

MIT Libraries Monograph Acquisitions
C.Follett, last revised 10/26/01

Invoicing/Arriving and Barcoding
YBP Firm Orders (VC=YBPG-M)
In Aleph Acquisitions 10/26/01

INVOICING/ARRIVING

I. INVOICE

1. Separate copies of YBP invoice – all pink sheets, in numerical order, should be stapled on top of all the original white sheets (toss the blue and duplicate white copies.)
2. Write your initials and today's date in top right corner of p.1, pink copy

II. IN ALEPH



A. Click the General Invoice icon

1. In "Select or Create General Invoice" window, **type YBPG-M** in Vendor Code and then **type the invoice number**, then **Click OK**.
 - a. In "General Invoice Form" window, **edit** following fields as follows:
 - *Status: **CHK**
 - *Net Amount: **enter Invoice Total**
 - *Invoice Date: **click arrow and select date on invoice from calendar**
 - b. **Click Refresh**, then **OK**.

B. Back in "General Invoice & Line Items" Window, click Add.

1. In "Order Number" Window, **Click Arrow** 
2. In "Order Index" Window, **select RF**



In "Enter starting point" field, **type in** the YBP confirmation number from invoice (appears above title, usually beginning 99....), then **hit Enter**. Number you entered should appear as highlighted in blue, in the bottom half

of the window.

3. **Click "View Order"** button and verify that the order matches the book.
4. From the "Order Details for Admin Record" Window, **write the Order number on the invoice, above title AND** using pencil, **write this same number** in the book – turn to verso of title page, and write in the upper left hand corner of the opposite page (right side of book.)
5. In the "Order Details" window, scroll down and verify the following information:

- *Arrival Status: N
- *Invoice Status: None
- *Budget : Should end in –2002, if not, make a note of this budget name

6. **Close** the “Order Details” window; back in “Order Index List” window, **Click “Select.”**

7. In “Line Item” Window, edit these fields:

- *List Price – **key in NET AMOUNT** from YBP invoice (price in far right column of invoice)

- *Net Amount – again, **key in NET AMOUNT** from YBP invoice

****IF** you noted a –2001 budget earlier:

- ***Click “Budgets**

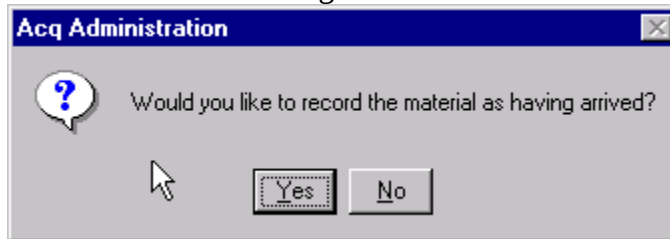
- *In “Budget List of Invoice” Window, **Click in** “Budget Codes to Add” and type the Budget Name.

Example: **M-RTC-ARTH-2002**

- ***Click “Add Budget,”** then **Click “Close.**

- ***Click “Refresh”** then **“OK”**

8. **Click “Yes”** in the following window:



IF you get a message **“Library Note attached to order,”** write a **“P”** on the invoice, to the left of title, as a note to yourself.

9. On the paper copy of invoice, **make a check mark** next to both the title and the price.

REPEAT STEPS B. 1 through 9 for all items on the invoice.

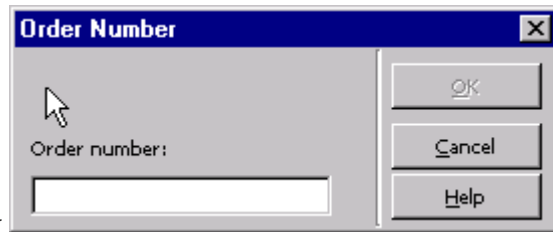
C. WHEN ALL Items have been added to the invoice

1. Back in the “General Invoice & Line Items” Window, **click “Close”**

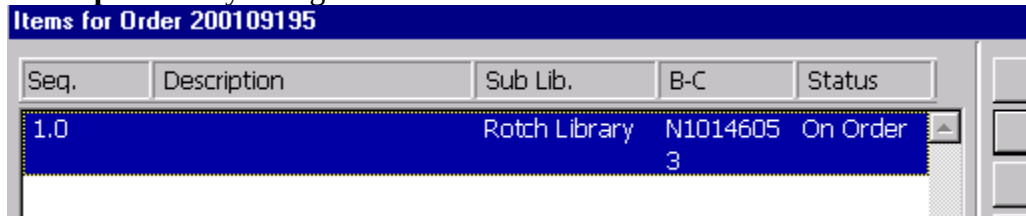
*****IF** you get an “unbalanced” message, get Garry or Charlene.

