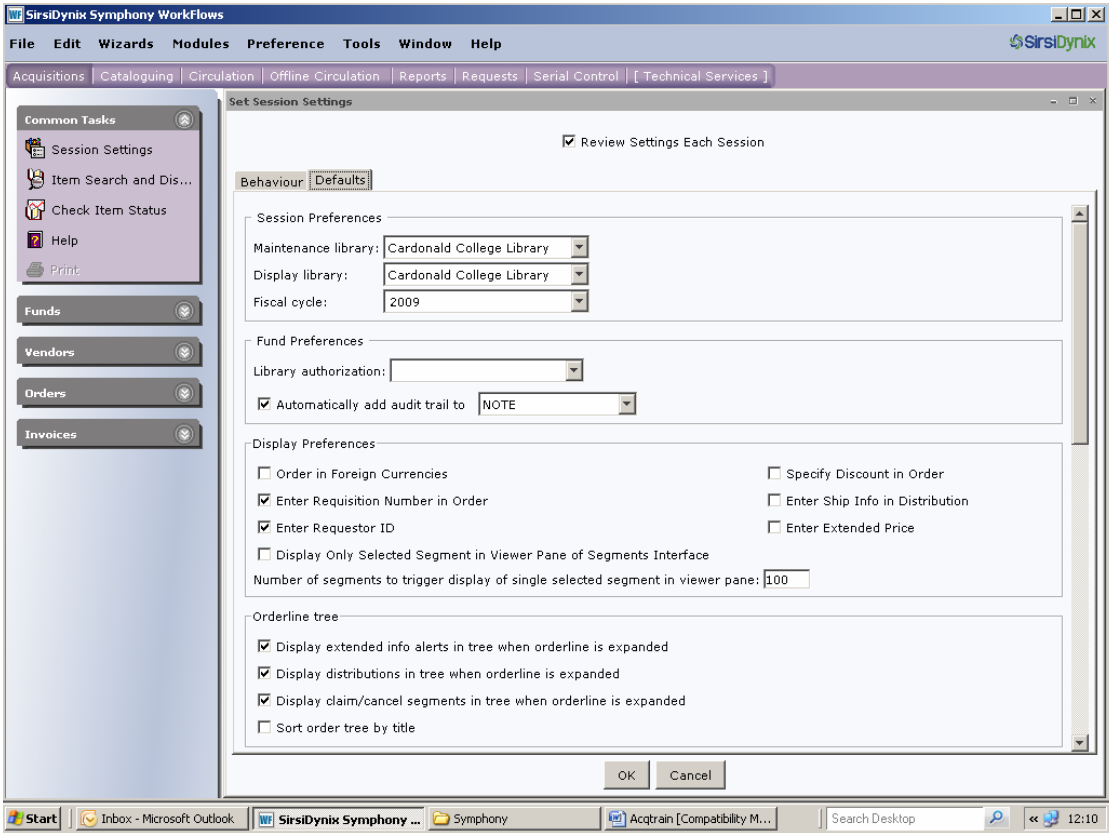
SYMPHONY ACQUISITIONS

ACQUISITIONS SESSIONS SETTINGS

On the **Common Tasks** toolbar, click the **Session Settings** wizard.

By default **Review Settings Each Session** is selected. This means that the session settings are displayed for review when you select an Acquisitions wizard.

Behaviour tab
By default **Enter Date Ready** is selected. This means that the Date Ready field will be available for editing in the purchase order.



Defaults tab

1. In the **Maintenance Library** box, select your library.
2. In the **Display Library** box, select your library.
3. In the **Fiscal Cycle** box, select this fiscal year.
4. When the **Library Authorization** field is empty, library authorisation has no effect on orders.
5. If you select **Automatic Add Audit Trail To,** then choose whether audit trail information is stored in the **Note** or **Comment** field. Selecting this feature will ensure that any modifications to budget amounts are recorded.
6. In the **Display Preferences** area, you can select any additional fields you may wish to use – ordering in foreign currencies, specifying discount, entering an order no, shipping info, requesters details.

7. In the **Orderline Tree** area, select or clear the check boxes for orderline display options.
8. In the **Invoice Behaviour Preferences** area, choose whether to automatically number invoice lines, or have warnings about increased prices or incorrect invoicing.
9. In the **Create Lines for Order Defaults** area, set default values for use with the Create Lines for Order helper.
10. In the **New Segments Defaults** area, select your library and **single funding**. Multiple funding is used where the cost of a single item is split between budgets.
11. In the **Claim and Cancellation Defaults area,** select default Cancel and Claim Reasons and Claim date.
12. Click **OK** when finished.

