3.2   ORDERING MATERIAL

There are different order types for ordering material from a supplier:

- standard orders
- advance orders
- on approval
- blanket orders

Depending on the type of material you can order:

- monographs
- multi-volume monographs
- monographic series items

The procedure for ordering material includes:

- preparing an order
- submitting an order

The ordering procedure can additionally include:

- order cancellation
- entry of supplier's notification

You can order one or more monograph titles from a supplier. You can change the supplier's default mailing address before submitting and sending the order.

You can decide to cancel the ordered material due to unexpected receipt of this material (exchange, gift or subsidy), if claims for undelivered material have not been successful, or on the basis of a supplier's notification stating that the material cannot be delivered.

The supplier can send you a notification about the status of each material which has been ordered (entered, reprint, not yet published). Enter this data in the order item.

3.2.1   Preparing an order

When preparing an order, first specify the order type: standard order, advance order, on approval or blanket order. Then enter general data about the order and afterwards data on individual order items. For each order item, specify the order type depending on the type of material (monograph, multi-volume monograph, monographic series item), enter the price and define the copies and funds. After that the total amount for each item plus total amount of the order are automatically calculated.

Orders are prepared in the **Order** class.

Precondition	Details about the supplier must be recorded in the database of partners, with the following role marked: *Supplier (ACQ).*

Procedure

1. Highlight the **Order** class.

2. Select the **Class / New object** method.

   The **Order** editor will open.

3. Enter general data about the order (see chapter *3.2.1.1*).

4. Enter order item(s) (see chapter *3.2.1.2*).

5. Click the **Total amount** tab.

   The total of the order is calculated automatically, at the same time as you enter prices for order items (see also chapter *3.2.1.2.3*).

6. Save the data.

A number, which cannot be changed, will be assigned to the order. Orders are numbered automatically, in compliance with the setting of the counter for orders (see chapter *11.3*).

Status after preparing an order

Order

- *entered*

Order item

- *order prepared*

Copy

- *order prepared*

What to do next   The prepared order is then submitted and sent to the supplier.

3.2.1.1   Entering general data

Enter general data about the order in the **Order** editor.

Procedure

1. Under "Type", select the relevant order type: *standard order*, *advance order*, *on approval* or *blanket order*.

2. Define the supplier.

   Click the **Supplier** button. The button is linked to the **Partner** class, where partners with the role of suppliers of monographs are also specified. The **Search – Partner** search window will open. Find and select the supplier.

> Tip:
>
> When entering an order, specify the supplier first. Some data is transferred to the order and to order items only if the supplier has already been specified.

By selecting the supplier, the mailing address is also specified. If only home office data has been entered for this supplier, the mailing address is the same as the home office address.

If a department or contact person has been entered for this supplier, the department or contact person will appear on the order. The order will be sent to the relevant department or contact person.

If several departments or contact persons have been entered for this supplier, a window with a list will open, from where you can choose the department or contact person. If you do not choose any department or contact person, the home office address will be used as the mailing address.

The default data about the mailing address can be changed (see chapter *3.7.4*).

Tip:

If you know the supplier symbol, department symbol or contact person symbol, click the icon 🔍 to define the supplier and mailing address.

3. By selecting the supplier and mailing address, the default sending method is defined as the "Sending method". The value can be changed.

The selected value defines the form of the order and method of sending it to the supplier.

Example:

If you wish to send an order to the supplier via e-mail, select *e-mail* for the "Sending method".

4. By selecting the supplier, the default language, in which the document will be written, will be used as "Language". You can change the value.

The selected value defines the language of the order.

5. Under "Priority", select the relevant value.

If you select *urgent*, the priority will appear on the order.

6. Define the data about the expected delivery of ordered material.

Under "Delivery time (days)", the default value defined when entering the data about the supplier will appear. The value represents the number of days it will usually take for the supplier to deliver the material. The value can be changed.

After order submission, the "Delivery date" is calculated by adding the number of days before the delivery time to the order submission date.

7. Enter the number and date of a reference document, e.g. of an on approval delivery note. If you have entered the date, you must enter the reference document number as well.

8. To enter an internal note, which will not appear on the order, click the **Note** button.

Enter the text into the text window and save it.

9. To enter the note that should appear on the order, click the **Order note** button.

Enter the text into the text window and save it.

