How to Bulk Arrive Orders in Acquisitions

Bulk Arrival

The Bulk Arrival is a process that supports registering arrival in a bulk mode for Monograph and Standing Orders. This includes the option to register an invoice for the arrived items.

The Bulk Arrival List

The Bulk Arrival list is accessed via the Bulk Arrival node in the Order Search tab of the Acquisitions module.

It displays Monograph and Standing Orders which have been already sent to a vendor and are not marked as "Completely Arrived".

The user can use the Bulk arrival List filters in order to retrieve the orders record for arrivals that should be registered. Available filters are Additional Order Number 2, Vendor, Invoice Number, Sublibrary, and From-To Order Dates.

For example, the "Order Additional Number 2" filter can be used to retrieve a group of orders with a common order number which were sent to the vendor as a bulk order.

The Invoice Number filter works in conjunction with the Vendor filter. Activating both Vendor and Invoice Number filters provides the option to easily retrieve all invoice related orders and register arrival in bulk mode.

Note that when activating the Vendor filter (without Invoice Number filter), the system applies to the vendor assigned to the order record. When activating both Vendor filter and Invoice Number filter, the system applies to the vendor assigned to the general invoice and list relevant attached orders.
The lower pane of the Bulk Arrival List contains read-only order details. This includes information regarding the patron initiated the request (patron’s global, local, and address information).

Available Actions

The following buttons are available on the right hand side of the screen:

- Print order
- Select
- Arrive
- Arrive All

Print Order Information slip

This action is valid only for a single line selection. It prints the order information for the highlighted entry.

Select Action

This action is valid only for a single line selection. The action transfers the user to the Order Tab and displays the order for the highlighted entry. The user can then perform the different functions related to a single order.

Arrive and Arrive All Actions

Clicking the Arrive and Arrive All buttons enable activating the bulk arrival process.

When clicking the Arrive button, the user has the option to select multi-lines. (The SHIFT and CTRL keys can be used for selecting more than one entry).

When clicking the Arrive All button, the system activates the bulk ordering process for all displayed orders.

Once the Arrive or Arrive All button is clicked, the Multi Arrival Form is opened.

Multi Arrival Form

The Multi Arrival enables registering arrival for all orders selected in the previous Bulk Arrival List. It also offers an option to create general invoice and line items for arrived items.
The form fields:

- Shipment date: The date items were shipped (can be left zeros)
- Arrival date: The date on which items arrived (Default current date).
- Note: Arrival note that is assigned to all arrived transactions (can be left empty).
- Print Arrival Slips checkbox: Indicates whether or nor arrival slips should be printed (template file name: acq-arrival-slip.xsl).
- Create Invoice checkbox: Indicate whether or not General Invoice and Line items should be created for the orders that are being registered as "arrived". Invoice line items are created only for orders that currently have no invoice line items.
- Payment Status: If "Create Invoice" is checked, the Payment Status field is enabled to allow the user to select the general invoice payment status.

When the form is submitted, the relevant staff user's access rights are checked. This includes user privileges for registering material arrival, printing arrival slip, creating invoice and line items, updating invoice payment status, etc.

In case when the staff user is not authorized for one or more of those actions, the user's access right block message is displayed and the arrival and invoice actions are blocked (no Aleph data is updated).

If the action is submitted by an authorized user, the following actions occur:

- Arrival record is created for each order in the group of orders, and other Aleph corresponding records are created or updated.
- The Multi-Arrival Form is closed and the user is prompted with the Bulk Arrival Report window which reports the result of the bulk arrival action.
- If the "Print Arrival Slips" checkbox is selected, the arrival slips are produced when the Bulk Arrival Report window is closed.

Following are the acquisitions components that are affected/might be affected by the bulk arrival action:

- Arrivals
- Orders
- Items
- General invoice
- Line items
- Budget Transaction

**Arrival Records**

Arrival record (Z78) is created for each order in the group of orders. In the Arrival record, the arrival status of all related Monograph orders is marked as "Completely Arrived" (Standing Orders are not marked as "Completely Arrived").

The "Number of Units Arrived" of the Arrival record is set as the order record's Number of Units.
The Arrival Shipment Date, Arrival Date and Arrival Note fields are set as defined in the Multi Arrival Form.

General details regarding the newly created arrival records are included in the Bulk Arrival Results window.

**Orders Records**

The related order records (Z68) are updated as if manual arrival has been registered for the orders. This includes the following:

The Arrival Status of Monograph orders is set as "Complete". The Arrival Status of Standing Order is not touched.

If "Create Invoice" is called and invoice line item has been successfully created, then the Monograph Order's Invoice Status is set to "Complete". The Invoice Status of Standing Order is not touched.

The Order Status might be affected depending on the actions made on the order. For example, monograph orders status is updated to "Closed" if both order Invoice Status and Arrival Status are "Complete" and General Invoice Payment status is "Paid".

**Items Records**

The Items (Z30) records which are related to the arrived orders might be affected as if manual arrival has been registered. For example, the Item Process Status value can be updated according to the library policy as defined in ./tab/xxx50/tab/tab42.lng.

**General Invoice, Line Items and Budget Transactions**

If the "Create Invoice" field of the Multi Arrival Form is checked, the system attempts to create a single General Invoice record (Z77) for all related orders.

The general invoice includes line items records (Z75) for each arrived order. If the orders were already assigned to a budget transaction (Z601), then a new budget transaction of type Invoice is created.

**General Invoice Creation**

A new general invoice record (Z77) is created for all detected orders. Most of the general invoice data is populated in the same way as when an invoice is created for a single order via Invoice under the Order tab in the Acquisitions module. The following general invoice fields are handled differently:

- The General Invoice Number is assigned using the ADM library counter set in g/2: last-invoice-no
- The Invoice Vendor and the Invoice Currency are set as in the related orders. If the group of orders is assigned to various vendors or currencies, the vendor/currency code is assigned according to the "first" order.
- The Invoice Payment status is set as defined in the Multi-Arrival Form.

General details regarding the success or failure of general invoice creation are included in the Bulk Arrival Report window.
**Invoice Line Items Creation**

A new invoice line item record (Z75) is created for each order that currently has no invoice line item.

The line item data is populated similar to the manner in which a line item is created for a single order via GUI-ACQ-Order tab-Invoice.

If an order already has an invoice line item record, then line item is not created.

General details regarding success or failure of line items creation are included in the Bulk Arrival Report window.

**Budget Transaction Creation**

A budget transaction record of type Invoice (Z601) is created for each order that has a budget transaction of Encumbrance type. The system performs checks the same as when the budget is manually assigned to cover an invoice line item (budget code, monetary coverage, dates, object codes, etc.). If the check fails, the line item is created but without creating a budget transaction of type Invoice.

If the order has no related budget transaction, a new budget transaction is not created.

General details regarding success or failure of budget transaction creation is included in the Bulk Arrival Report window.

**The Bulk Arrival Report Window**

After the Multi Arrival Form is submitted and the above updates of Aleph data are performed, the Bulk Arrival Result window is displayed.

This window includes brief information of successful and failed actions. The information is read-only and can be printed using F11 key. Successful actions are reported in green text. Failures actions are reported in red text.

The Information will include details regarding:

- Total number of retrieved orders
- Total number of arrival records (successful and failed actions)
- General Invoice Number and line items (successful and failed actions)
- Failed budget transactions

When the OK button is clicked, the Bulk Arrival Result window is closed. If the Print Arrival Slips checkbox is selected, the arrival slips are produced.

The Bulk arrival action is completed.