BARCODING

A. Click the 1234 icon



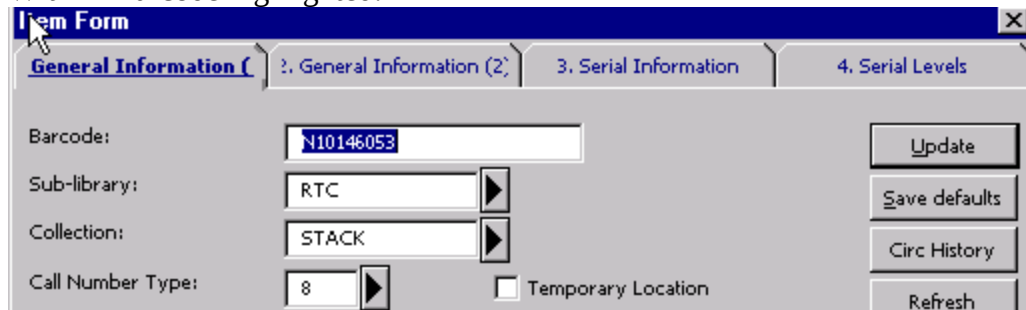
1. In “Order Number” Window
Key in the Order Number, hit “Enter.”
2. Confirm that title matches the book in hand.
3. Click “Copies” and you’ll get the “Items for Order” Window.



Seq.	Description	Sub Lib.	B-C	Status
1.0		Rotch Library	N1014605 3	On Order

Note that a “dummy” barcode, beginning with “N” appears.

4. In the “Item Form” Window, confirm these fields:
 - *Material Type: **BOOK**
 - *Item Status: **01 or 02**
 - *Item Process Status: **IP**
5. With N-Barcode highlighted:



WAND in the barcode that you place in the back of the book.

6. They system will put you back in the “Items for Order” Window, with the new barcode displayed and Status of “Receiv/Not Aval”

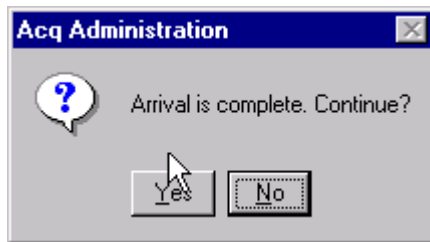
Items for Order 200109195				
Seq.	Description	Sub Lib.	B-C	Status
1.0		Rotch Library	39080022 969106	Receiv/No t Aval

****IF RECEIV status is not displaying, Click Modify again and verify information in fields as listed in STEP 4 above.**

****IF there are more than one copy (or a book and disk,) repeat steps 3-6. See Garry or Charlene if there aren't enough items online for the number of pieces you need to barcode.**

7. Click “Close.”

B. Back in “Order List” Window, if you noted that you needed to PRINT the Library Note, Click “Arrival,” and then Click “Yes”



and then **Click “Print.”**

1. In the Notepad window that appears, **click “File” and Select “Print.”**
***IF** the Library note says **“See Order Log,”** Garry or Charlene will show you how to print using SNAGIT.
Close Notepad and “Arrival List” Window.
2. Fold the printout in half, with writing out, and put in the book.

C. Back in “Order List” Window, check the following fields:

- *Inv St : CMP
- *Arr St: CMP

*IF they don't AND the invoice and arrival are indeed complete, Click **"Modify"** and check the "Invoice Status Complete" and "Arrival Status Complete" buttons.

Order Form - Kazmir Malevich e le sacre icone russe. Avanguardia e tradizioni. / Ed. by ...

1. Order Information 2. Vendor 3. Quantity and Price

Order number 1: 200109195 Order status: SV OK

Order number 2: 2001007837 Order number 3: MONO Save Def

Order ISBN/ISSN: 884357616x Order group: Refresh

Open date: 13/Dec/2000 Status date: 13/Dec/2000

Order date: 13/Dec/2000 Invoice Status "Complete"

Arrival Status "Complete"

Click **"Refresh"** and then **"OK."**

D. PHYSICAL PROCESSING of the book

1. Date stamp the verso of title page, centered, as close to bottom of page as possible, without covering any printing in the book.
2. Top edge stamp the name of the library
3. Insert a white flag, and any other flags as appropriate (Rush, Attn:, etc.)
4. Count on your statistics

E. Repeat steps A-D for remaining books

F. At end of shift, transfer all completed books to the truck in Bruce's cubicle.