3.2.1.2   Entering an item

Enter order item data in the **Order item** editor.

You can enter an order item either while or before preparing an order (see chapter *3.1.1*).

Procedure

1. In the **Order** editor, click the **New object** button.

   The **Search – Bibliographic record** search window will open.

2. Find and select the bibliographic record.

   If the record does not exist in the local database, you can download it from the shared bibliographic database (see chapter *2.1.1*).

   If the record does not exist in the local database and you do not intend to download it from the shared database, close the search window by clicking the **Close** button. The **Material** editor will open, where you can enter bibliographic data (see chapter *2.2*).

3. To enter an order item, click the **New object** button in the **Material** editor.

   The **Order item** editor will open.

   Bibliographic data on the material can only be viewed. You cannot change it. The only exceptions are the ISBNs.

   All ISBNs from subfields 010a in a bibliographic record are transferred to "ISBN". Redundant ISBNs can be deleted from the order item.

4. Under "Type" select one of the following values, depending on the type of material: *monograph, multi-volume monograph, monographic series item*.

5. The supplier, defined when preparing the order, will appear under the "Supplier symbol".

   If the order has not been prepared, enter the supplier symbol yourself.

6. Enter supplier's material identification number, e.g. catalogue number.

7. Enter the data to prepare a claim for the undelivered material.

   Under "Claim time limit (days)", the default value defined when entering the data about the supplier will appear. This indicates for how long the order may be delayed. The default value can be changed.

   The order item is placed on the claim for undelivered material once the delivery date has expired, or in view of the last claim date.

8. To enter a note that should appear on the order under the item, click the **Order note** button.

Enter the text into the text entry window and save it.

9. To enter an internal note, which will not appear on the order, click the **Note** button.

   Enter the text into the text entry window and save it.

10. Enter the request priority according to internal arrangements within the library.

11. If you want to check financial situation in individual funds, click the **Funds situation** button.

12. Define copies, funds and percentages of financing (see chapter *3.2.1.2.1*).

    The sum of all the copies entered will automatically appear under the "No. of copies ordered".

13. Click the **Requested by** tab and specify the requestor (see chapter *3.2.1.2.2*).

14. Click the **Price** tab and specify the item amount (see chapter *3.2.1.2.3*). The price per unit can be transferred from any acquisition document item or from fields 996/997 (see chapter *4.1.1.2.1*).

15. To add the item for supplement, click the **Copy item** button.

    An item with the same material and apportionment of copies as the main item will be added to the order. The price of the main item will not be copied to this additional item. If the COBISS.SI-ID in the added item is the same as in the main item, the added item will be coloured blue (except where the COBISS-ID equals 0).

16. Save the data.

Options   The apportionment of copies and funds among departments for an order item can be printed out. Under the order item, select first the **Object / Print** method, and then *Apportionment among departments – order*.

3.2.1.2.1   Entering copies and funds

In the copies table, enter data on copies, funds and percentages of financing.

You can enter the data yourself, or you can define the data by using the prepared item template(s).

Procedure   1. In the item editor, click the **Copies table** button.

   A table will open, where each row represents the data for one copy. Above the table, the total number of copies and the number of copies by individual departments are displayed.

Tip:

The fastest way to create an order item is by using a prepared item template. Click the **Apply template** button and select an item template (it is possible to select several templates simultaneously).

---

2. To enter a row for a copy, click the **Insert row** button.

    A window will open, where you can define the number of rows that you wish to insert. You can either insert a blank row or copy a row.

3. Select relevant values from the drop-down lists under "Location", "Shelving location" and "Purpose of acquisition".

4. If you have selected *exchange* as the purpose of acquisition, select the partner symbol from the drop-down list to define the exchange partner. You can choose from active partners with an exchange partner role specified.

5. Specify the fund(s) that will be used to pay for the ordered material. Only active fund(s) can be selected.

> Note:
>
> *When a home library performs services for a certain faculty, it must, when entering an order, always define the fund under which the relevant faculty is entered as a financier. In this way, the address of this faculty will appear as the invoice recipient's address on the documents in the COBISS3/Acquisitions module.*

6. Enter the percentage of financing for the selected funds.

    Total percentage of funding must equal 100 for each copy.

7. To enter the data on the next copy, repeat the steps 2 to 6.

8. Save the data.

The copy number and status are defined automatically in the copies table.