SYMPHONY ACQUISITIONS

ADD VENDOR

You will need to add a record for each supplier you will use with the Acquisitions module.

On the **Vendors** toolbar, click the **Add Vendor** wizard.

1. The **Vendor Information** tab, contains basic information fields, which apply to all fiscal cycles.
2. You will probably want to fill in an **ID** for the vendor, **Name**, possibly **Customer no**, **Currency** will usually be UK Sterling, and you will want to select, **Ordering allowed** and **Paying allowed**.

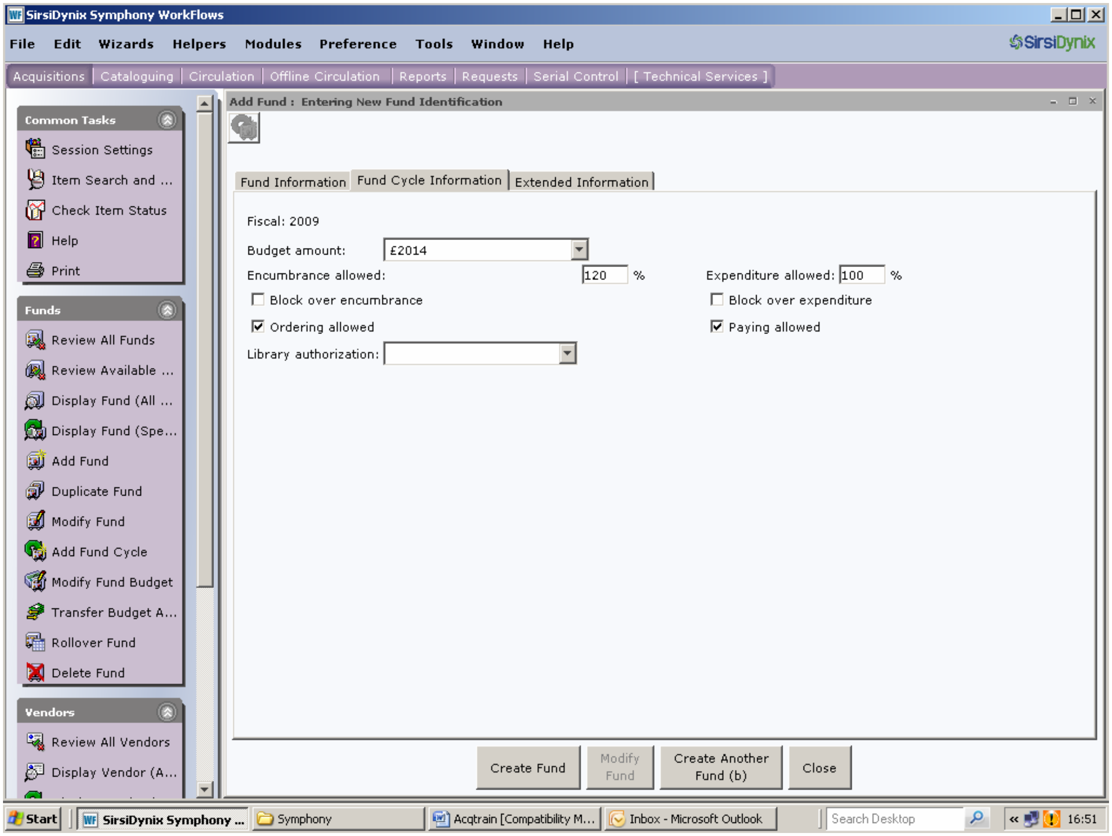
3. The **Vendor Cycle Information** tab, allows you to select the number of days from the date mailed to when a claim is made, or when an order is cancelled, for this vendor.

4. The **Addresses** tab allows you to enter different addresses for vendor accounting, ordering and service.

ADD FUND

You will need to add a record for each discrete budget heading you will use with the Acquisitions module

1. In the **Fund Information** tab, you can enter a unique fund **ID**, the fund **Name** and an **Account number**.



2. In the **Fund Cycle Information** tab, **Budget Amount** box, you can enter the financial budget for this fund.
3. In the **Encumbrance Allowed** box you can enter a figure of 100% or a lower or higher figure. Symphony will alert you when the committed funds reach this level.
4. In the **Expenditure Allowed** box you enter the percentage of funds you can spend before Symphony alerts you at the invoicing stage.

