# Standing Orders in Alma

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The bridge to knowledge

# Agenda

**1** **Background**

**2** **The Standing Order**

**3** **The Ten Steps of a Standing Order**

**4** **The Standing Order – Demo**

**5** **The Standing Order for Electronic Resources**

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- There are three types POL (Purchase Order Line) continuity types:
  1. One-time
  2. Continuous
  3. Standing order

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- This presentation will focus specifically on continuity type "Standing order"
- In order to understand the context of the standing order within the "larger picture" we will first very briefly discuss the "One Time" and "Continuous" continuity types.

# One-time continuity type

- Used for one-time or infrequent orders
- Examples:
  1. Printed book
  2. E-book
  3. Musical scores (not published in a continuous manner)

# One-time continuity type – physical inventory

- When the order is continuity type "One-time" and the inventory is **physical** the material is received via the **One Time** tab on the Receive New Material page.
- Holdings and items are created automatically, with one holdings being created for each unique location, and one item for each copy.
- Once the PO line is invoiced and received it is closed.

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# One-time continuity type – electronic inventory

- When the order is continuity type "One-time" and the inventory is **electronic** the material goes through the standard activation process
- Once the PO line is invoiced and activated it is closed.

# Continuous continuity type

- Used for orders for which publication is repeated on a regular basis
- Examples:
    1. Monthly physical journals
    2. Quarterly electronic journals

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# Continuous continuity type – Physical inventory

- When the order is continuity type "Continuous" and the inventory is **physical** the material is received via the **Continuous** tab on the Receive New Material page.
- Holdings are created upon PO line creation (for each run of the series in a location) and items are created either
  - If a prediction pattern is used: When doing "Open predicted items"
  - If a prediction pattern is not used: Upon receipt of the issue or bound volume
- The PO line remains open once it is invoiced and received.  It can be closed manually.

# Continuous continuity type – Electronic inventory

- When the order is continuity type "Continuous" and the inventory is **electronic** the material goes through the standard activation process and may be deactivated during the evaluation process.
- The PO line remains open once it is invoiced and received/activated.  It can be closed manually).

# Background "Summary of One Time and Continuous"

| POL Type | Inventory Receipt / Activation | Holdings and Items Creation | POL closure |
|---|---|---|---|
| One Time - Physical | Received via the **One Time** tab on the Receive New Material page. | Holdings and items are created automatically | Once the PO line is invoiced and **received** it is closed |
| One Time - Electronic | Goes through the standard activation process. | | Once the PO line is invoiced and **activated** it is closed. |
| Continuous - Physical | Received via the **Continuous** tab on the Receive New Material page. | Holdings created upon PO line creation. Items created via prediction pattern or receipt of the issue. | The PO line remains open once it is invoiced and **received**. It can be closed manually. |
| Continuous - Electronic | Goes through the standard activation process and may be deactivated during the evaluation process. | | The PO line remains open once it is invoiced and **activated**. It can be closed manually. |

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# The Standing Order – an introduction

- A standing order is used for ordering material which is published from the same vendor in an irregular and unpredictable frequency.
- In most cases the standing order is an "open order" for all titles that fit a particular category or subject.
- The standing orders are placed for selected material for which it is important to ensure uninterrupted receipt of new editions or parts.

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# The Standing Order – an introduction

- The standing order is useful because library staff members do not have to check continuously to see if new editions or parts have been published.
- The vendor receives the standing order and knows that anything which meets the criteria of the order should be sent to the library.
- Examples:
  - Purchasing all the printed books by a particular author when they are published.
  - A series of books which are not published on a regular basis.
  - All pamphlets which a certain organization publishes

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# The Standing Order – an introduction

- With a standing order the physical material is not received on the Receive New Material page.
- Physical monograph material is created manually by
  - Creating or choosing a bibliographic record
  - Creating a holdings record (if not already existing)
  - Creating an item record
  - Associating the item with the standing order POL.
  - Setting the receipt date for the item in the Physical Item Editor.
  - Paying for the item via the invoice line

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# Background "Summary of One Time and Continuous"

| POL Type | Inventory Receipt / Activation | Holdings and Items Creation | POL closure |
|---|---|---|---|
| Standing Order - Physical | Not "received". Created and linked to POL in the item. | Holdings and items are created manually. | The PO line is manually closed |
| Standing Order - Electronic | Goes through the standard activation process. | | The PO line is manually closed |

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## The Ten Steps of a Standing Order

- These are the ten steps involved in creating and processing a standing order
- Note that this is a recommended workflow but it is possible to deviate from these steps based on local "customs" and needs.