> Note:
>
> *Specify funds and percentages of financing only when purchasing material.*

3.2.1.2.2   Defining a requestor

Enter one or more requestors and the method of notification about the received material.

Procedure

1. In the item editor, click the **Requested by** tab and then the **New object** button.

    The **Requested by** window will open.

2. Click the **Member** button.

    The **Search – Member** search window will open.

3. Find and select the member.

4. Tick the check box "Send notification" if you want to notify the requestor about the receipt of the material that has been requested.

5. Under "Sending method", select the form of notification and sending method.

The sending date will be automatically recorded when you submit and send the notification about received material.

3.2.1.2.3   Amount calculation and conversion of foreign prices

Click the **Price** tab in the item editor and enter the following data:

- price per unit
- discount rate (percentage)
- tax rate, by selecting the relevant value from a drop-down list of tax rates; for a library under another tax system, IZUM sets up a code list of tax rates in the configuration file
- foreign price per unit, by selecting the relevant currency from the currency list
- price note

The following amounts for the item are calculated:

- value before VAT and discount = number of copies X price per unit
- discount = value before VAT and discount X discount rate
- tax base = value before VAT and discount – discount
- VAT = tax base X tax rate
- amount = tax base + VAT
- amount per unit = amount : number of copies

The total of the acquisition document is the sum of the item amounts:

- value before VAT and discount
- discount
- VAT
- total
- foreign amount if the same currency has been selected for all items

In the editors **Order**, **Delivery note** and **Invoice** and in the editors for their items, you can view the advance paid (either in domestic or foreign currency).

In the **Invoice** editor, you can enter the amount of overpayments (in domestic or foreign currency) that you wish to use when paying the invoice. Based on this, the following amounts will be calculated:

- amount due if the total is bigger than the advance and overpayment amounts
- credit balance if the total is smaller than the advance and overpayment amounts

The remaining credit balance is added to the overpayment of the supplier.

In the VAT structure, the following data is shown for each of the tax rates:

- VAT rate

- tax base
- VAT

In the editors for acquisition documents, it is possible *to convert foreign prices into domestic currency*.

Procedure

1. In the editor for acquisition documents, click the **Convert to domestic currency** button.

2. Enter the exchange rate in the window for conversion to domestic currency.

3. Enter the date of the exchange rate.

4. Tick the "Convert to domestic curr." check box.

5. Click the **OK** button.

3.2.2   Adding an item to an order

On the prepared or new order, you can place an entered order item or an order item that has the status of the request approved for purchase.

Precondition   The order item must have the status *entered* or *request approved*.

Procedure

1. In the **Order item** class, find and select the order item.

2. Select the **Object / Add to order/Transfer to another order** method.

   The **Search – Order** search window will open, where you can choose only from entered orders. If you have specified the supplier for the item, the search will be narrowed down to orders for the selected supplier. You can change the search criteria.

3. Find and select the order you wish to add the item to. If you wish to add the item to a new order, close the search window by clicking the **Close** button.

   The item will be added to the selected order, for which the **Order** editor will open.

4. Continue the order preparation procedure (see chapter *3.2.1*).

3.2.3   Adding several items to an order, using the selected template

You can place item(s) on an order, using the selected item template.

Precondition   The order status must be *entered*.

Procedure

1. In the **Order** class, find and select the order.

2. Select the **Object / Add items using the selected template** method.

A window will open, where you can add order items.

Select one of the item templates prepared in advance under "Item template". Data on copies, funds and percentages of financing will be transferred from the selected item template to the copies table of the order item.

Click the **Continue** button.

The **Search – Bibliographic record** search window will open.

3. Find and select the bibliographic record. You can select one or more bibliographic records.

The **Order item** editor will open.

This editor, however, will not open if any acquisition document item has been entered under the found record before. In such a case, the **Material** editor will open instead. To enter an order item, click the **New object** button.

If the record does not exist in the local database, you can download it from the shared database (see chapter *2.1.1*).

If the record does not exist in the local database and you do not intend to download it from the shared database, click the **Close** button to close the search window. Then the **Material** editor will open, where you enter the bibliographic data (see chapter *2.2*). To enter an order item, click the **New object** button.

4. Check and, if required, supplement the order item data (see chapter *3.2.1.2*).

5. Save the data.

A window will open, where you can add order items.