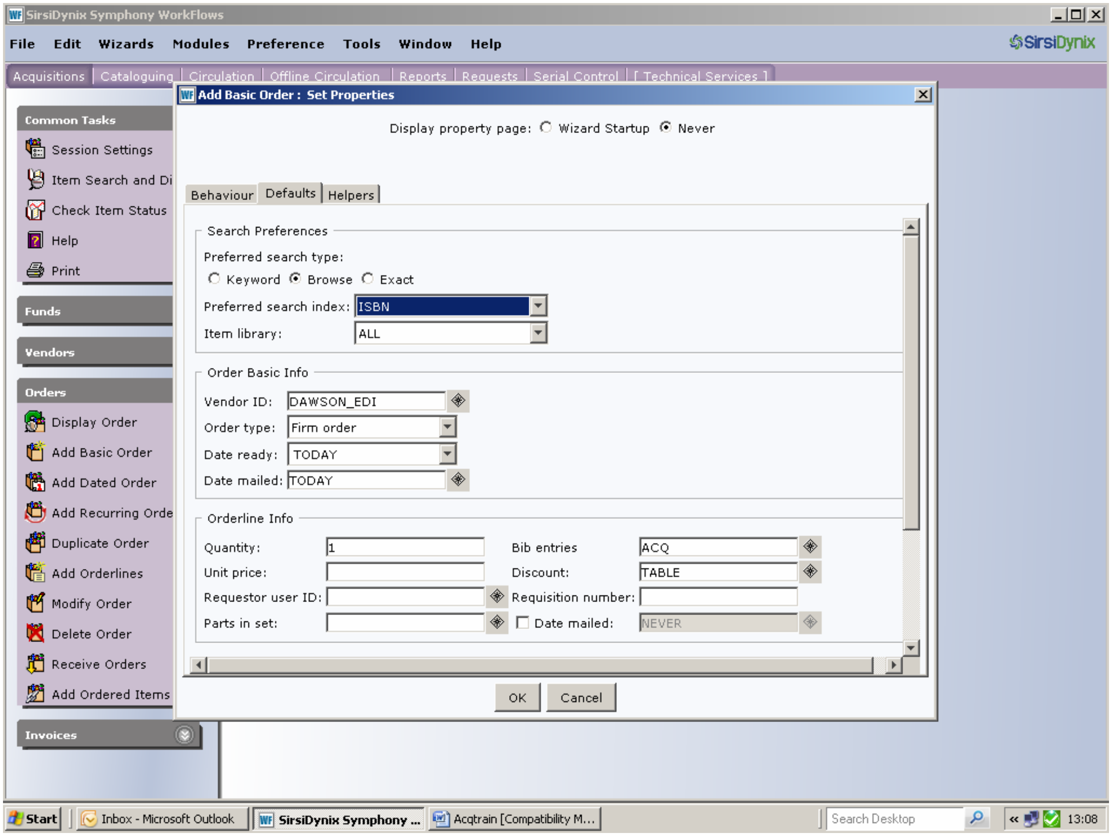
5. You can choose to **Block Over Encumbrance** or **Block Over Expenditure** by checking on the boxes on this tab.

