4.2   SENDING MATERIAL IN EXCHANGE

The procedure of acquiring the material, which you will send in exchange to another library, is described in the relevant chapters: Purchase of material, Receiving gifts, etc.

When entering the receipt of the material intended for exchange, specify *exchange* as the purpose of acquisition; you can define also the exchange partner. The procedure of defining the purpose of acquisition and the exchange partner is described in chapter *3.2.1.2.1*.

After closing the receipt, the exchange status under the item received is automatically set to *available for exchange*. The number of copies available for exchange is recorded automatically. You cannot close the receipt if the exchange partner selected is inactive or if the role of exchange partners has not been specified.

Before sending material in exchange, enter an exchange-based order for the material, received from the library that is your exchange partner in this transaction. The items, for which the exchange partner was defined already when acquiring the material, will be placed on the order. If you wish, you can extend the list of items.

After that prepare a shipment and a list that will accompany the shipment. Send material, prepared in this way, together with the list, to another library.

	Note:
⚠	*Data about sending material will not be added to the holdings data.*
	Multi-volume monographs cannot be sent for exchange.

Status after closing receipt of material if the exchange partner is not specified

Item received

- *available for exchange* (Status – Exchange)

"Available to define exchange partner" will get the value *Yes.*

Status after closing receipt of material if the exchange partner is specified

Item received

- *available for exchange (Exchange status)*

"Available to define exchange partner" will get the value *No.*

Exchange-based order received

- *entered*

Item for the received exchange-based order

- *entered*

Copy

- *order prepared (exchange)*

4.2.1   Entering an exchange-based order received

When entering an exchange-based order received, first enter general data about the order and then order items.

In the **Exchange-based order received** class, enter an order received.

Precondition

The details of the library that functions as your exchange partner in this case must be recorded in the database of partners. The role of *Exchange partner (ACQ, S)* must be marked.

Procedure

1. Highlight the **Exchange-based order received** class.

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

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

3. Find and select the exchange partner.

   The **Exchange-based order received** editor will open.

   The items for which the exchange partner was selected already when acquiring the material will be placed on the order.

4. Under "Reference document", enter the number of the order received.

5. Under "Reference document date", enter the date of the order received.

6. To enter an item of the order received, click the **New object** button.

   The **Search – Item received** search window will open.

7. Find and select the item received. You can search only through items with *exchange* as the purpose of acquisition and without selected exchange partner. You can select several items received.

   The item will be placed on the order received. Data on the material, price and the number of copies ordered will be specified automatically. The price can be changed. If the selected item received contains several available copies without a selected recipient, only the first available copy is added to the order.

8. Click the **Total amount** tab.

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

9. Save the data.

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

Status after having entered an exchange-based order received

Item received

- *available for exchange (Exchange status)*

Exchange-based order received

- *entered*

Item for the received exchange-based order

- *entered*

Copy

- *order prepared (exchange)*

What to do next   Close the exchange-based order.

Options   You can add an item received to the order received also by using the relevant method. Find and select the item received that is intended for exchange. Select the **Object / Add to the exchange-based order received** method.

4.2.2   Closing an exchange-based order received

After concluding the entry, close the exchange-based order received. The number of copies received under the item received will increase and the number of copies available will decrease.

Procedure

1. In the **Exchange-based order received** class, find and select the order.

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

Status after closing an exchange-based order received

Item received

- *ordered (Status – Exchange)*
- *available for exchange (Exchange status): if the number of copies available for exchange is bigger than zero*

Exchange-based order received

- *ordered*

Item for the received exchange-based order

- *ordered*

Copy

- *ordered (exchange)*

What to do next   Prepare a shipment of exchange material.

4.2.3   Cancelling an exchange-based order received

After having closed an exchange-based order received, you can change the order status from *ordered* back to *entered*. Under the item received, the number of copies ordered will decrease and the number of copies available will increase.

Procedure

1. In the **Exchange-based order received** class, find and select the order.

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

Status after cancelling an exchange-based order received

Item received

- *available for exchange (Exchange status)*

Exchange-based order received

- *entered*

Item for the received exchange-based order

- *entered*

Copy

- *order prepared (exchange)*

4.2.4   Deleting an exchange-based order received

You can delete an exchange-based order as long as you do not close it.

Precondition

You can delete only received orders with the status *entered*. Before deleting an order, you must delete all the order items.

Procedure

1. In the **Exchange-based order received** class, find and select the order.

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

   The **Exchange-based order received** editor will open.

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

   The item will be deleted from the order.

4. Repeat step 3 for all the order items.

5. Save the order, which contains no items.

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

4.2.5   Preparing a shipment of exchange material

After closing an exchange-based order received, prepare a shipment of material and a list that will accompany the shipment. Send the material together with the list to another library.

Procedure

1. Highlight the **Shipment of exchange material** class.

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

    The **Shipment of exchange material** editor will open.

3. Define the exchange partner.

    Click the **Exchange partner** button, which forms a link to the **Partner** class, where also partners in the role of exchange partners are listed. The **Search – Partner** editor will open. Find and select the exchange partner.

Tip:

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

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4. Sending method and language of the list are transferred from the database of partners. You can change both values.