To enter a new order item, repeat the described procedure.

3.2.4   Preparing an order on the basis of the material

The order preparation procedure can be started for the material that has been placed on the workspace first. For the material, prepare an order item, which can be added either to a prepared or to a new order.

Procedure

1. In the **Material** class, find and select the material.

2. Select the **Object / Create order** method.

The **Search – Order** search window will open.

3. Find and select the order. If you wish to prepare a new order, close the search window by clicking the **Close** button.

The item will be prepared and added to the selected order, for which the **Order** editor will open.

4. Continue the order preparation procedure (see chapter *3.2.1*).

3.2.5   Transferring an item to another order

An order item can be transferred from a prepared order to either another prepared order or to a new order.

Precondition   The status of the order item must be *order prepared*.

Procedure   1. In the **Order** class, find and select the order.

2. In the list of objects linked to the order select the item that you wish to transfer. You can select one or more items simultaneously.

3. Select the **Object / Add to order/Transfer to another order** method.

    The **Search – Order** search window will open, where you can choose only from entered orders. If you have specified the supplier for the item, the search will be narrowed down to orders for the selected supplier. You can change the search criteria.

4. Find and select the order you wish to add the item to. If you wish to add the item to a new order, close the search window by clicking the **Close** button.

    The item will be added to the selected order, for which the **Order** editor will open.

5. Continue the order preparation procedure (see chapter *3.2.1*).

3.2.6   Viewing the amounts of unsubmitted orders by funds

You can view the value apportioned by funds of all the entered orders that have not been submitted and sent to suppliers.

Procedure   1. Select the **Order** class and select the **Class / Show the order amounts by funds** method.

    The **Search – Order** search window will open.

2. Find and select order for which you would like to prepare an overview. Unsubmitted orders have the status *entered*.

    A window will open where the amount available and the amount tied to unsubmitted orders can be viewed for each fund. A list of numbers and amounts of unsubmitted orders follows.

The apportionment of the amount by funds can be printed out. To do this, highlight the **Order** class and select the **Class / Send** method. The **Search – Order** search window will open, where you find and select the orders, for

which you wish to print out the report. Select *Order amounts by funds* in the window for selecting a report definition.

3.2.7   Deleting an order

You can delete an order and order items until you submit and send the order to the supplier.

Precondition

You can only delete orders that have the status *entered*. Delete the order items before deleting the order.

Procedure

1. In the **Order** class, find and select the order.

2. Select the **Object / Edit** method.

   The **Order** editor will open.

3. Highlight the item and click the **Delete** button.

   The item will be deleted from the order.

> Note:
>
> *If you delete an item from an order, this does not mean that the item will be deleted from the database as well. For deleting an item from the database see chapter* 3.1.3.
>
> *In the configuration file, a parameter can be set, which allows deletion of an item from the database when deleting it from an order.*

4. Repeat step 3 for all order items.

5. Save the order, which contains no items now.

6. Select the **Object / Delete** method.

Status after deleting an order

Order item

- *entered*

Copy

- *entered*

3.2.8   Submitting and sending an order

When submitting an order, the current date becomes automatically recorded as the order submission date first. Then, depending on the selected sending method, the order is either printed out or sent to the supplier by e-mail.

In funds selected for order items, the financial means are reserved: the amount tied to orders increases whereas the amount available decreases.

If funds have not been specified under order items, the order total amount is recorded in the unallocated financial means fund with the designation *UF*.

The number of fields 996 created for each item equals the number of copies ordered.

Precondition   The supplier and mailing address have been specified for the order. Order items have been entered.

Procedure   1. In the **Order** class, find and select the order.

2. Select the **Object / Submit and send** method.

The current date will be automatically entered to the data about the order, under "Submitted".

The expected delivery date is calculated by adding the delivery time in days to the order submission date.

The **Overview and sending of created report** window will open, from where you can send the order to predefined or changed destinations. In the *Basic Guidelines COBISS3 User Manual* you can find how to send a report (see chapter *4.5*).