6. You will need to check the **Ordering Allowed** and **Paying Allowed** boxes to use this fund.

7. Click on Create Fund

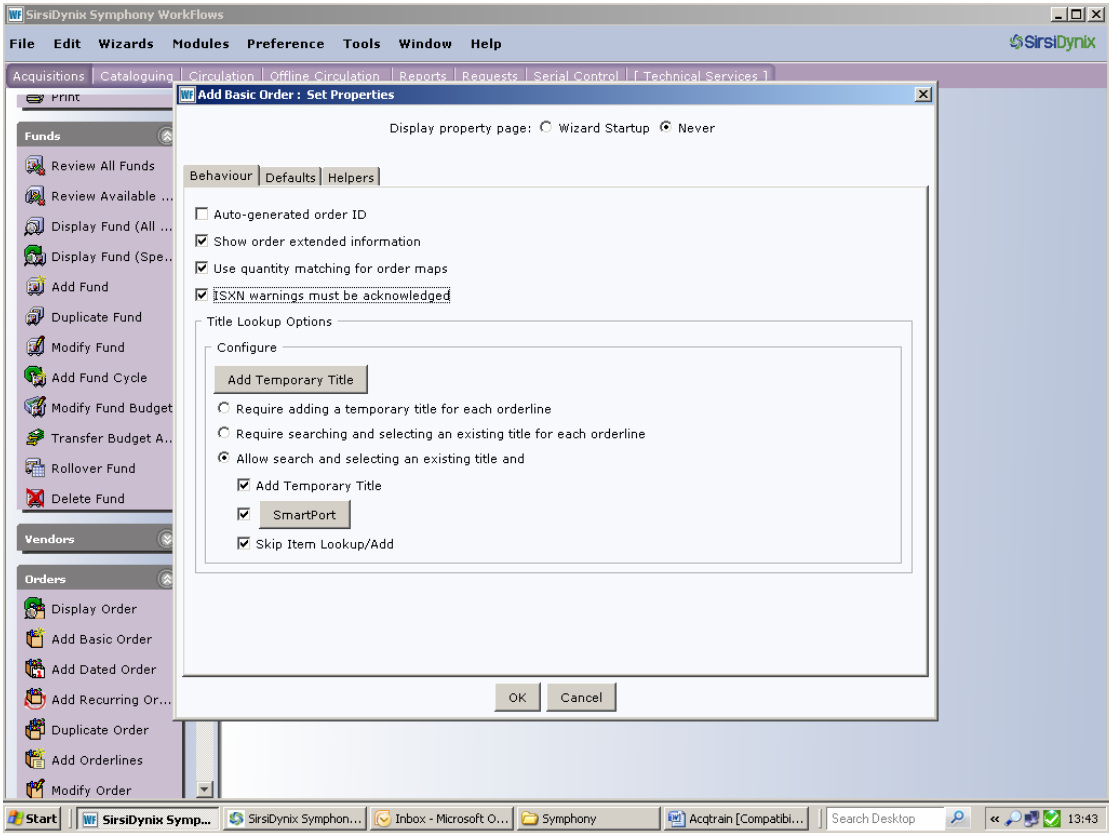
Add Basic Order

Right click to access the **Add Basic Order Properties** window. By setting defaults in this window you can minimise the number of steps to complete an order.



1. In the **Defaults** tab, you can set a default search method for order creation.
2. Normally you would set the **Item Library** to All, as you are searching all of the college libraries to see if the item exists already.
3. You may want to set a **Vendor ID** if most of your orders are from a particular supplier. You can still select alternative vendors during order creation.
4. In the **Order Type** box you have a choice of Approval, Firm or Gift.
5. The **Date Ready** box is used to control the Print Ready Purchase Orders report. Select Today if you will be printing the order.
6. The **Date Mailed** field contains the date the order was sent to the vendor. You can set to a specific date, today or never. Typically you will use the date that a purchase order notice will be generated.
7. In the **Orderline Info** box, you can select defaults for orderline information, but can you change this from the default within the order. The default **Quantity** is set at 1, and the **Bib Entries** default display template is ACQ.
8. In the **Segment Information** box, you can select default values for the order. If all lines in an order will be against the same **Fund** or have the same **Holding code** you may want to fill these in.

9. Check the **Automatically Display Payment Fields…** box to allow orders to be paid.
10. Check the **Automatically Display Receiving Fields…** box to allow orders to be received.
11. Check the **Automatically Display Loading Field…** to allow orders to be loaded into the catalogue.



