

Z68 - ORDER

This table contains acquisition order records. Each order creates a separate record.

The system differentiates between three types of orders:

Monographs (Z68-ORDER-TYPE=M) are single item, multi-copy and/or multi-volume orders of any material type - books, tapes, videocassettes, maps, etc. Once the material has arrived and the invoice has been paid, the order can be closed. If the material arrival status is registered as complete and the invoice payment status as paid, the system will do this automatically.

Serial orders (Z68-ORDER-TYPE=S) are orders for serials. This is a continuing order, which is open until canceled.

Standing Orders (Z68-ORDER-TYPE=O) are orders for monographs in series and other material where it is not clear when the material will arrive, and each item that arrives is individually invoiced.

These order types are handled differently by the system and have different mandatory fields.

For example, claiming of monograph and standing orders is based on the data of the Z68 table, while serials are claimed through the Serials function in the Acquisitions/Serials module (based on the data of Z16 - subscription information).

For standing orders it is possible to register "Max arrival days" (Z68-MAX-NO-ARRIVAL-DAYS). This is the maximum number of days that may elapse since the last volume was received. "Claims" for standing orders are generated after this time elapse.

The following fields are used for serial and standing orders:

Subscription start date and Subscription end date (Z68-SUBSCRIPTION-DATE-FROM / Z68-SUBSCRIPTION-DATE-TO) - the period for which the library subscribes to the publication.

Renewal date (Z68-SUBSCRIPTION-RENEW-DATE) - the date on which the subscription should be renewed (actually, the date up until which a subscription should be canceled).

Budget Cycle (Z68-SUBSCRIPTION-BUDGET-PERIOD) – defines the cycle of annual budgets that will be encumbered for the subscription.

In the following table, (X) denotes an alphanumeric field and (9) denotes a numeric field. All alphanumeric fields are left-aligned with trailing spaces; all numeric fields

are right-aligned with leading zeroes. Decimal positions are indicated by the symbol V. The total number of decimal digits is designated by the number of nines following the V. Note that the decimal point is not stored in the field (for example, if the field definition is 9(4)V99, then 1000 = 10.00).

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02 Z68-ORDER-STATUS       PICTURE X(3).
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| Z68-REC-KEY | | | |
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| Z68-DOC-NUMBER | M | 9(9) | DESC: System number of the administrative record to which the order is linked. CONV: ADM system number. |
| Z68-SEQUENCE | M | 9(5) Leading zeroes | DESC: Sequence number of the order under the ADM record. Used to distinguish between multiple orders placed for the same ADM record. CONV: Create consecutive numbers, with leading zeroes. Begin with 00001. Every order placed for the same Z68-DOC-NUMBER should be increased by one. |
| Z68-ORDER-TYPE | M | X(1) | DESC: There are three order types: monograph, serial and standing order. Values are: M = monograph S = serial O = standing order CONV: Relevant value. |
| Z68-ORDER-NUMBER | M | X(30) | DESC: Order number. In the Acquisitions/Serials module the number is added automatically from the “last-order-number” counter (UTIL G/2). The user is free to change the number, as long as the number is not already in use. CONV: Must be unique. Does not require leading zeroes. |
| Z68-ORDER-NUMBER-1 | O | X(30) | DESC: Optional. May be used to provide a supplementary order number. CONV: Blank or relevant alternative order number. |
| Z68-ORDER-NUMBER-2 | O | X(30) | DESC: Optional. May be used to provide an additional supplementary order number. CONV: Blank or relevant alternative order number. |
| Z68-ORDER-GROUP | O | X(10) | DESC: Optional. Used to provide a way to group orders, each group representing the desired filter. Orders may be grouped by librarian, subject, etc. Codes are defined in data_tab/ pc_tab_exp_field.lng. CONV: Blank or relevant group. |

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| Z68-OPEN-DATE | M | 9(8) Format: YYYYMMDD | DESC: Date the order was opened. CONV: Relevant date or conversion date. |
| Z68-ORDER-STATUS | M | X(3) | DESC: Processing status of the order. Values are: NEW = New WP = Waiting for processing PS = Processing started WB = Waiting for budget confirmation QSV = Query before sending CNB = Cancelled - No budget DNB = Delayed RSV = Ready to send to vendor SV = Sent to vendor VC = Vendor cancelled CLS = Order closed Values are defined in the tab/pc_tab_exp_field.lng table under the ACQ_ORDER_STATUS section. Note: If the user adds new order statuses, they will not be system generated and will have to be manually operated by the user. CONV: Relevant status. |
| Z68-ORDER-STATUS-DATE-X | | | |
| Z68-ORDER-STATUS-DATE | M | 9(8) Format: YYYYMMDD | DESC: Date the status of the order was last updated. CONV: Relevant date or conversion date. |
| Z68-ARRIVAL-STATUS | M | X(1) | DESC: Status of the arrived material. Values are: P = Partial C = Complete CONV: Relevant value, should match with the following: If Z78-NO-UNITS-ARRIVED is => than Z68-NO-UNITS then Z68-ARRIVAL-STATUS = 'C' else Z68-ARRIVAL-STATUS = 'P'. Additional check : if Z68-ORDER-STATUS = 'CLS' then Z68-ARRIVAL-STATUS='C'. Note: The actual display in the GUI also depends on the matching Z78 record. |

