

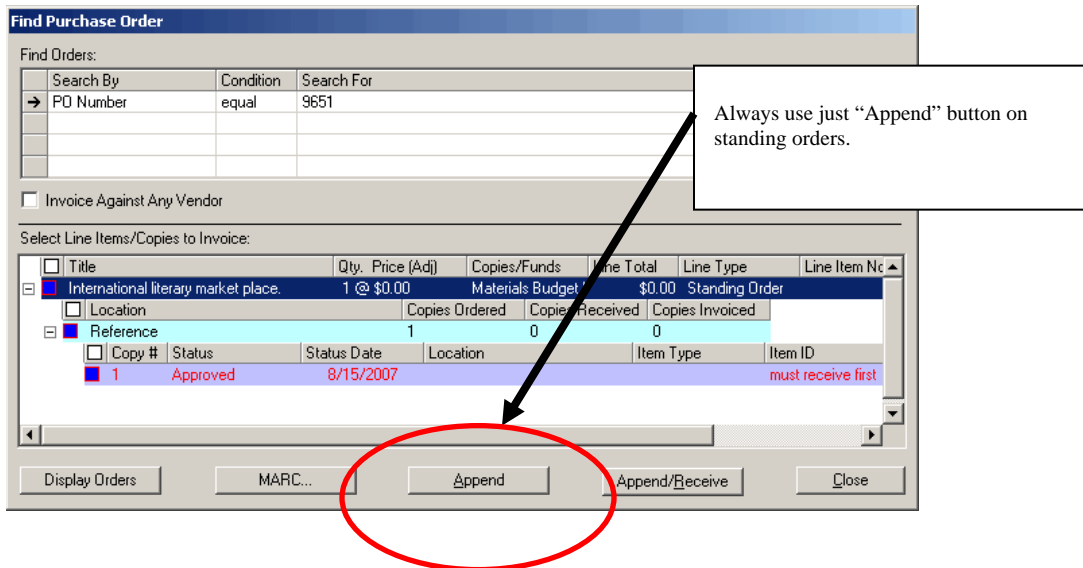
STANDING ORDER RECEIVING

Procedures Manual

8/15/07

The most common problem in receiving standing orders is that they should not get tagged “received” in Voyager until they reach their end.

Specifically, when one enters a new invoice into Voyager and attaches it to the standing order’s purchase order for the title, use the “APPEND” button. Not “Append/Receive” as you would for firm orders. Example:



Maintained this way, the purchase order line item copy status remains “Approved” and the invoice item status is “Invoiced”, meeting one of the categories of orders eligible to roll over from one fiscal year to the next.

Most libraries would handle standing orders this way with one additional twist. After just “appending” new invoices as above, they would also receive the specific volume on an attached component record (as we do with our subscriptions). That would make the purchase order line item copy status read “Received Partial” and the invoice item status still “Invoiced”, which is another category of orders that are eligible to roll over into the next fiscal year.

For more background information on which combinations of open orders are considered eligible to roll over into the next fiscal year, see the Voyager Acquisitions User’s Guide, p. 16-5 to 16-6.

For viewing the long-standing Voyager enhancement request to “grey-out” the Append/Receive button on any standing order, see Endeavor’s Knowledge Base problem number #90238.