Discover how to order, print, and invoice serial subscription orders in OLIB.
►Serials Management > Orders

Overview

The process of ordering, printing and invoicing for subscription orders, is very similar to monograph Acquisitions. The interface to the Funds module is identical.

Optionally, add more Serials> Subscription Types if needed, e.g. Subscription, E-Journal, Donation. These are used at Serial Copy level.

Place a subscription order

1. Navigate to Serials Management> Orders and create a new record.
2. Enter an Order Reference.
3. In Supplier, click Search and insert the correct Supplier for the order. The Order page is now populated with information from the supplier record e.g Delivery Method etc.
4. At the foot of the Order Items box, click New to access the Extended Order Items Layout.
5. Enter a Supplier Reference, search for the Title of the Serial, and insert it to the Order Item. This now displays a layout specific to Serials.
6. Some defaults are already provided but there are a number of fields which should be completed for a Serial subscription. Subscription Start Date / Subscription End Date enter these dates as they are required to manage the Re-subscription process.
7. In Date First Issue Due, enter the actual date the first issue is expected as this may be different from the publication date. This data is used by the Claims process.
8. The Destination Location defaults, but should be altered if required.
9. In No. Requested, enter the number of subscriptions you are placing. This determines how many Serial Copies are created.
10. Set Create Ser. Copies? to Yes for new subscriptions, otherwise the Serial Copies will not be created.
11. All other fields on the first page of the Order Item record are optional. Setting the Sample Issue field to Yes allows you to check in sample issues and subsequently reject them. This takes them out of the acquisitions process through a different route to just cancelling them.
12. Go to the Financial Details page and enter the Item Price.
13. Click Payment Accounts and select and insert the Account that is paying for this subscription.
14. When the Account is linked back to the Order Item, a confirmation screen will be displayed. When you confirm, the details are carried back to the Order Item form.
15. Save the Order Item and repeat the process for other subscriptions until all the Order Items are listed on the Order.
The Order should now be made Outstanding and saved.

Output orders

The procedure for outputting serial subscriptions is the same as the procedure for outputting standard orders.

Invoice

The common practice of journal subscription agents is to supply a bulk invoice ahead of the subscription year. When the actual price is known the agent sends a supplementary invoice or credit note. Sometimes invoices are not received in the same financial year that the order was placed. Through flexible invoicing, OLIB allows invoices to be paid from a different Account Instance from the one against which the funds were committed.