Unit 1: Overview of the Acquisitions/Serials Module

Acquisitions and Serials functions are combined into a single module in LINCC. The module consists of menu items, search bars, a Navigation Tree that groups major functions under six activity tabs, an upper pane that generally contains list views of records, and a lower pane that generally contains details of the record selected in the upper pane.

This manual describes the module’s acquisitions functions. For a description of serials functions, refer to the *LINCC Serials* manual.

Lesson 1: Navigating the Acquisitions/Serials Module

The Acquisitions/Serials module interface is illustrated below. Each area of the interface is described on the following pages.

Figure 1: The Acquisitions/Serials Module Interface
The areas of the Acquisitions/Serials module interface are described below.

**Menu Bar**
Contains commands for features of the module, grouped in drop-down menus.

**Serial Bar**
Used for serials functions; described in the *LINCC Serials* manual.

**Order Bar**
Allows a specific order record to be retrieved by matching the search parameter selected from the drop-down list. The search is performed on existing orders, not the LINCC database.

**Invoice Bar**
Allows a general invoice and its line items to be created and retrieved.

**Navigation Tree**
Contains nodes that can be selected to access information or perform specific activities within the module. Options vary according to the selected activity tab.

**Upper Pane**
Displays information related to the node selected in the Navigation Tree and generally contains list views of records.

**Lower Pane**
Displays information related to the record selected in the upper pane.

**Activity Tabs**
Correspond to major activities within a specific module. When an activity tab is clicked, the Navigation Tree and upper and lower panes display related information and options.

**Application Toolbar**
Allows other modules to be opened from the Acquisitions/Serials module.
Lesson 2: Using the Menu Bar

The most commonly used acquisitions menu options are described in this lesson.

### The ALEPH Menu

- **Connect to**: Determines which bibliographic database is being accessed. The only setting is the college’s administrative database, XXX50 (where XXX stands for the three-letter college code).
- **Delete Item Defaults**: Deletes defaults saved to item records when the Save Def. function is used.
- **Delete Subscription Defaults**: Deletes defaults saved to subscription records when the Save Def. function is used.
- **Delete Order Defaults**: Deletes defaults saved to order records when the Save Def. function is used.
- **Show PC/Server Transaction Log**: Displays the actions taken between the local computer and the server, including: database, date/time, service number, and service description.
- **Print History**: Displays the history of files printed during the active session.
- **Options**: Allows customization of some aspects of the LINCC client.
- **Switch Application**: Opens other LINCC modules.
- **Version Check**: Allows updates to the LINCC client to be automatically downloaded and installed.
- **Exit**: Closes the Acquisitions/Serials module.

### The View Menu

- **Switch to Order Tab**: Displays Order activity tab options in the Navigation Tree.
- **Switch to Invoice Tab**: Displays Invoice activity tab options in the Navigation Tree.
- **Switch to Admin. Tab**: Displays Administration activity tab options in the Navigation Tree.
- **Switch to Index Tab**: Displays Search Order activity tab (Index List) options in the Navigation Tree.
- **Switch to Serial Tab**: Displays Serial activity tab options in the Navigation Tree.
- **Clear Order/Serials**: Clears order or serial records being displayed.
- **Clear Invoice**: Clears the invoice being displayed.
- **Full Screen**: Not used.
The Utilities Menu

- **Return Item from Routing Group**: Displays a dialog box to check-in an item that was previously checked out to the group leader of a routing list.

- **Remove User from Routing Groups**: Displays a window with options to remove a user from every routing group of which the user is a member.

- **Item Process Status**: Displays a window with options to change the item process status of a selected group of items.

The Order Menu

- **Catalog Order**: Used to create a brief bibliographic record to attach to an order.

The Services Menu

- **Orders and Claims**: Contains services and reports that can be used when sending orders or claiming materials. This includes the Claim Report and Letters for Monograph Orders, and Send List of Orders to a Vendor service.

- **Retrieve and Print Acquisitions Records**: Contains reports and the General Retrieval Form that can be run in conjunction with the Print Acquisitions Records service. The reports include Partially Filled Monograph Orders, Monograph Orders Status NEW, and No Invoice reports.