A new field 996 with the following data will be prepared for each ordered copy:

- to "Sublocation (d\l)", the library department ID will be transferred

- to "Shelving location (d\i)", the shelving location will be transferred

- "Status (q)" of the copy will get the value *1 – ordered*

- to "Status date (t)", the submission date will be transferred

- "Acquisition type (v)" will get the value *a – purchase*

- to "Purpose of acquisition (w)", the purpose of acquisition will be transferred

- to "Order (x)", the order number and date will be transferred

- to "Supplier (2)", the supplier symbol will be transferred

Status after submitting and sending an order

Order

- *submitted*
- *expected* (Receipt status)

Order item

- *ordered*

Copy

- *ordered*

Field 996

- *1 – ordered*

Options   You can submit all prepared orders simultaneously. Highlight the **Order** class and select the **Class / Submit and send** method. From the list, select the orders that you wish to submit and send.

What to do next   After you receive the ordered material, prepare a delivery note.

3.2.8.1   Submitting and sending an on approval order

You can submit an order entered on the basis of an on approval delivery note (order type: *on approval*) but usually you do not send it to the supplier. The canvasser takes his/her filled in on approval delivery note and the books that you did not order.

If you send the order to destinations, the Order form is prepared, where quantities are given in the same form as on the on approval delivery note, e.g 1+5. This means that in addition to 1 sample copy, which you already have, you order 5 more copies. The procedure of submitting and sending the order is the same as with other order types.

On submitting this order, a delivery note will be automatically created. Order items are transferred to the delivery note, where one copy is entered under each item (see chapter *3.4*).

3.2.8.2   Sending an EDI order

Interchange of electronic documents is regulated by the UN/EDIFACT standard (United Nations Electronic Data Interchange of Administration, Commerce and Transport). You can send an EDI order, made on the basis of this standard, to the supplier.

Before starting to send EDI orders, a library must:

- acquire a global location number (GLN) that indicates legal, physical and functional entities

- provide IZUM with this number; IZUM will enter it into the configuration file

- enter supplier's GLN into the partner database; partner data maintenance is dealt with in the *COBISS3/Application Administration User Manual* (see chapter *3.1.2.3*)

Precondition   An ISBN number must be defined for all order items.

Procedure   1. In the **Order** class, find and select the order.

                      2. Select the **Object / Send EDI order** method.

                         The sending date will be transferred to order data, under "Note".

                         The **Overview and sending of created report** window will open, from where you can send the order to predefined or changed destinations. In the

Basic Guidelines COBISS3 User Manual you can find how to send a report (see chapter *4.5*).

3.2.9   Adding an item for supplement

Holdings data for each copy is stored in one field 996. If you have ordered and received a set, which represents one copy in the COBISS3/Acquisitions module, although it will be accessioned in several fields 996 in the COBISS3/Holdings module, add a new order item for the additional field 996 to the submitted order.

Precondition   The order status must be *submitted*. The received copies have not been recorded under the order item yet.

Procedure   1. In the **Order** class, find and select the order.

2. Select the order item in the list of objects linked to the order.

3. Select the **Object / Copy item for supplement** method.

An item with the same material and apportionment of copies as the main item will be added to the order. The price of the main item will not be copied to this additional item. If the COBISS.SI-ID in the added item is the same as in the main item, the added item will be coloured blue (except where the COBISS.SI-ID equals 0).

Options   You can add the item for supplement also by clicking the **Clone item** button in the **Order item** editor.

3.2.10   Splitting an order item to two items and transferring the holdings

When a library orders material from a supplier, it sometimes receives a few copies of another edition. In such cases, the order item must be split into two items and a part of holdings must be transferred to a record of another material (in the COBISS2 environment, holdings data is transferred to another bibliographic record). If you completed the delivery note and paid the invoice before that, the delivery note and invoice item is split as well in such a case.

The procedure is described in the *COBISS3/Holdings User Manual* (see chapter *10.1.1*).

3.2.11   Ordering multi-volume monographs

An order of a multi-volume monograph is created in the same way as with other order types. Under an order item, you have to select a *multi-volume monograph*.

For a multi-volume monograph, it is not recommended to enter the price under an order item. Allocation and release of financial means would not show the real situation. Only advance and invoice payments for individual volumes of multi-volume monographs can be monitored.

Note:

You cannot enter advance payment under multi-volume monographs.

Individual volumes of a multi-volume monograph cannot be cancelled. Order item cancellation refers to all the volumes of a multi-volume monograph, except the ones that you have already received.

Receipt and payment of each volume is performed in the same way as for regular monographs. In view of the receipt of individual volumes you can create several delivery notes and invoices for one order item.

