AMAZON ORDERS WORKFLOW IN ALEPH

Log on to Aleph. You must have the materials and invoice (s) in hand to start adding them to Aleph.

1. Go to the Acquisitions module.

2. Click on the binoculars icon, the “Find” option should be highlighted. Search using any information you have available, and hit “enter” or click on “OK”.

If your search does not find any matching bibliographic record for your item, give the material to your Campus’ copy cataloger to search for the appropriate one in OCLC. After the bibliographic record is downloaded to Aleph, you can proceed to add the order to it.

If a bibliographic record exists in Aleph, it will open a top window with holding records, and a bottom one with a detailed bibliographic record. Make sure it is the one you need. If the bibliographic record has only one ISBN, it will populate in your order record; but if it has more than one, you need to choose the right one from the drop down menu.
3. Click on “Orders”.

A blank order will show up. Click on “Add”.

4. For now, choose “Monograph” by clicking on “OK”:

A new semi-populated order record show up with three tabs that you will need to open and fill out certain fields in each one.
In the “2. General” tab fields marked with an * are mandatory and automatically populated. The very first time that you add an order to Aleph you need to input three mandatory fields:

- Sublibrary
- Order Group
- Acquisition Method

“Order Number” is a unique system-created number that identifies each individual order within Aleph.

5. Fill in “Order Group” with either CIRC or REF.

This information will be turned into a template (default) for your following orders, so make sure that you add Circulation and Reference orders in separate batch.
6. Click on “3. Vendor” tab to search for it and select the proper one:

7. Open “4. Quantity and Price” tab and click on “Unit Price” box and fill it out. Note that the “Create Item Record” box has a check mark, indicating that an item record will be created in Cataloging; which is the default for MDC. See example at the end of document, p. 18.

8. Fill out “Item Collection” box by choosing the proper option from the drop-down menu.
9. If you are planning to order several titles at the moment, click on “Save Defaults”. The system will save the following fields for your future orders: Order No. 2 & 3, Order Group, Sublibrary, Acquisition Method, Vendor, and Item Collection.

10. Click on “Add”.

Your new order should look like this indicating the Status as “New”; Inventory Status as “None” because you still do not have an invoice associated with the order; Arrival Status as “None” as well because you still have not received your item, and the Budget in blank:
11. The next step is to add a budget to the order. On the left side, search for and click on “Encumber” to add a budget to your order, and then click on the little box with dots from “Budget Code to Add”:

12. Search for your budget and click on “Select”:
13. Aleph will take you back to your order. Click on “Add Budget”:

Your order is encumbered now: