

8.1 ENTERING A LIST

Other types of acquisition include: old stock, own edition, subsidy, registration fee, membership, institutional deposit. When you receive material from the supplier, enter the list that usually accompanies the material. First enter general data about the list and then the data about each individual list item.

Enter also the number of damaged copies or possible discrepancies between the number of copies actually received and the number of copies on the list, or both. This represents the basis for preparing a claim for delivered material.

Enter the receipt of material in the **List of other receipts** class.

Precondition

Supplier details must be in the database of partners. The role of *Supplier (ACQ)* must be marked.

Procedure

1. Highlight the **List of other receipts** class.
2. Select the **Class / New object** method.
The **List of other receipts** editor will open.
3. Enter general data about the list of other receipts (see chapter 8.1.1).
4. Enter list item(s) (see chapter 8.1.2).
5. Save the data.

A number, which cannot be changed, will be assigned to the list of other receipts. Lists are numbered automatically, in compliance with the setting of the counter for lists of other receipts (see chapter 11.3).

Status after entering a list

List

- *entered*

List item

- *entered*

Copy

- *in process*

What to do next

Close the list of other receipts.

8.1.1 Entering general data

You can enter general data about the list of other receipts in the **List of other receipts** editor.

Procedure

1. Under "Acquisition type", select the appropriate value.

You can choose from: *old stock, own edition, registration fee, subsidy, membership, institutional deposit.*


2. Specify the supplier.

Click the **Supplier** button, which forms a link to the **Partner** class, where also partners with the role of suppliers of monographs are listed. The **Search – Partner** search window will open. Find and select the supplier.

If a department or contact person is specified for the supplier, the link to the department or contact person will appear in relation to the list.



Tip:

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

3. Under "Reference document", enter the number of the list of other receipts.
4. Under "Reference document date", enter the date of the list of other receipts.
5. Under "Date of receipt", the current date will be automatically offered, which you can change.
6. The list total in domestic currency is calculated automatically, at the same time as you enter prices for list items.
7. To enter an internal note, click the **Note** button.
Enter the text into the text entry window and save it.

8.1.2 Entering an item

You can enter an item for the list of other receipts in the **Item for the list of other receipts** editor.

Procedure

1. In the **List of other receipts** 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 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 item, click the **New object** button in the **Material** editor.
The **Item for the list of other receipts** editor will open.

Bibliographic data can only be viewed. You cannot change it.

4. Under "No. of copies on list", enter the number that is specified on the list received.
5. Enter the price of the copy, or you can transfer it (see chapter 8.1.2.1). You can enter the price also in foreign currency. Under the price in foreign currency, select a suitable value from the list of currencies.
6. If you receive damaged copies, enter the number of damaged copies. This represents the basis for preparing a claim.



Note:

Before entering the number of damaged copies, reduce the number of copies in the copies table accordingly.

7. You can enter the reason for claim, which will appear on the claim. To do that, click the **Claim note** button.

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

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

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

9. Enter the data about the copies received (see chapter 3.2.1.2.1).

In the copies table you can distribute only undamaged copies. The total number of copies can be found under "No. of undamag. copies received". You cannot change the number.

If the number under "No. of undamag. copies received" and the number under "No. of copies on list" differ, the difference represents the basis for preparing a claim.

10. You can immediately accession the copies received (see chapter 8.1.2.1).
11. Save the data.

Options

The apportionment of copies among departments for a list item can be printed out. Under the item, select first the **Object / Print** method, and then *Apportionment among departments – other receipts.*

8.1.2.1 Transferring a price

See chapter 4.1.1.2.1.

8.1.2.2 Accessioning copies and closing a list item

See chapter 4.1.1.2.2.