WorldShare® Acquisitions: Managing Standing Orders

Overview

The library places a standing order for a publication with the vendor/publisher/supplier. The supplier will send titles to the library as they are published. A standing order may be for a book series in which each publication has a different individual title which can be classified separately or classified together. In the workflow described here, all publications received for the standing order will be added to the standing order you create in WMS, but will be cataloged separately using a different bibliographic record for each publication. You may choose to treat some publications you receive on standing order as serials (e.g., for an annual that has the same title each year). In this case, new editions/volumes are received on the same serial record and you would follow the workflow for ordering and renewing serials.

- Create the Standing Order in WMS Acquisitions
  - Select Orders from the left navigation panel
    - Click on Orders and then click New Order
    - Type an order name (e.g. the name of the book series) and select the order type Standing Order from the dropdown list
    - Type the vendor name. As you type the first few letters, vendors beginning with those letters will display in a drop-down list. Select the vendor.
    - Optionally, add a comment indicating if the titles should be classified separately or together
    - Click Save

- Search WorldCat for New Standing Order Items
  - Select Discover Items
    - Search for a record in WorldCat for the specific title or annual edition
    - Click on the Add to dropdown from the search results screen and select order

- Add Title to Standing Order in WMS
  - On the Add item to Order screen:
    - Check that the Acquisitions type is set to One-Time
    - Check that the Processing type is set to Monograph for single-part monographs and Serial for multi-part monographs
Optionally, select an ISBN

Apply an Order Item Template that you’ve previously created that includes a fund, a holding location and a shelving location (optional but recommended).

Click on Add in the Action column across for the new Standing Order that you just created.

Then, on the same screen, click on the Receive item link that appears. This takes you to Receive and Invoice.

- **Receive and Invoice the Item**

  - You can receive and invoice the title at this point, or you can just receive it and invoice later. To receive and invoice, follow these steps. After clicking on the Receive link that appears on the Add Item to Order screen:
    - Select Receive and Invoice for the Action if not already selected.
    - Click on New Invoice and add an Invoice number, vendor and date and click on Save.

    - If the item is a single part monograph, the Monograph tab should be selected and you will see an option to edit the call number and add a barcode. Scan or type in the barcode and hit enter on your keyboard to receive the item and add the holding, making it available for circulation and discovery.

    - If the item is a multipart monograph, the Serial tab should be selected and you will see an option to Start receiving. Click on Start. If you’ve received all the volumes of the multi-part item you expect to receive, click on Finish. The holdings are added in a separate step.*

    - Click in the Items Processed area on the bottom of the screen. You can go directly to the invoice by clicking on the hyperlink to view it or pay it or mark it ready to pay.

*See Adding Monograph Holdings: Add holdings for multi-part monographs