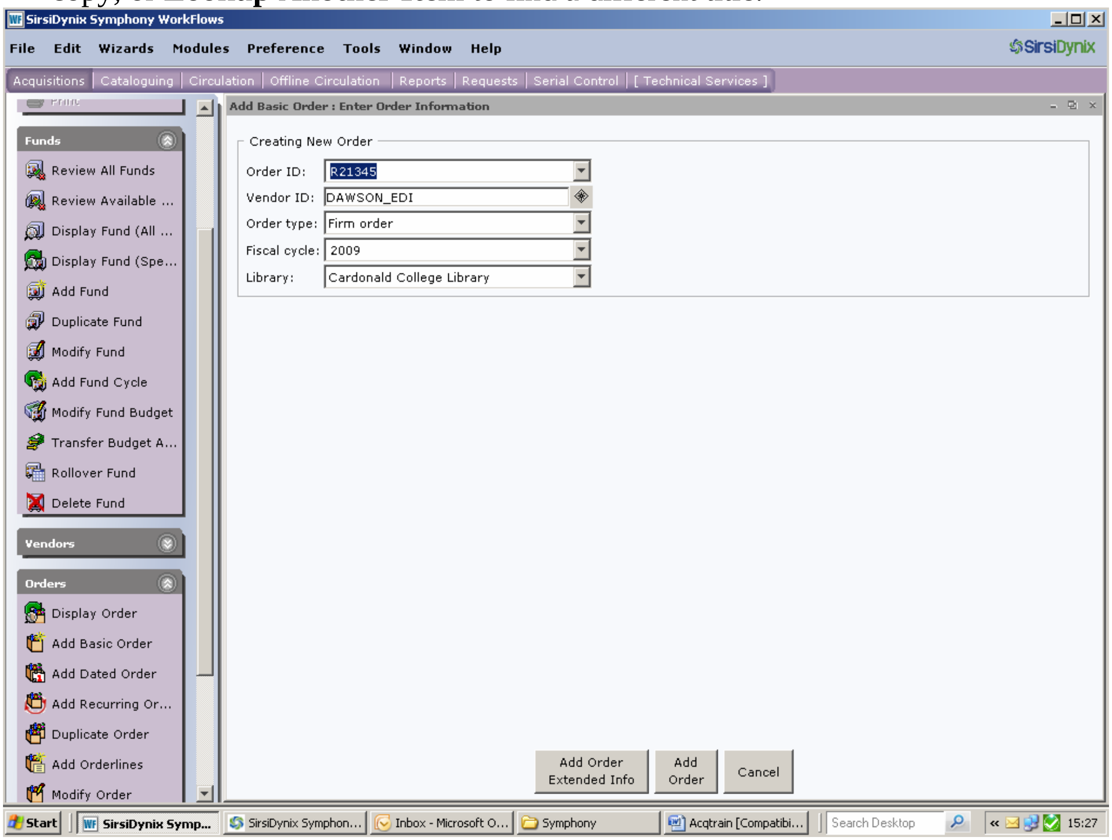
1. In the **Behaviour** tab, do not check the **Auto-generated order ID** box, if you wish to enter your own order number.
2. **Show order extended information** enables display of order level extended information whilst creating an order.
3. **Use quantity matching for order maps**, determines if order map values are included as part of the work flow. This box is selected by default.
4. If **Check ISXN warnings** is checked you will have to correct any invalid ISBNs before saving is allowed.
5. In **Title Lookup Options** you should check **Allow search and selecting an existing title** to search the catalogue first to check if a bibliographic records already exists.
6. You should check **and Add Temporary Title** if you may want to create a basic record during the ordering process.
7. You should check **and Smartport** if you may want to use outside catalogues to obtain a bibliographic record.

In the **Helpers** tab you can select which Helpers you want to display whilst adding a basic order.