Note:

Before completing a delivery note or a delivery note item for a multi-volume monograph, a COBISS.SI-ID must be defined for the material, whereby a link to a bibliographic record is established.

Claims for an undelivered or received volume are made in the same way as for a regular monograph.

After the last volume of a multi-volume monograph has been received, the receipt is closed under the order item. Order item can be re-opened, which makes it possible to receive further volumes.

Sometimes it becomes clear that a monograph is actually a multi-volume monograph only after the acquisition procedure has been concluded. In such cases it is possible to change the closed order item from a monograph to a multi-volume monograph.

Note:

Multi-volume monographs cannot be sent for exchange.

3.2.11.1   Closing the receipt of a multi-volume monograph

After all the volumes of a multi-volume monograph have been received, close the receipt under the order item.

Precondition   The type of material under the order item must be *multi-volume monograph.*

Procedure	1. In the **Order item** class, find and select the order item.
	2. Select the **Object / Close receipt of multi-volume monograph** method.

Status after closing the receipt of a multi-volume monograph

Order item

- *received*

Copy

- *received*

3.2.11.2 Changing the order item status

You can change the status of an order item of a multi-volume monograph from *received* back to *ordered*, whereby you make the receipt of individual items possible.

Precondition	The type of material must be *multi-volume monograph*. The order item status must be *received*.
Procedure	1. In the **Order item** class, find and select the order item.
	2. Select the **Object / Change status of the item for multi-volume monograph** method.

Status after changing an order item status

Order item

- *ordered*

Copy

- *in process*

3.2.11.3 Changing the type of material

Sometimes it becomes clear that a monograph is actually a multi-volume monograph only after the acquisition procedure has been concluded. In such cases it is possible to change the closed order item from a monograph to a multi-volume monograph. The order item status is then changed to *ordered*.

Precondition	The type of material must be *monograph*.
Procedure	1. In the **Order item** class, find and select the order item.
	2. Select the **Object / Change to multi-volume monograph** method.

The type of material is then changed from *monograph* to *multi-volume monograph*.

3.2.12   Ordering individual monographic series items

An order of a monographic series is created in the COBISS3/Serials module, whereas you order, receive and pay for individual items of monographic series in the COBISS3/Acquisitions module.

Ordering, receiving and paying procedures of monographic series items do not differ from acquisitions procedures of regular monographs.

When creating an order for an individual monographic series item, you must, under the order item, select a *monographic series item* as the type of material. Under the order item, using the **Monographic series order** button, define the link to a monographic series order. In this way, an overview of orders, receipts and payments of individual monographic series items, which are performed in the COBISS3/Acquisition module, is possible under an item for a monographic series order in the COBISS3/Serials module.

3.2.13   Order cancellation

You can prepare order cancellations either in the **Order** class or in the **Order item** class.

Order cancellation can be required due to:

- unexpected receipt of the material – exchange, gift or subsidy
- non-delivery although a claim has been sent to the supplier
- supplier's notification that the material is not available

Order cancellation can be performed for:

- the entire order
- all the copies of one item
- individual copies of one item

You can transfer an ordered item to either a prepared order or to a new order (re-routing an order). In such a case, for the order item, the order cancellation of all the copies ordered will be prepared.

Then submit the order cancellation. All the items newly cancelled from the same supplier will be placed on the order cancellation being prepared as long as this cancellation is not submitted.

In funds, specified under order items, the amount tied to orders decreases and the amount available increases; the changed amount is the amount of cancelled copies. If you cancel an order for which the advance payment was made, the advance payment will be added to the amount of existing overpayments by suppliers, that is apportioned by funds, specified under advance payment items.

When preparing an order cancellation, fields 996 belonging to the copies that have been cancelled will be deleted. If an order cancellation is revoked, fields

996 for copies for which the cancellation has been revoked will be created again.

3.2.13.1 Preparing an order cancellation

You can cancel an order that you have already submitted and sent to the supplier.

Precondition   You can cancel orders with the following status: *submitted.*

Procedure   1. In the **Order** class, find and select the order.

2. Select the **Object / Cancel order** method.

     The **Order cancellation** editor will open, where, for the selected supplier, all the items are listed that have been selected for cancellation before but the cancellation of which has not been submitted yet. Order items that you have just cancelled are in this list as well.