- **Budget Management**: Contains services for managing budgets including the Open Annual Budgets service, and two budget reports. Choices include the Open Annual Budget and Transfer Remaining Balance services, and the Budget Summary and List of Orders per Budget reports.

- **EDI**: Contains services related to Electronic Data Interchange.

- **Other**: Contains one report and several services that can be used with acquisitions functions.

- **Statistics**: Contains a statistical report.

- **General**: Not used.

- **Manage Database Tables**: Not used.

- **Serials**: Contains several reports and services that can be used when managing serials, including Claim Letters and Reports, a Report of Routing Lists, List of Serial Titles and Number of Arrived Issues, and the Bind Alert Report.

- **Custom Services**: Contains specialized reports and processes.
Lesson 3: Using the Order and Invoice Bars
The Order and Invoice bars, located below the Menu bar, are used to retrieve and display useful information about a selected record or invoice.

The Order Bar
The Order bar allows a specific order record to be retrieved by matching the search parameter selected from the drop-down list. The search is performed on existing orders, not the LINCC database.

To use the Order bar:

1. On the **Order bar**, click the arrow next to the first field to view available options, and then select a search type.
2. In the adjacent search field, enter the search term or number that corresponds to the selected search type.
3. Click the blue arrow.

The following search types are available on the Order bar:

- **BIB Sys No.**: Used to locate an order by system number. If the number exists, but is not linked to an order, the option to add an order will become available in the upper pane.
- **ADM Sys No.**: Used to locate an order by administrative system number. If the number exists, but is not linked to an order, the option to add an order will become available in the upper pane.
- **Order Title**: Used to perform a title search of existing orders. If the title ($245$) is found, the order record will be displayed. If a partial title is entered, or if the title is not found, the message “Cannot find a single match. View index list?” will appear. Clicking Yes will display the Order Index.
- **Order Number**: Used to perform a numeric search for the order number. If found, the order will appear in the upper pane. If the number does not exist, the message “Cannot find any match. View index list?” will appear.
- **Order Number 2**: Used to perform a search of data recorded in the Order Number 2 field. If more than one record contains the search term entered, the message “Cannot find a single match. View index list?” will appear. Clicking Yes will display the Order Index containing the matching entries.
- **Vendor Reference**: Used to perform a search of data recorded in the Vendor Reference field. If more than one record contains the search term entered, the message “Cannot find a single match. View index list?” will appear. Clicking Yes will display the Order Index containing the matching entries.
- **ISBN**: Used to perform a search of order records for the ISBN.
The Invoice Bar

The Invoice bar allows a general invoice and its line items to be created and retrieved.

To use the Invoice Bar:

1. On the **Invoice bar**, click the list icon to view the vendor list, and then select a vendor.
2. In the adjacent field, enter the invoice number, and then click the blue arrow (or click the arrow to view available options, and then select the invoice).

Lesson 4: Using Activity Tabs

The Acquisitions/Serials module contains six activity tabs, available above the Navigation Tree.

The information displayed in the upper and lower panes and the options in the Navigation Tree are determined by the selected activity tab. The activity tabs included in the Acquisitions/Serials module are the Order, Invoice, Administration, Order Search, Serial, and Search activity tabs. These tabs and the options available in the Navigation Tree are described in this lesson.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
<th>View in Navigation Tree</th>
</tr>
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<tbody>
<tr>
<td>![icon]</td>
<td><strong>Order</strong> activity tab is used to process an order.</td>
<td>![navigation tree]</td>
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</tbody>
</table>
The **Invoice** activity tab is used to process an invoice.

The **Administration** activity tab is used to work with budgets and vendors.

The **Order Search** activity tab is used to access the Index List and to process bulk ordering and bulk arriving.

The **Serial** activity tab is used to work with serials.

The Serial activity tab is used for serials functions and is explained in the *LINCC Serials* manual.
The **Search** activity tab is used to perform Find and Browse searches for bibliographic records using a variety of parameters.