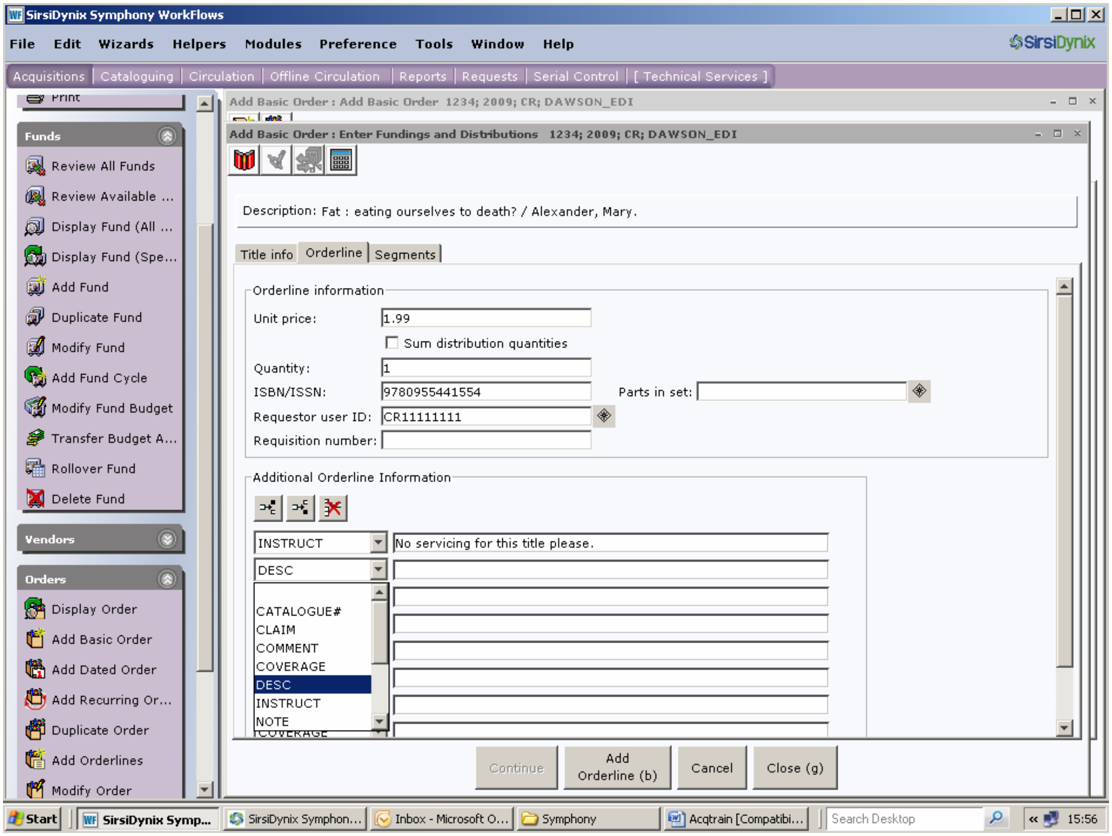
ADD BASIC ORDER WIZARD

To add a basic firm order

1. Click the **Add Basic Order Wizard**
2. In **Item Search** find an existing title and click **Order This Title**
3. Or if the title is not already in the catalogue, click the **Smartport helper**, search for the title and click capture for ordering.
4. Or if the title is still not found click the **Add Temporary Title helper** and create a title and call number for ordering.
5. If the title is already on order, you will be shown a list of orders with which the title is already linked. You can either **Continue Order** to order another copy, or **Lookup Another Item** to find a different title.



6. In the **Enter Order Information** window, you can enter an **Order ID** (which can be changed to an official order number later if required.), a **Vendor ID**, an **Order Type**, a **Fiscal Cycle** and your **Library**. You may have already set defaults for all or some of these fields.
7. You may **Add Order Extended Info** for the whole order by clicking on the button at the bottom of the screen. The Instruct and Note fields print on the order for the vendor.
8. Click **Add Order**



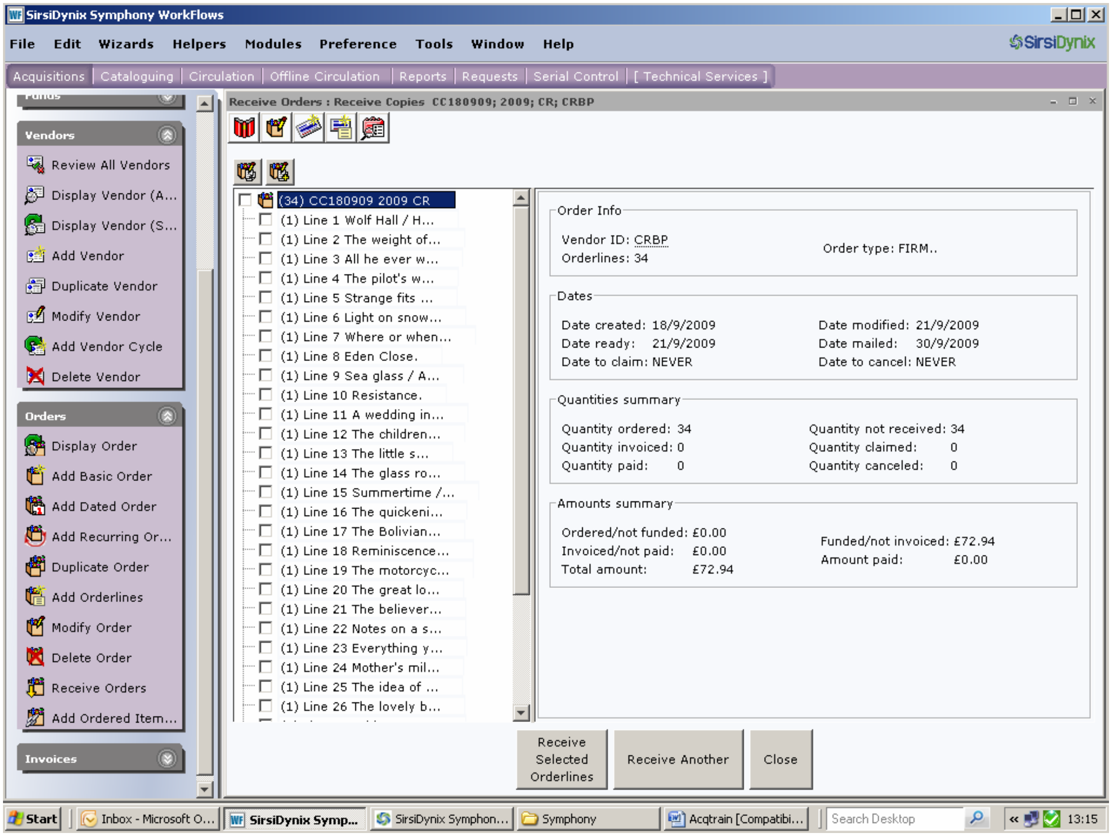
9. In the **Orderline** tab, fill in or change the fields for **Unit Price, Quantity, ISBN, Requisition Number**. Use the gadget if you wish to select a **Requester** from your complete list of Users.
10. You can add further information or instructions specific to this orderline in **Add Orderline Information** section.
11. Click **Continue** at the bottom of the screen.
12. In **the Segments tab**, select the **Fund ID** that you wish to use to pay for this item. The **Holding Code** value will be based on the wizard properties. Typically one funding and one distribution segment will display for all the copies of the same title.
13. Click **Add Orderline** to save changes and return to the Orderlines tab.
14. Click the **Add New Orderline** helper to add more titles.
15. Or click **Save Your Changes** to save this order
16. Or click **Finish** to mark the order as finished and set the Date Mailed.