# The Ten Steps of a Standing Order

1. Create a bibliographic record which will be used to create the order.
2. Suppress the bibliographic record because it is not a real record, but rather a description of the standing order.
3. Create an order for the record and choose purchase type 'Physical – Standing Order …'
4. In the order price enter the amount which you want to be encumbered on the budget(s) used for this order.
5. Send the order

6. Whenever an item arrives for the standing order catalog it as a separate bibliographic record and add holding record and item.
   This can be done in one of two ways:
   via the metadata editor or via menu 'Resource management > Create Inventory > Add Physical Item'

7. In the item record enter the receiving date and link it to the POL

# The Ten Steps of a Standing Order

8.  When invoice arrives pay for each item which arrived as part of the standing order using a separate invoice line for each item.

9.  Pay the invoice as you would pay any invoice

10. When the vendor will no longer be sending items for the standing order it should be manually closed.

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# The Standing Order - A Live Demo

- In this example we will make a standing order for "All catalogs published by the archaeological institute". These are catalogs which are printed on an irregular random basis.
- The vendor receives the order and knows that any time another catalog is published it should be sent to the library
- The example used here can be used for any type of physical material which is supplied form the same vendor in an irregular and unpredictable frequency

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# The Standing Order - A Live Demo

- Create order for the suppressed record with title "All catalogs published by the archaeological institute"



Suppressed

Create order

# The Standing Order - A Live Demo

- Here we create the order (POL-44218)

- In the order price enter the amount which you want to be encumbered on the budget(s) used for this order. This will likely be the amount which you think the series of items will eventually cost.

**Pricing**

List Price * 1000.00 USD ▼

Quantity for pricing * 1

## The Standing Order - A Live Demo

- The first pamphlet arrives for the standing order.
- It is "A report on the archeological findings at Fort Humboldt state monument, California".
- The bibliographic record, holding record and item are added.
- In the item record enter the receiving date and link it to the POL

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# The Standing Order - A Live Demo

- Here we add the PO Line and the Receiving Date to the first item received for the standing order



POL of the standing order

- At some later point another record arrives for the standard order.  As was done for the first order we catalog it, add a holding record and an item.  We link the item to the same standing order POL.
- The pamphlet that arrives now is "Assessment of gravel operation damage to prehistoric sites and recording the Santa Fe Trail"

# The Standing Order - A Live Demo

- As with the previous item which already arrived for the standing order, we link this item to the standing order and add the receiving date

| Resource description | Assessment of gravel operation damage to prehistoric Bent County, Colorado / Lintz, Christopher R. the archae |
|---|---|
| Holding | Main Library: General; F786 .L56 1987 |
| Barcode | AU39421 |
| Process type | - |

| Summary | General Information | ENUM/C | N |
|---|---|---|---|

| Barcode | AU39421 |
|---|---|
| Material type | Book |
| Provenance | |
| PO line | POL-44218 |
| Receiving date | 10/29/2015 |

POL of the standing order

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- When invoice arrives pay for each item which arrived as part of the standing order using a separate invoice line for each item

# The Standing Order - A Live Demo

- This is the **first** item of the standing order in the first invoice line

POL of the standing order

**Add Invoice Line**

| | | | |
|---|---|---|---|
| Type | Regular | Line Number | 1 |
| PO line | POL-44218 | | More Information |
| Title | All catalogs published by the archaeological institute | | |
| PO line price | 1,000.00 USD | | |
| Check subscription date overlap | ☐ | | |

Uncheck "Check subscription date overlap

| | | | |
|---|---|---|---|
| PO Line Subscription from date | - | PO Line Subscription to date | - |
| Subscription from date | | Subscription to date | |

Title and price of first item

| | | | |
|---|---|---|---|
| Additional Information | A report on the archeological findings at Fort Hur | | |
| Price | 400.00 USD | Release remaining encumbrance | ☐ |
| Total Price | 400.00 USD | | |
| Quantity | 1 | VAT Note | - |
| Reporting Code | Library and Information Science | | |

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- This is the **second** item of the standing order in the first invoice line

