

Acq Reports – I didn't know that!

UMWUG, 2013

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Transfer orders from budget to budget (acq-31)

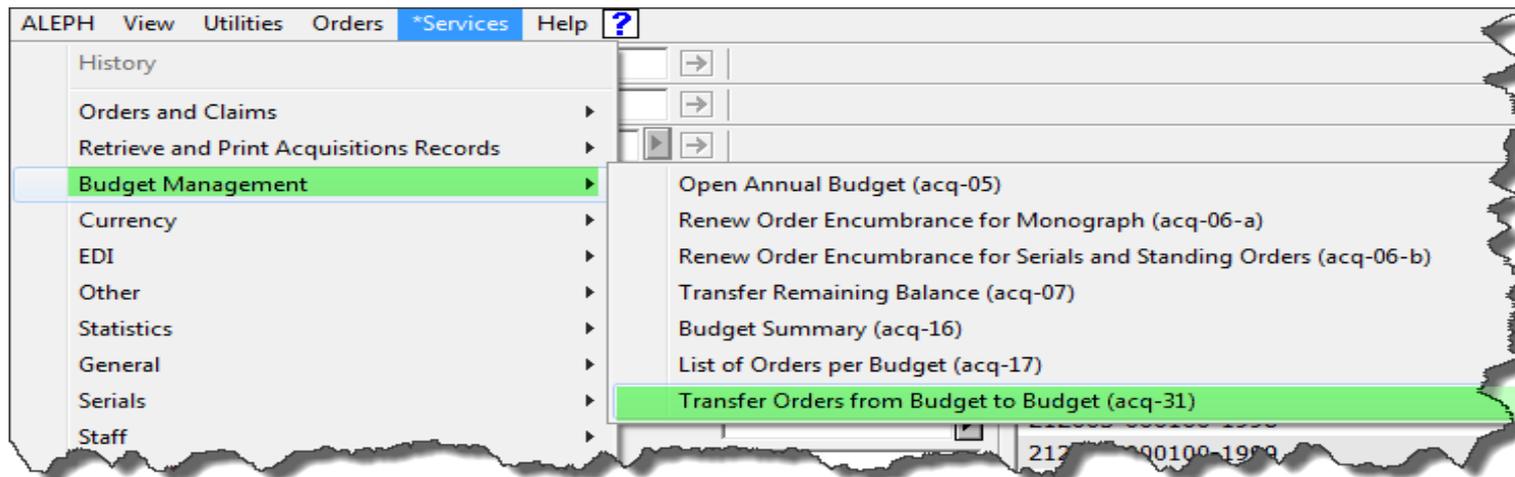


What it does

- Transfers encumbrances from one budget to another on active orders only (not CLS, VC, DNB, LC, etc.)
- Produces two reports
 - List of orders that did not pass the checks and were rejected
 - List of orders that did pass the checks and were transferred

Possible Uses

- Budget codes are changing - need to move encumbrances to the new budget codes
- Ran FY rollover but “NEW” orders do not transfer



Transfer Orders from Budget to Budget (acq-31) - SCS50

* Input File

* Report Output Name

* Reject Report Name

Update Database Yes No

* Transfer to Budget Code: ...

Report Format: Standards Form

Runtime: Today

At: O'clock:

Library: SCS50

Print ID:

Report Language:

Submit

View History

Cancel

Help

Add to History

St. Cloud State University

Old Fund Structure- FY 2013



New Fund Structure – FY2014



Ran the normal FY Rollover process



Old Budget 2013



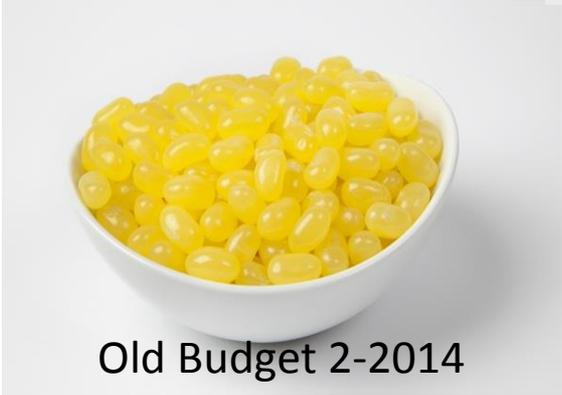
Old Budget Structure 2014

SCS manually created their new 2014 structured budgets





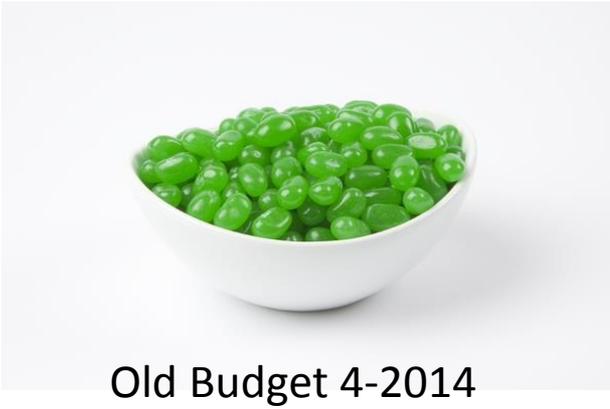
Old Budget 1-2014



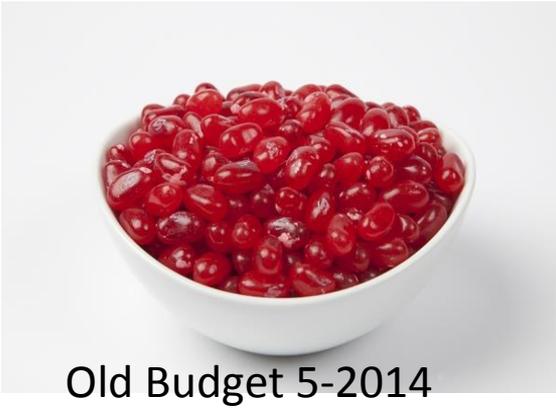
Old Budget 2-2014



Old Budget 3-2014



Old Budget 4-2014



Old Budget 5-2014

Input File	<input type="text"/>
* Output File	<input type="text" value="serialtransfer1"/>
Use Hierarchy Budget	<input type="radio"/> Yes <input checked="" type="radio"/> No
Retrieve By:	<input type="text" value="Order type"/> <input type="text" value="S"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Retrieve By:	<input type="text" value="Order status"/> <input type="text" value="SV"/> <input type="text"/> <input type="text"/> <input type="text"/>
Retrieve By:	<input type="text" value="Budget number"/> <input type="text" value="212003-EBSCO-2014"/> <input type="text" value="212003-2014"/> <input type="text" value="212003-MICRO-2014"/> <input type="text" value="212010-EBOOK-2014"/> <input type="text" value="212010-ESERIALS-2014"/>
Retrieve By:	<input type="text" value="000"/> <input type="text"/> <input type="text"/> <input type="text"/>

Submit
View History
Cancel
Help
 Add to History
 Online

Print Acquisition Records (acq-03) - SCS50

* Input File

* Output File

- Report Format
- ADM doc. no
 - Sublibrary
 - Order Unit
 - Open Date
 - Order Logger Date
 - Order Type
 - Number of Units Ordered

Runtime:

At: O'clock:

Library:

Print ID:

Report Language:

Submit

View History

Cancel

Help

Add to History

Online

07/03/2013

order-info-report-00

Order Info Report

Order Number	Budget Number	Z13 Title
S-0261558	212003-EBSCO	Focus on exceptional children.
S-0270851	212003-EBSCO	Journal of drug education.
S-0836778	212003	Educators' guide to free health, physical education and recreation materials.
S-0404271	212003-EBSCO	Psychology today.
S-0259632	212003-EBSCO	The Economist.
S-0258982	212003-EBSCO	Dollars & sense.
S-0261629	212003-EBSCO	The French review.
S-0837143	212003	The Municipal year book.
S-0293355	212003-EBSCO	Psychological reports.
S-0293417	212003-EBSCO	Psychological review.
S-0260684	212003-EBSCO	English journal.
S-0269845	212003-EBSCO	Journal of clinical psychology.
S-0421181	212003-EBSCO	Smithsonian.
S-0863364	212003-EBSCO	Yearbook of physical anthropology.