PRINT PURCHASE ORDER

1. In the **Modify Orders** wizard, search for your order by Order ID.
2. Click on the centre helper at the top of the screen- **Produce Order Report**
3. You can select if you want your **Library address** to print on the notice, the **Notice Text** that will appear at the top of the order, **Count as Notice Mailed** to mark the order as mailed today.
4. Click **okay** to produce the order, and **okay** to confirm the order number.
5. Select the **Reports module**.
6. Select the **Finished Reports** wizard.
7. Select your order from the list of finished reports.
8. Click **View**, and deselect **View Log**.
9. Click on the **Print** icon

RECEIVE ORDERS

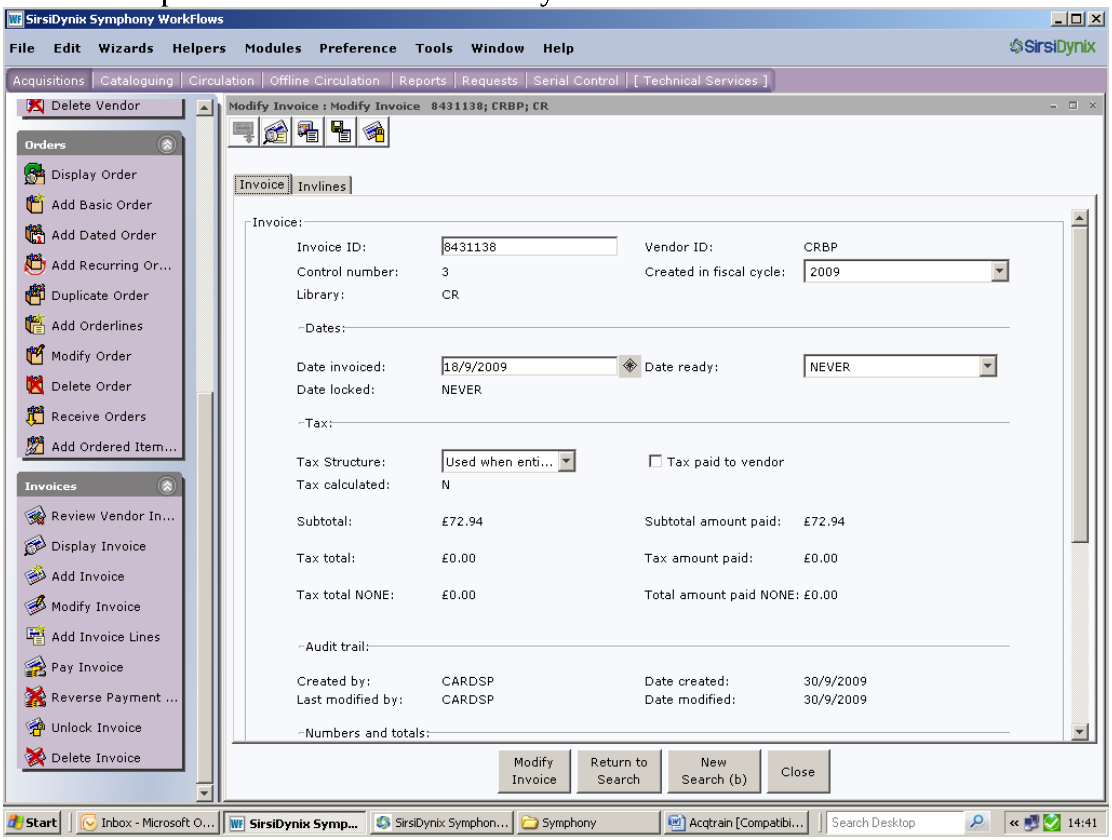
1. Click on the **Receive Orders** wizard.
2. Search for the order that you wish to receive, by order or catalogue information.
3. If more than one order displays, select the one you want and click **Receive Orders.**



4. On the tree select either the specific lines to receive or the entire order.
5. Click **Receive Selected Orderlines**
6. Click **Close** to exit or **Receive Another**

