the ISBN that gets printed for these volumes is incorrect. If the ISBN printed on the "volume two" (etc.) line is the same one listed for volume one, mark a line through the incorrect ISBN with a black pen so the vendor won't be confused.

3. Separate the orders according to vendor and place them in envelopes. No postage is needed - simply seal the envelopes and place them in the Acquisitions "Outgoing" box, which is located behind the gift area.

After orders are sent, **materials arrive** at UGA and are unpacked, security stripped, and placed on a book truck for receiving.

Materials are received and invoices are paid in GIL.

Copy-catalogued materials are routed directly to Marking; the remaining titles are sent to Cataloging or other appropriate locations.

Invoice vouchers are printed, attached to the invoices and sent daily to the Library's business office.