Default values in Acquisitions

Find the available default reference data values for Acquisitions in OLIB.

Overview

Streamline ordering workflow by setting up these reference data defaults. Acquisitions reference data can be configured in advance so that the ongoing operation of the ordering process is much quicker.

Defaults can be set at various levels in OLIB, with the lowest level taking precedence:

- System-level - System Administration> OLIB Defaults and Admin Client Defaults
- Location-level - User Management> Locations
- Supplier-level - Acquisitions> Publishers/Suppliers
- Supplier/location-level - Acquisitions> Publishers/Suppliers: Supplier Details: Location Level Defaults. Location Level Defaults allow you to set up default values for each Location in your system against a Supplier record. See About adding Supplier/Location-level defaults below.
- Supplier/media type-level (discount rate, tax rate, claim sequences only) - Acquisitions Reference Data> Supplier/Media Types

For example, a default value for Payment Account at Supplier level will take precedence over Payment Account that might also be set at Locations level.

If you operate as a 'single-site' system for acquisitions, you can just set your defaults at the highest System-level (OLIB Defaults).

Orders defaults

For each field listed in the table below, check what level you would like to set the default value at.

<table>
<thead>
<tr>
<th>FIELDS</th>
<th>COMMENTS</th>
<th>OLIB DEFAULTS</th>
<th>ADMIN CLIENT DEFAULTS</th>
<th>LOCATIONS DOMAIN</th>
<th>SUPPLIERS/PUB DOMAINS</th>
<th>SUPPLIER - LOCATION</th>
<th>SUPPLIER - MEDIA TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default order location</td>
<td>Specifies what the ordering location should default to when a</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FIELDS</td>
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</tr>
<tr>
<td>--------</td>
<td>----------</td>
<td>---------------</td>
<td>-----------------------</td>
<td>------------------</td>
<td>------------------------</td>
<td>---------------------</td>
<td>----------------------</td>
</tr>
</tbody>
</table>

A new order or order item is created.

- No default (i.e. the ordering location field will not default to anything)
- User's location (the ordering location field will default to the currently logged in user's location)
- Client location (the ordering location field will default to the Admin Client Location)
- A specific location (the locations are listed)
<table>
<thead>
<tr>
<th>FIELDS</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplier</td>
<td>Includes a No default option so that a location can stipulate that it does not want a default supplier even if a system-level default supplier is set for all other locations. If the location-level field were simply left blank rather than set to No default the system-level default supplier would be picked up for that location, which may not be required.</td>
</tr>
</tbody>
</table>

| Supplier reference | Enter * [star] at supplier/loc level to |

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Includes a No default option so that a location can stipulate that it does not want a default supplier even if a system-level default supplier is set for all other locations. If the location-level field were simply left blank rather than set to No default the system-level default supplier would be picked up for that location, which may not be required.
prevent a higher-level default from being picked up. (This is displayed as No default in the supplier/loc defaults list). Enter : [colon] to clear an existing supplier/loc default so that a higher-level default is picked up.

Delivery method

Includes a No default option (except at system level) so that you can prevent a higher-level default from being picked up. Also includes a <NULL> option in supplier/locs to clear an existing supplier/loc default.

<table>
<thead>
<tr>
<th>FIELDS</th>
<th>COMMENTS</th>
<th>OLIB DEFAULTS</th>
<th>ADMIN CLIENT DEFAULTS</th>
<th>LOCATIONS DOMAIN</th>
<th>SUPPLIERS/ PUB DOMAINS</th>
<th>SUPPLIER - LOCATION</th>
<th>SUPPLIER - MEDIA TYPE</th>
</tr>
</thead>
</table>

Delivery method

- ✓
- ✓
- ✓
- ✓

https://help.oclc.org/Library_Management/OLIB/Acquisitions/Set_up_Acquisitions/Default_values_in_Acquisitions

Printed: Sun, 20 Mar 2022 01:46:08 GMT
<table>
<thead>
<tr>
<th>FIELDS</th>
<th>COMMENTS</th>
<th>OLIB DEFAULTS</th>
<th>ADMIN CLIENT DEFAULTS</th>
<th>LOCATIONS DOMAIN</th>
<th>SUPPLIERS/PUB DOMAINS</th>
<th>SUPPLIER - LOCATION</th>
<th>SUPPLIER - MEDIA TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency</td>
<td>Includes a No default option (except at system level) so that you can prevent a higher-level default from being picked up. Also includes a &lt;NULL&gt; option in supplier/locs to clear an existing supplier/loc default.</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