ADD INVOICE

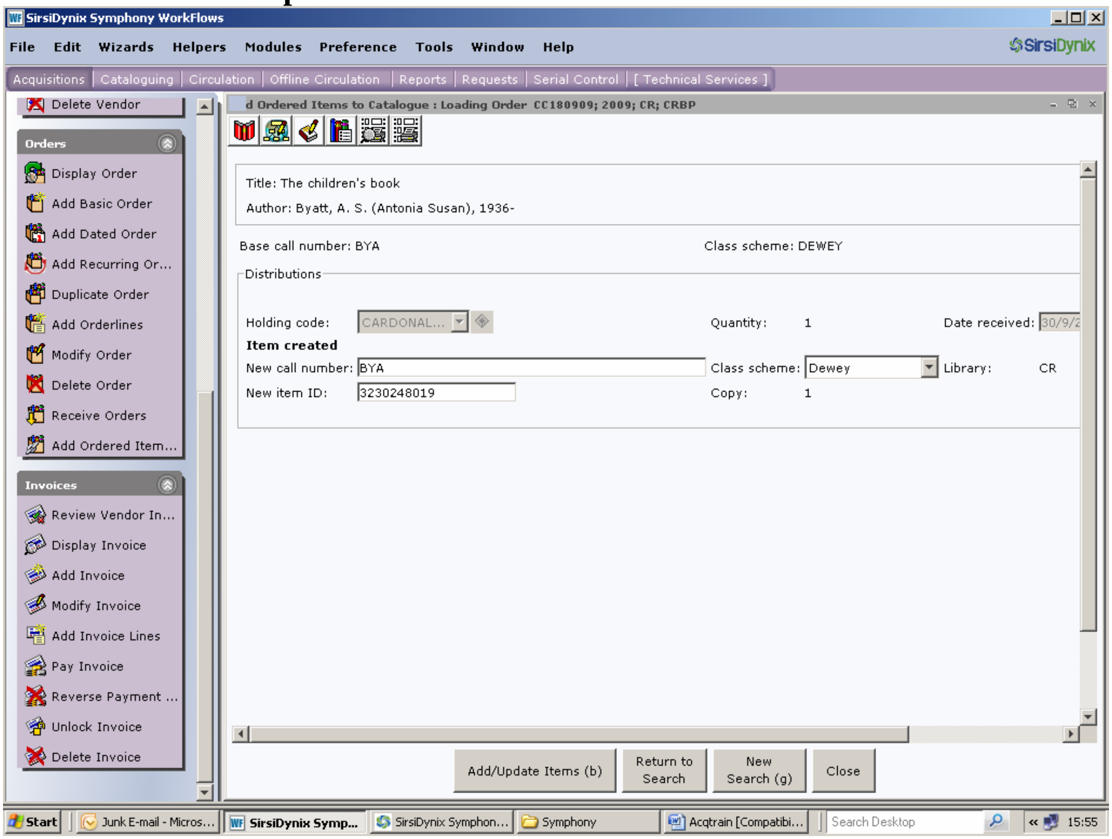
1. Click on the **Add Invoice** helper- the centre icon at the top of the **Receive Orders** screen.
2. Complete the **Invoice ID, Library, Date Invoiced** and **Fiscal** information fields.
3. In the **Tax Structure** field, select if the invoice is Exempt from Tax or if VAT is to be added. Click **Add Invoice**.
4. Select one of the radio buttons on the **Invoice Orderline Options** screen. Choose **Allow selection of orderliness for invoices** if you want to be able to decide which lines to invoice.
5. Select **Populate invoice line amount from order line** to use the existing orderline price.
6. In the **Invlines** tab, click on the first title you wish to invoice.
7. On the **Invoiceline** screen,enter the price in the **Amount** field and Today in **Date Paid** field. Selecting Today will Pay Invoice immediately without the additional Pay Invoice step. Make changes to any other fields that you require. Click the **Modify Invoiceline** button.
8. Complete the details for each title you wish to invoice.



9. When you have completed all of the Invlines the Amount paid on the Invoice screen should match the amount on your paper invoice.
10. You can click on **Lock Invoice** if you have finished all activity with this invoice and wish for no further changes to be made.

ADD ORDERED ITEM TO CATALOGUE (Creating holdings)

1. Select the **Add Ordered Items to Catalogue** wizard.
2. Search for the item you want to load.
3. Click on **Load Ordered Copies**
4. Click **Add / Update Items**



5. **C**omplete the **Holding Code, New Call Number, Class Scheme**, and Barcode (**New Item ID**) as required.
6. Click on **New Search** to load further copies