

Clearing Open Monograph Orders

Most discretionary funds begin each fiscal year with money already encumbered. These encumbrances are a result of either

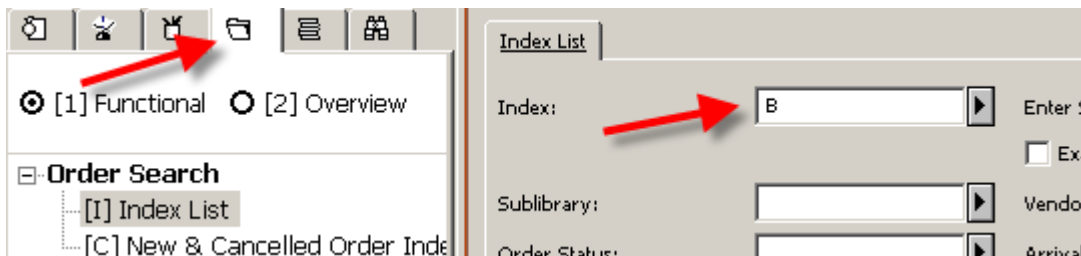
- 1) recent orders placed too late in the fiscal year for the material to have arrived and been paid for, or
- 2) older orders placed for out-of-print, foreign, or otherwise hard-to-locate items.

Selectors can instruct Acquisitions to cancel open orders to free up funds. Please be advised that:

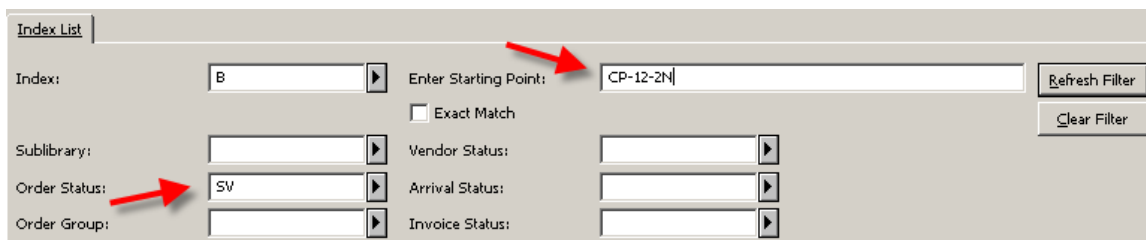
- Acquisitions needs to receive authorization from the selector, by e-mail or in print, to cancel orders.
- Acquisitions' procedures will be to 1) check the OPAC and other sources to verify that the item in fact was never received; 2) contact the vendor to be sure the item has not already been sent; 3) cancel the order with the vendor; 4) cancel the order in Aleph (i.e. change the status from SV to LC); and 5) remove temporary bibliographic records and "on order" notices from the OPAC.
- Acquisitions will work through cancellation requests as time permits – processing current orders and current receipts are priority workflows.
- If selectors make decisions and send lists to Acquisitions in the summer, Acquisitions' work could likely be completed by December, freeing up funds to allow selectors time to place new orders before the end of March.

Creating a List of Open Orders

In Aleph, click on the File Folder icon.
Search by Budget (in the drop-down list in the Index field, choose B Budget).



In Enter Starting Point, type in the fund code. Do not include the year designation.
In the pull-down list for Order Status, select SV Sent to Vendor.
Click Refresh Filter.



The list will appear in the central window. You can change the column headings by right-clicking on the header bar and making selections in the check-list that will open. Acquisitions will need the fund code, order number, vendor and title at a minimum. Please be sure to include these fields (they are part of the default but you may have changed your settings).

Index	Order No.	Title	Vendor	Status	Status Date
CP-12-2N-2003	CP0309200036	Prepositions in their syntactic, semantic, and pragmatic context / edited by Susanne Feigenbaum, Den	CP-*8725	SV	04-02-03
CP-12-2N-2003	CPA205900061	Research in the language classroom : 1989 / editors Christopher Brumfit, Rosamond Mitchell.	CP-*4970	SV	07-16-02
CP-12-2N-2003	CPA223500015	The mark on the wall and other short fiction / Virginia Woolf ; edited with an introduction and note	CP-*4222	SV	11-22-02

Scroll to the end of the list and click on the last item for the fund code. Press F11 on your keyboard.

A Print Preview screen will open. Right click on the Preview window and select Export to Microsoft Excel. Save the spreadsheet to review, edit and send to Acquisitions.

The **Status Date** is the date the order was placed.

- The best candidates for cancellation are those orders one year old or older. Orders that have been open that long are highly unlikely to be filled, anyway.
- Please note that an order placed recently (in other words, late last fiscal year) is not a good candidate for cancellation since the vendor may already have processed the order and prepared the material for shipping. You may ask that such an order be cancelled if you no longer want the item, but cancellation may not be possible.

Notifying Acquisitions

The list will include orders on funds that sort before and after yours. Simply delete those rows from your spreadsheet. The spreadsheet should include only a discretionary fund that you are responsible for.

Add a notes column to the spreadsheet and enter the word “cancel” next to those orders that you no longer want. Leave a blank next to those orders you want left open.

Print the spreadsheet, sign it, date it, and send to Acquisitions for processing. Alternatively, you could save the file and send an electronic copy with an e-mail stating your intent to cancel the selected titles to members of the Acquisitions Order Team at tsd-acqot@umd.edu.

If you have nothing to cancel, don't send anything to Acquisitions. Orders will remain open until filled or until cancelled by the vendor, the publisher or the selector.