**Order Items defaults**

For each field listed in the table below, check what level you would like to set the default value at.
<table>
<thead>
<tr>
<th>FIELDS</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create copy</td>
<td>Includes a No default option (except at system level) so that you can prevent a higher-level default from being picked up. Also includes a &lt;NULL&gt; option in supplier/locs to clear an existing supplier/loc default.</td>
</tr>
<tr>
<td>Delivery period</td>
<td>Enter -99999 at supplier/loc level to prevent a higher-level default from being picked up. (This is displayed as No default in the supplier/loc defaults list). Enter -99998 to clear an existing supplier/loc default so that a</td>
</tr>
</tbody>
</table>
higher-level default is picked up.

Copy location
Defaults to the ordering location when a new order item record is created.

Sub-location
Defaults from the selected copy location's default sub-location.

Shelf
Defaults from the selected copy location's default shelf.

Copy category
Includes a No default option (except at system level) so that you can prevent a higher-level default from being picked up. Also includes a <NULL> option in supplier/locs to clear an existing supplier/loc
Optionally select the Default Copy Status for all Copies created. This applies to the Location you are logged in as when cataloguing the Copies. Note this takes precedence over the Default Copy Status set in Admin Client Defaults. Includes a No default option (except at system level) so that you can prevent a higher-level default from being picked up. Also includes a <NULL> option in supplier/locs to clear an existing supplier[loc default.

<table>
<thead>
<tr>
<th>Copy status</th>
<th>✔</th>
<th>✔</th>
<th>✔</th>
<th>✔</th>
<th>✔</th>
</tr>
</thead>
</table>

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Includes a No default option (except at system level) so that you can prevent a higher-level default from being picked up. Also includes a <NULL> option in supplier/locs to clear an existing supplier/loc default.

Note that this is an Account rather than an Account Instance. Specifying an account rather than an account instance means that you won’t have to change your defaults when you roll over your account instances to the next financial period. Whilst placing the order, OLIB

https://help.oclc.org/Library_Management/OLIB/Acquisitions/Set_up_Acquisitions/Default_values_in_Acquisitions

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selects the 'current' Account Instance automatically (ie the one that covers the date on which the order is being placed).

Discount rate

Can Cancel Invoiced Orders (Y/N)
Set to Yes if you want to be able to cancel an outstanding order item, even though an invoice has already been completed for it. The default behaviour - <NULL> or No, means that staff cannot cancel outstanding order items if an invoice has been completed for it.

Tax rate

Claim Sequence
About adding Supplier/Location-level defaults

These defaults are for each Location for a given supplier. For example the Dawson Books defaults for the University Main Library; Dawson Books defaults for St. George's Library, and so on.

The OLIB interface allows for fast entry of the defaults for each Location:

1. Go to Acquisitions> Publishers/Suppliers and click the Supplier Details tab.
2. In modify mode, scroll to the foot of the sheet and select a Location from the drop down.
3. Select all the default values as they apply between this Supplier and the Location.
4. On completion click >>.

Note: To modify existing Supplier/Location defaults, select your location in the Location field and set the fields that you want to change to the required values. Click >> on completion. Only the fields that you entered a value in will be changed in your location's supplier/loc defaults record. If you leave a field blank, it will remain set to its previous value when you click the double-arrow button.

You can clear a field in your location's existing Supplier/Location defaults so that OLIB uses a higher level default. To do this, select the <NULL> value or some other special character as specified in the table above. Click >> on completion.

<Null>, No default, or None?

These options are available in many of the drop downs instead of choosing the reference data values.

- <NULL>: Available in Supplier/Locations. This means that any existing value will be cleared, so that a higher level default will apply.
- No default: Use this to prevent a higher-level default from being picked up.
- None: You can specify there should be 'none' in a field to indicate that the field should not default to anything when you create a new order/order item, i.e. so that a higher-level default is not picked up. The table indicates what to enter in each direct entry field to specify 'none' in that field.