POL of the standing order

**Add Invoice Line**

Type | Regular

Line Number 2

PO line | POL-44218

More Information

Title All catalogs published by the archaeological institute

PO line price 1,000.00 USD

Check subscription date overlap ☐

Uncheck "Check subscription date overlap

PO Line Subscription from date -

PO Line Subscription to date

Subscription from date

Subscription to date

Title and price of second item

Additional Information Assessment of gravel operation damage to preh

Price 600.00 USD

Release remaining encumbrance ☐

Total Price 600.00 USD

Quantity 1

VAT Note -

Reporting Code Library and Information Science

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## The Standing Order - A Live Demo

- Pay the invoice in whatever manner you would normally pay an invoice

| Payment | | | | |
|---|---|---|---|---|
| Prepaid | ☑ | | | |
| Internal Copy | ☐ | | | |
| Payment status | Paid | | Voucher number | 613 |
| Voucher date | 10/29/2015 | | Voucher Amount * | 1000  USD |

| | ◆ Invoice # | ❗ | Status | ◆ Vendor | Owner |
|---|---|---|---|---|---|
| 1 | PO-55513 | 3 | Closed | J & S Ltd. (Formerl… | Main Library |

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# The Standing Order - A Live Demo

- In the fund transactions you can see each separate expenditure for each separate item of the same standing order

| Type | Related record | Amount |
|------|----------------|-------:|
| Expenditure | PO Line:POL-44218<br>Invoice Line: PO-55513:(1) | 400.00 USD |
| Expenditure | PO Line:POL-44218<br>Invoice Line: PO-55513:(2) | 600.00 USD |

POL of the standing order

First item and second item

# The Standing Order - A Live Demo

- For example this is the invoice line of the first item

**Invoice Line Details**

| | |
|---|---|
| Type | Regular |
| PO line | POL-44218 |
| Title | All catalogs published by the archaeological institute |
| PO line price | 1,000.00 USD |
| Check subscription date overlap | No |
| PO Line Subscription from date | - |
| Subscription from date | - |
| Additional Information | A report on the archeological findings at Fort Humboldt state monument, California |
| Price | 400.00 USD |
| Total Price | 400.00 USD |
| Quantity | 1 |
| Reporting Code | Library and Information Science |

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# The Standing Order - A Live Demo

- When the vendor will no longer be sending items for the standing order it should be manually closed.



All catalogs published by the archaeological institute,
Order/ Line status: Sent  /  Waiting for Renewal
MMS ID: 9980711300121
Assigned to: -
Type: Physical - Standing Order Monograph    Standard number: -    Order/Line: PO-55513    /    POL-44218
Copies: -    Total price: 1000.00 USD    Funds: Library and Information Science (100.0%) (01/01/2015 - 12/31/2015)
Vendor/Account: J & S Ltd. (Formerly "Johnson and Smith Ltd.") / J & S Ltd. Main Account JS_MAIN    Vendor referen
Renewal date: 12/31/2099    Receiving note: -    Sent Date: 10/28/2015
Price limit reached
Edit  |  Change Bib Reference  |  Close  |  Cancel

All catalogs published by the archaeological institute,
Order/ Line status: Sent    /  Closed
MMS ID: 9980711300121

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# The Standing Order for Electronic resources

- If the standing order had been for electronic resources then it would behave like the example done here for physical resources, except for two changes:
1. The purchase type would be "Electronic title – Standing Order" instead of "Physical – Standing Order"
2. Instead of creating an **item** and linking the item to the standing order POL an **electronic portfolio** would be created and linked to the POL

- The rest of the workflow would be identical.
- It may be advisable depending on the specific case to make one electronic collection for the standing order and make each portfolio part of that electronic collection.
- In this case a non-suppressed bibliographic record connected to the electronic collection might be used.

# The Standing Order for Electronic resources

- The purchase type would be "Electronic title – Standing Order" instead of "Physical – Standing Order"



1 **A Concise Companion to Feminist Theory [electronic resource].**
**Book {Book - Electronic}** By Eagleton, Mary. (Hoboken : Wiley 2008.)
ISBN: 0-631-22403-3 and others
Series: Blackwell concise companions to literature and culture
Subject: Feminist theory. -- Electronic books.

| | |
|---|---|
| Description * | A Concise Companion to Feminist Theory [electronic resource]. |
| Purchase Type * | Electronic Title - Standing Order |
| PO Line Owner * | Main Library |
| Load from Template | |

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- Instead of creating an **item** and linking the item to the standing order POL an **electronic portfolio** would be created and linked to the POL

**THANK YOU**
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