Transfer Orders from Budget to Budget (acq-31) - SCS50



* Input File

* Report Output Name

* Reject Report Name

Update Database Yes

No

* Transfer to Budget Code:

Report Format

Runtime:

At: O'clock:

Library:

Print ID:

Report Language:

Add to History

07/03/2013

transfer-order-encumbrance-00

Transfer Order Encumbrance from Budget to Budget Report

Bib Info:	Title:	Order Number:	From Budget:	To Budget:	Original ENC Amount:	Active ENC Amount:	Note:
Shelved by title Focus on exceptional children.. [Denver, Love Pub. Co.] v. ill. 28 cm.. [000787444]	Focus on exceptional children.	S-0261558	212003-EBSCO-2014	SERDAT-2014			
Shelved by title Journal of drug education.. [Farmingdale, N.Y.] Baywood Pub. Co.. 23 cm.. [000806055]	Journal of drug education.	S-0270851	212003-EBSCO-2014	SERDAT-2014			
Z6121 Educators' guide to free health, physical education and recreation materials.. Randolph, Wis., Educators' Progress Service.. v. 28 cm.. [000809299]	Educators' guide to free health, physical education and recreation materials.	S-0836778	212003-2014	SERDAT-2014			
Shelved by title Psychology today.. [New York, NY, etc., Sussex Publishers, etc.] v. ill. 28 cm.. [000810245]	Psychology today.	S-0404271	212003-EBSCO-2014	SERDAT-2014			
Shelved by title Economist (London, England) : The Economist.. London, The Economist Newspaper Ltd. [etc.] v. 33 cm.. [000810267]	The Economist	S-0259632	212003-EBSCO-2014	SERDAT-2014			
Shelved by title Dollars & sense.. [Somerville, Mass., Economic Affairs Bureau, etc.] no. ill. 28 cm.. [000818012]	Dollars & sense.	S-0258982	212003-EBSCO-2014	SERDAT-2014			
Shelved by title The French review.. Champaign, Ill. [etc.] American Association of Teachers of French.. port. 24 cm.. [000821311]	The French review.	S-0261629	212003-EBSCO-2014	SERDAT-2014			
JS344.C5 The Municipal year book.. Washington [etc.] International City Management Association.. v. 25 cm.. [000821385]	The Municipal year book.	S-0837143	212003-2014	SERDAT-2014			
Shelved by title Psychological reports.. Missoula [etc.] : Psychological reports.. v. : ill. : 23 cm.. [000826250]	Psychological reports.	S-0293355	212003-EBSCO-2014	SERDAT-2014			

Transfer Orders from Budget to Budget (acq-31) - SCS50



* Input File

* Report Output Name

* Reject Report Name

Update Database Yes No

* Transfer to Budget Code:

Report Format

Runtime:

At: O'clock:

Library:

Print ID:

Report Language:

Add to History

Budget Transaction List

1. Budget Info 1 | 2. Budget Info 2 | 3. Balance | 4. Transactions | 5. Sublibraries

All
 Initial Allocation
 Allocation
 Carry Over
 Transfer

Filter
Allocate
Print
Transfer

Type	Date	Local Amt	C/D	Paid	Order	Invoice
ENC	07/03/13	3000.00	D		S-1048832	
ENC	07/03/13	14476.00	D		S-0849764	
ENC	07/03/13	0.00	D		S-1023653	
ENC	07/03/13	0.00	D		S-0286782	
ENC	07/03/13	12754.00	D		11413	

Statistical Abstract Order

The screenshot displays a library system interface. At the top, there are input fields for 'BIB Sys No.' and 'Order number'. The 'Order number' field contains the text 'BIB= 7683475;ADM= 7683475 - Statistical Abstract of the United State (). Year.'. Below this is a navigation bar with icons and a tab labeled 'Order Budget'. On the left side, there is a sidebar menu with options: '[1] Functional', '[2] Overview', '[L] Order List (1)', and '[0] Order (57983 - 0042527)'. Under the order, there are sub-items: '[E] Encumber', '[I] Invoice', '[A] Arrival', '[S] Items/Subscriptions (1 st', '[C] Claims (0)', and '[C] Order Log (07/03/13)'. The main area shows a table with two columns: 'Budget number' and 'Enc/Active Amount'. The table contains two rows: '212010-FTINDEX-2013' and 'SERDAT-2014'. The second row is highlighted in blue. To the right of the table are buttons for 'Add Budget', 'Encumber', 'Delete Budget', and 'Balance'.

Budget number	Enc/Active Amount
212010-FTINDEX-2013	
SERDAT-2014	











The End

