



## SIERRA ACQUISITIONS

# Importing Order Data into Item Records

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Some libraries use the option to import the payment and other order data into an item record. That way the library can retain order information after the order record itself has been deleted. Keep in mind the recommendation is to retain 2-3 years plus current fiscal year of order records for statistical reports.

Contact Support if you are interested in enabling this option. It requires the presence of a Paid field in the order record. You cannot transfer order data for records with an on-order status.

Support will need you to specify a new variable length field into which the order data is imported.

It is important to note that there is no option to do this via Rapid or Global Update. The listed steps are done manually which suggests making this part of the item creation workflow and not trying to do as part of year end.

This sequence may also require changes in operation regarding deleting item records, since some items will now be the repository of order data. You can request that item records containing an order information field be protected from deletion. When this has been enabled, the payment field must be deleted before the item.

Here are the standard steps.

1. Retrieve the bibliographic record to which the item and order are linked.
2. Choose from the Summary tab the Item display and the specific item to use.
3. Under Edit (top left Sierra toolbar) select the Import Order Information.
4. From the selection window, select an order from the list, and then choose Use Selected Order. Alternatively, if you want to import order data from an order record attached to another bibliographic record, choose Browse and retrieve that record. Select an order record from that list, and then choose Use Selected Order.
5. Sierra displays the Payments tab of the order record. Select a Paid field from the list by choosing its line number, and then click on the Use button. If multiple funds were used for the selected order record, you are prompted to select one of those funds to include in the imported order information. Select one of the listed funds and then click on OK.
6. Sierra imports the order record's data into the item record.

# Training

The following table indicates the MARC subfield into which data is mapped in the order information field.

Order data	MARC subfield
Order Record Number	a
Vendor Invoice number	b
Invoice Date	c
Voucher Number	d
Date Paid	e
Amount Paid – Local Currency	f
Amount Paid – Foreign Currency	g
RDATE	h
Vendor	k
Fund	l
Order Type	m
Form	n
Order Code 1	p
Order Code 2	q
Order Code 3	r
Order Code 4	s
User-Supplied Paid Note	u
System-Generated Paid Note	v

The system does not create empty subfields in the order information field if order data for that subfield does not exist. The contents of subfield a, the order record, can be indexed if requested. The order record number in the item field does not include a check digit. Also, the system calculates the currency amounts that appear in subfields 'f' and 'g' to show the price per copy, not the total amount paid.

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