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| Z68-INVOICE-STATUS | M | X(1) | DESC: Status of the invoice. Values are: P = Partial C = Complete CONV: Relevant status. Note: The actual display in the GUI also depends on the matching Z75 record. |
| Z68-LAST-TOUCH-DATE | M | 9(8) | DESC: Not in use. CONV: Zeroes. |
| Z68-SUB-LIBRARY | M | X(5) Upper case | DESC: Sublibrary to which the order belongs. CONV: Sublibrary code as defined in the \$alephe_tab/tab_sub_library.lng table. |
| Z68-ALPHA | M | X(1) | DESC: ALPHA code of the record. Use L for all scripts (e.g. Latin, Greek, Cyrillic, etc.). CONV: L. |
| Z68-ORDER-DATA | | | |
| Z68-METHOD-OF-AQUISITION | M | X(2) | DESC: Method by which the item is acquired. Values are: P = Purchase PF = Purchase free G = Gift E = Exchange D = Deposit O = Other Values are defined in the tab/pc_tab_exp_field.lng table under the ACQ_ORDER_METHOD section. CONV: Relevant value. |
| Z68-ORDER-DATE | M | 9(8) Format: YYYYMMDD | DESC: Date the order was sent to the vendor. CONV: If Z68-ORDER-STATUS = 'NEW', put zeroes; else put the relevant date or conversion date. |

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| Z68-MATERIAL-TYPE | O | X(2) | <p>DESC: Material type of the ordered item. Example : M - Monographs S - Series F - Fiction N= Non-fiction A= Audio V= Visual Values are defined in the pc_tab_exp_field.lng table of the library's tab directory under the ACQ_ORDER_MATERIAL section. CONV: Relevant value or blank.</p> |
| Z68-LETTER-TYPE | M | 9(2) | <p>DESC: Order slip format that should be used when printing the order. CONV: Relevant format number, or 00 as default.</p> |
| Z68-ORDER-DELIVERY-TYPE | M | X(2) | <p>DESC: Method of delivering the order to the vendor. Values: LI = list - for orders that should be printed/e-mailed in by batch (p_acq_14). LE = letter - for orders that should be printed/e-mailed on-line (using the SEND option). CONV: Relevant value.</p> |
| Z68-SEND-METHOD | O | X(5) | <p>DESC: Method by which the order is sent. Relevant only for LE. Values: PRINT EMAIL EDI CONV: Relevant value. If Z68-ORDER-DELIVERY-TYPE = LE then put 'PRINT' or 'EMAIL'.</p> |
| Z68-DELIVERY-TYPE | M | X(2) | <p>DESC: The way in which the material is sent from the vendor to the library. Example: A= Airmail S= Surface mail C= Courier Values are defined in the pc_tab_exp_field.lng table of the library's tab directory under the ACQ_ORDER_MAT_DEL section. CONV: Relevant value.</p> |

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| Z68-RUSH | M | X(1) | DESC: Urgency of the material. Values are: Y = Yes N = No CONV: Relevant value. |
| Z68-EDA | M | 9(8) Format: YYYYMMDD | DESC: Claim date. Can be manually reported in online system. If not reported, it will be calculated by the system, when the order is sent in the following way: <u>For Monograph orders:</u> Current date + Z70-DELIVERY-DELAY according to the material delivery type. <u>For Standing orders:</u> Current date + Z68-MAX-NO-ARRIVAL-DAYS <u>For Serial orders:</u> Current date + Z70-DELIVERY-DELAY After this, the field is updated according to “Number of days until next claim” that is set in the “Claim Report and Letters for Monograph Orders” (b-acq-12) batch job. This batch job will not print a claim letter or update the Z68-EDA if Z68-AUTO-CLAIM is not set to “Y”. CONV: Relevant date for all order types. |
| Z68-ORIGINAL-EDA | M | 9(8) Format: YYYYMMDD | DESC: Original expected arrival date of the material. If it is not manually reported, it will be calculated by the system when the order is sent in the following way: <u>For Monograph orders:</u> Order date + Z70- DELIVERY-DELAY according to the material delivery type. <u>For Standing orders:</u> Z68-ORDER-DATE + Z68-MMAX-NO-ARRIVAL-DAYS <u>For Serial orders:</u> Z68-ORDER-DATE + Z70-DELIVERY-DELAY. Z68-ORIGINAL-EDA can be viewed only in the “View Order” window and is used for statistics. CONV: Relevant date for all order types. |
| Z68-LIBRARY-NOTE | O | X(200) | DESC: Free text. CONV: Blank or relevant note. |
| Z68-VENDOR | | | |

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| Z68-VENDOR-CODE | M | X(20) Upper case | DESC: Code of the vendor who supplies the material to the library. CONV: Relevant vendor code (Z70-VENDOR-CODE). |
| Z68-VENDOR-REFERENCE-NO | O | X(30) | DESC: Reference number used by vendor. CONV: Blank or text. |
| Z68-VENDOR-NOTE | O | X(200) | DESC: Note to the vendor; prints on order form. Free text. CONV: Blank or relevant note. |
| Z68-QUANTITY | | | |
| Z68-QUANTITY-TEXT | O | X(200) | DESC: Material requested, expressed in text (e.g. 3 copies paperback; v.1-2, one copy...) CONV: Blank or quantity text. |
| Z68-UNIT-TYPE | - | X(3) | DESC: Not used. CONV: Leave blank. |
| Z68-NO-UNITS | M | 9(5) | DESC: Number of units ordered. CONV: Relevant number. |
| Z68-UNIT-PRICE | O | X(10) | DESC: Price per unit. CONV: Relevant price, default price or blank. |
| Z68-TOTAL-PRICE | O | X(13) | DESC: Total amount. CONV: Relevant amount or blank. Can be computed using Z68-NO-UNITS and Z68-UNIT-PRICE. |
| Z68-E-PRICE-X | | | |
| Z68-E-CURRENCY | M | X(3) | DESC: Currency code of estimated price. CONV: Code should be a valid from the currency table (Z83-CURRENCY-NAME). |
| Z68-E-LISTED-PRICE | M | 9(12)V99 Leading zeroes | DESC: Estimated cost amount, in above currency (Z68-E-CURRENCY). CONV: Relevant amount. If Z68-METHOD-OF-ACQUISITION = 'P', then this field must not be zero. Can be computed using Z68-NO-UNITS x Z68-UNIT-PRICE. |
| Z68-E-TERM | | | |
| Z68-E-TERM-SIGN | M | X(1) | DESC: Indicates whether Z68-E-TERM-PERCENT is added or subtracted from the estimated cost when calculating Z68-E-PRICE. CONV: “-“ or “+”; use “+” as default. |

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| Z68-E-TERM-PERCENT | M | 9(3)V99 | DESC: Percentage of the added charge or discount. CONV: Enter zeroes if irrelevant or unknown. |
| Z68-E-PRICE | M | 9(12)V99 | DESC: Estimated order price, in the currency of Z68-E-CURRENCY, taking the “terms” into account. CONV: Relevant price or calculate using Z68-E-LISTED-PRICE, Z68-E-TERM-SIGN and Z68-E-TERM-PERCENT. |
| Z68-E-LOCAL-PRICE | M | 9(12)V99 | DESC: Estimated price of the material in local currency. CONV: Relevant local price; must not be zero if method of acquisition is "P" (purchase). Can be calculated using Z68-E-PRICE x currency table's Z82-RATIO. |
| Z68-E-NOTE | O | X(200) | DESC: Free text. CONV: Blank or relevant text. |
| Z68-TARGET | | | |
| Z68-APPROVER-ID | O | X(12) | DESC: This field is only relevant when the Z68-TARGET-ID is used. This field contains the Z303-ID of the user that approves the order for the Z68-TARGET-ID. CONV: Blank or relevant Z303-ID. |
| Z68-TARGET-ID | O | X(12) | DESC: ID of the user for whom the material is intended (see also Z68-TARGET-FLAG). CONV: Blank or relevant Z303-ID. |
| Z68-TARGET-TEXT | O | X(200) | DESC: Name of the user for whom the order is intended CONV: Blank or Z303-NAME. |

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| Z68-TARGET-FLAG | M | X(1) | <p>DESC: Indicates the action that should be performed when the Z68-TARGET-ID is used. Values are:</p> <p>N = No action</p> <p>D = Send directly to the user for whom the material is intended (Z68-TARGET-ID). The material will be sent directly from the vendor to the user.</p> <p>H= Create hold request for the user for whom the material is intended (Z68-TARGET-ID).</p> <p>M= Send a letter/e-mail to the user for whom the material is intended (Z68-TARGET-ID).</p> <p>Values are defined in the pc_tab_exp_field.lng table of the library's tab directory under the ACQ_TARGET_FLAG section.</p> <p>CONV: Relevant value. Must be "N" if Z68-TARGET-ID is blank.</p> |
| Z68-SUBSCRIPTION | | | |
| Z68-SUBSCRIPTION-DATE-FROM | M | 9(8) Format: YYYYMMDD | <p>DESC: Used only for "S" and "O" order types. Starting date of the subscription order.</p> <p>CONV: Put relevant date if the order type is "S" or "O". Put zeroes for order type "M".</p> |
| Z68-SUBSCRIPTION-DATE-TO | M | 9(8) Format: YYYYMMDD | <p>DESC: Used only for "S" and "O" order types. End date of the subscription order.</p> <p>CONV: Put relevant date if order type is "S" or "O". Put zeroes for order type "M" and for open orders of type "S" and "O".</p> |
| Z68-SUBSCRIPTION-RENEW-DATE | M | 9(8) Format: YYYYMMDD | <p>DESC: Used only for "S" and "O" order types. This is the date on which the subscription should be renewed.</p> <p>CONV: Relevant date or zeroes.</p> |
| Z68-SUBSCRIPTION-BUDGET-PERIOD | M | 9(1) | <p>DESC: Used for "S" and "O" order types. Determines the encumbrance period and therefore it also designates when the encumbrance should be renewed.</p> <p>Each digit designates the number of years (from 1 to 9).</p> <p>CONV: Relevant value (from 1 to 9).</p> |

| Z68-STANDING | | | |
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| Z68-MAX-NO-ARRIVAL-DAYS | M | 9(4) | <p>DESC: Used for order type "O". This is the maximum number of days that may elapse since you received the last volume. If you have not yet received any volumes, then this is the maximum number of days that may elapse since the order was sent to the vendor. Used for claiming standing orders.</p> <p>CONV: If Z68-ORDER-TYPE is "O", enter a default value here; else enter zeroes.</p> |
| Z68-AUTO-CLAIM | O | X(1) | <p>DESC: Claiming will be automatically generated by the "Claim Report and Letters for Monograph Orders" (p_acq_12) batch procedure if set to 'Y'. Values are 'Y' and 'N'</p> <p>CONV: Relevant value.</p> |
| Z68-ISBN | O | X(20) | <p>DESC: ISBN or ISSN. In MARC 21 libraries, it is automatically copied from the 020 field (ISBN) or the 022 field (ISSN) of the bibliographic record. Validity check of ISBN/ISSN is performed if the CHECK-ORDER-ISBN-ISSN flag in data_tab/tab100 is set to 'Y'.</p> <p>CONV: Blank or relevant ISBN/ISSN.</p> |
| Z68-VENDOR-CONTACT | O | X(200) | <p>DESC: Name of the person to contact at the vendor. In the Acquisitions/Serials module it is automatically updated with the contents of the first contact associated with the selected vendor (Z70-CONTACT-1). The user is free to change the contents of the field.</p> <p>CONV: Relevant value or blank.</p> |

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| Z68-ORDERING-UNIT | O/ M | X(5) | <p>DESC: Acquisitions ordering unit. The order unit mechanism can be used to indicate the authorization group to which a user belongs. Users who belong to the same order unit may update each other's orders. The ordering units to which the acquisition librarians belong are assigned through the Privileges function. Note that if the USE-ORDER-UNIT flag in the tab100 table of the administrative library is set to 'N', then the Z68-SUB-LIBRARY is used as the main order unit. Note that ordering units are defined in the tab_sub_library.lng table (sublibrary type 5).</p> <p>CONV: Relevant order unit or blank. If the USE-ORDER-UNIT flag in the tab100 table of the administrative library is set to 'N', then this field should be left blank. If the USE-ORDER-UNIT flag in the tab100 table of the administrative library is set to 'Y', enter relevant order unit. For global authorizations, use the global library code (e.g. USM50).</p> |
| Z68-ERM-TYPE | O | X(3) | <p>DESC: Z68-ERM-TYPE (or Material Format) is needed to distinguish between acquisitions for the print or electronic manifestation of the resource. The values are:</p> <p>PRN - Print ELC – Electronic</p> <p>In future these values will mean whether the record originates from ALEPH or from Verde.</p> <p>CONV: Relevant value.</p> |
| Z68-ERM-ID | O | X(30) | <p>DESC: The field is in use in Verde, but will interact with ALEPH acquisitions. The field defines the Acquisition's ID in the Verde system. This ID will then be used by ALEPH for generating an order.</p> <p>CONV: Relevant value.</p> |