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

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

6. To enter a note that should appear on the list, click the **Note on list** button.

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

7. To enter the items for the shipment of exchange material, click the **New object** button.

    All the items from closed exchange-based orders received for the selected exchange partner that have not been placed on any shipment of exchange material will be added to the list.

8. You can enter also a shipment item, for which you have not performed an acquisition procedure, to the shipment of exchange material (see chapter *4.2.5.1*).

9. Check and, where necessary, add data about the price under the shipment item (see chapter *4.2.5.2*).

10. Save the data.

A number, which cannot be changed, will be assigned to the shipment of exchange material. Shipments are numbered automatically, in compliance with the setting of the counter for shipments of exchange material (see chapter *11.3*).

Status after preparing a shipment of exchange material

Item received

- *ordered* (Status – Exchange)
- *available for exchange* (Status – Exchange): *if the number of copies available for exchange is bigger than zero*

Shipment of exchange material

- *entered*

Item for the shipment of exchange material

- *prepared for shipment*

Copy

- *prepared for shipment*

Exchange-based order received

- *prepared for shipment*

Item for the received exchange-based order

- *prepared for shipment*

Options   You can prepare a shipment of exchange material also in the following way: In the **Exchange-based order received** class, find and select an order received with the status *ordered*. Then select the **Object / Prepare shipment of exchange material** method. The exchange partner is already specified, the same applies for the sending method and language of the list. On the list are all the items of the selected order.

If a shipment of exchange material with the status *entered* already exists for the selected partner, the program will ask you whether you wish to add the order items to the existing shipment. If you click the **Yes** button, the **Shipment of exchange material** editor for the existing shipment will open. Items, added to the shipment earlier, and items of the selected order will be placed on the list of items.

If you click the **No** button, the **Shipment of exchange material** editor for a new shipment will open, with all the items of the selected order placed on the list of items.

Enter any changes if required and save the data.

What to do next   Submit the list of exchange material, which will accompany the shipment, and send it to the exchange partner.

4.2.5.1 Entering items to a shipment of exchange material without prior acquisition procedure

You can enter items without prior acquisition procedure to the shipment of exchange material in the **Shipment of exchange material** editor.

Procedure   1. Click the **Direct entry** button in the **Shipment of exchange material** editor.

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 *2.2.1*).

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

3. Click the **New object** button in the **Material** editor to enter an item.

   The **Item for the shipment of exchange material** editor will open.

   You can only view the bibliographic data; you cannot change it.

4. Enter the price, or transfer it (see chapter *4.2.5.2*).

5. Enter the copies data (see chapter *3.2.1.2.1*).

6. Save the data.

4.2.5.2   Transferring a price

See chapter 4.1.1.2.1.

4.2.6   Transferring items to another shipment of exchange material

You can transfer items from a shipment of exchange material prepared for a specified exchange partner to some other already prepared shipment or a new shipment.

Procedure

1. In the **Shipment of exchange material** class, find and select the shipment, from which you wish to transfer the items.

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

   A window with a list of shipments prepared for the specified partner will open. If no shipment is in the list, the window will not open; a new shipment will be prepared.

3. Select the shipment and click the **OK** button.

   A window with a list of items placed on the selected shipment will open.

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

   The **Shipment of exchange material** editor will open.

5. Prepare a shipment of exchange material.

What to do next   Submit the list of exchange material, which will accompany the shipment, and
                          send it to the exchange partner.

4.2.7   Deleting a shipment of exchange material

You can delete a shipment of exchange material as long as you do not submit
it.

Precondition   You can delete only shipments with the status *entered*. Before deleting a
                          shipment of exchange material, you must delete shipment items.

Procedure   1. In the **Shipment of exchange material** class, find and select the shipment.

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

                              The **Shipment of exchange material** editor will open.

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

                              The item will be deleted from the shipment.

                          4. Repeat step 3 for all the shipment items.

                          5. Save the shipment, which contains no items.

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

4.2.8   Submitting and sending a shipment of exchange material together with a list

When submitting a shipment of exchange material, the current date is recorded
as the submission date. After that the list is printed out and sent to the exchange
partner, together with the material.

Under the item received, the number of copies ordered will decrease and the
number of copies sent will increase.

Precondition   For the shipment, the exchange partner and the mailing address must be
                          specified and the items must be entered.

Procedure   1. In the **Shipment of exchange material** class, find and select the shipment.

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

                              The current date will be recorded in the data on the shipment, under
                              "Submitted".

                              The **Overview and sending of created report** window will open, from
                              where you can send the shipment 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 a shipment of exchange material with a list of material	Item received

Item received

- *sent* (Status – Exchange)
- *available for exchange* (Status – Exchange)*: if the number of copies available for exchange is bigger than zero*

Shipment of exchange material

- *submitted*

Item for the shipment of exchange material

- *shipment sent*

Copy

- *shipment sent*

Exchange-based order received

- *shipment sent*

Item for the received exchange-based order

- *shipment sent*

Options   You can submit all the shipments prepared at the same time. Highlight the **Shipment of exchange material** class and select the **Class / Submit and send** method. In the list, select the shipments that you wish to submit and send.