     The data on the supplier transferred from the order cannot be changed.

3. The sending method and language are transferred from the database of partners. You can change both values.

4. To enter an internal note, click the **Note** button.

     Enter and save the text in the window that will open.

5. To enter the note that should appear on the order cancellation, click the **Cancellation note** button.

     Enter and save the text in the window that will open.

6. Save the data.

A number, which cannot be changed, will be assigned to the order cancellation. Order cancellations are numbered automatically, in compliance with the setting of the counter for order cancellations (see chapter *11.3*).

In order items, the number of copies ordered is deleted and the number of copies cancelled is increased accordingly.

The relevant fields 996 of the copies for which you have prepared an order cancellation will be deleted.

Status after preparing an order cancellation

Order

- *cancelled*

Order item

- *cancelled*

Copy

- *cancelled*

Order cancellation

- *entered*

What to do next   Submit the order cancellation and send it to the supplier.

3.2.13.2 Preparing an order item cancellation

Under an order item, it is possible to cancel the order of all the copies or of some copies.

Precondition   The order item status must be *ordered.*

Procedure

1. In the **Order item** class, find and select the order item.

2. Select the **Object / Prepare item cancellation** method.

    The **List** window will open. The copies ordered are in the "Selected" list.

3. In the "Selected" list, mark the copy the order of which you do not want to cancel and move it to the "Unselected" list using the **Remove** button.

4. Click the **OK** button.

    The **Order cancellation** editor will open, where, for the selected supplier, all the items are listed that have been selected for cancellation before but the cancellation of which has not been submitted yet. Order items that you have just cancelled are in this list as well.

    The data on the supplier transferred from the order cannot be changed.

5. The sending method and language are transferred from the database of partners. You can change both values.

6. To enter an internal note, click the **Note** button.

    Enter the text into the text entry window and save it.

7. To enter a note that should appear on the cancellation, click the **Cancellation note** button.

    Enter the text into the text entry window and save it.

8. Save the data.

A number, which cannot be changed, will be assigned to the order cancellation. Order cancellations are numbered automatically, in compliance with the setting of the counter for order cancellations (see chapter *11.3*).

In the order item, the number of copies ordered is decreased by the number of copies cancelled.

Under "No. of copies cancelled", the total number of copies cancelled is given. The history of all cancellations can be found in the list of events.

The relevant fields 996 of the copies for which you have prepared an order cancellation will be deleted.

Status after preparing an order item cancellation	Order
	
	   • *partially cancelled*
	
	Order item
	
	   • *cancelled*: if you have cancelled the order of all the copies
	   • *ordered*: if you have cancelled the order of some copies
	
	Copy
	
	   • *cancelled*: if you have cancelled the order of the copy
	   • *ordered*: if you have not cancelled the order of the copy
	
	Order cancellation
	
	   • *entered*

Options	Under the order item that you have cancelled, you can enter the reason for cancellation, which will appear on the order cancellation. In the **Order item** editor click the **Cancellation note** button, then enter and save the text.
What to do next	Submit and send the order cancellation to the supplier.

3.2.13.3 Transferring an item to another order (re-routing an order)

The order item can be transferred to any other prepared order or to a new order, whereby the order cancellation of all the copies ordered under the item of the original order will be prepared.

Precondition	The order item status must be *ordered*.

Procedure	1. In the **Order** class, find and select the order.
	
	2. In the list of objects related to the order, select the item that you wish to transfer. You can select several objects simultaneously.
	
	3. Select the **Object / Add to order/Transfer to another order** method.
	
	   The **Search – Order** search window will open, where you can choose only from orders entered. If the supplier is specified for the item, the search is limited only to orders for the selected supplier. Search criteria can be changed.
	
	4. Find and select the order that you want to transfer the item to. If you want to transfer the item to a new order, close the search window by clicking the **Close** button.
	
	   The **Order cancellation** editor will open.
	
	5. Prepare the order cancellation, following the steps described in the procedures for preparing an order cancellation or an order item cancellation.
	
	   The item will then be transferred to the selected order, and the **Order** editor will open.

6. Continue with the procedure of preparing an order (see chapter *3.2.1*).

The relevant fields 996 of the copies for which you have prepared the order cancellation will be deleted.

Status after transferring an item to another order

Original order

- *partially cancelled*

Order item on the original order

- *cancelled*

Copy on the original order

- *cancelled*

New order

- *entered*

Order item on the new order

- *order prepared*

Copy on the new order

- *order prepared*

Order cancellation

- *entered*

What to do next   Submit and send the order cancellation to the supplier.

3.2.13.4 Transferring items to another cancellation

Items can be transferred from a prepared order cancellation to any other prepared order cancellation or to a new order cancellation.

Procedure

1. In the **Order cancellation** class, find and select the order cancellation.

2. Select the **Object / Move items** method.

    A window with a list of order cancellations prepared for the selected supplier will open.

    If no order cancellation has been prepared for the supplier, the window will not open; instead a new order cancellation will be prepared.

3. Select the order cancellation and click the **OK** button.

    A window with a list of items on the selected order cancellation will open.

4. Select the item(s) and click the **OK** button.

    The **Order cancellation** editor will open.

5. Prepare an order cancellation as described for the following procedures: preparing an order cancellation or preparing an order item cancellation.

Status after transferring items to another cancellation

Order cancellation

- *entered*

3.2.13.5 Revoking an order item cancellation

The order item cancellation can be revoked until the order cancellation is submitted and sent to the supplier.

Precondition

Order item status must be *cancelled* or *ordered*.

Procedure

1. In the **Order item** class, find and select the order item.

2. Select the **Object / Revoke item cancellation** method.

   The **List** window will open. Cancelled copies are in the "Selected" list.

3. In the "Selected" list, mark the copy for which you do not wish to revoke the order cancellation and transfer it to the "Unselected" list using the **Remove** button.

4. Click the **OK** button.

Fields 996 for copies for which the cancellation has been revoked will be created again.

Status after revoking an order item cancellation

Order

- *submitted*: if no order items have been cancelled
- *partially cancelled*: if several order items have been cancelled

Order item

- *ordered*

Copy

- *ordered*

3.2.13.6 Entering the data about sold out material

If you have received a notification from the supplier stating that the material is sold out, you can enter this data under the order item. Before doing that, you must cancel the order item.

Precondition

The order item status must be *cancelled* or *cancellation submitted*.

Procedure

1. In the **Order item** class, find and select the order item.

2. Select the **Object / Mark material as 'sold out'** method.

Status after recording sold out material

Order item

- *sold out*

3.2.13.7 Submitting and sending an order cancellation

Before submitting an order cancellation, you can edit it, e.g. you can enter the note that appears on the order cancellation or change the sending method.

When submitting an order cancellation, the current date becomes automatically recorded as the order cancellation submission date. Then, depending on the selected sending method, the order cancellation is either printed out or sent to the supplier by e-mail.

Precondition

The supplier and mailing address must be specified for the order cancellation, which must have items.

Procedure

1. In the **Order cancellation** class, find and select the order cancellation.

2. Select the **Object / Submit and send** method.

   The current date will be recorded within the data on the order cancellation, under "Submitted".

   The **Overview and sending of created report** window will open, from where you can send the order cancellation to predefined or changed destinations. In the *Basic Guidelines COBISS3 User Manual* you can find how to send a report (see chapter *4.5*).

Status after submitting and sending an order cancellation

Order

- *cancelled*: if you have cancelled the order as a whole
- *partially cancelled*: if you have cancelled some order items

Order item

- *cancellation submitted*: if you have cancelled all ordered copies
- *ordered*: if you have cancelled some ordered copies

Copy

- *cancelled*: if you have cancelled the order of the copy
- *ordered*: if you have not cancelled the order of the copy

Order cancellation

- *submitted*

Options

You can simultaneously submit all order cancellations prepared. Highlight the **Order cancellation** class and select the **Class / Submit and send** method.

3.2.14   Entering a supplier's notification

After you have sent an order to the supplier, the supplier can send you a notification about the order item status, e.g. your order has been recorded, the material is sold out, the material has not yet been published, etc. Find the order item and enter the notification received. On the basis of the notification, you can change the claim time limit before claiming undelivered material or you can cancel the order.

Procedure

1. In the **Order item** class, find and select the order item.

2. Select the **Object / Edit** method.

    The **Order item** editor will open.

3. To enter the notification, click the **Supplier's notification** button.

    Enter the text into the text entry window and save it.

4. Enter the date of the notification.

5. Save the data.