# Acquisitions

Last Updated May 2016

# Fund Records

What are fund records?

- Before you begin using Acquisitions, you will need to develop your list of funds records.
- Each library budget category requires a fund account record. You can track expenditures and encumbrances by fund.
- Each fund record contains information about fund amounts and fund activity during a specified fiscal period.
- Fund records belong to the library that creates them. No other library in SAILS will be able to view your fund records.
- The software maintains a master fund record and then attaches a fiscal cycle record to this master record.
- Fund records can be used for tracking the purchase of books, serials, standing orders, library supplies, etc.
- You must create all fund records before you create orders for those funds.
- You cannot remove funds that have orders or encumbrances against them.

How are fund records set up?

Before you begin, examine your acquisitions budget for the upcoming year. You will need to answer the following questions:

How do we want to track our expenditures? Your fund records can be as simple as tracking expenditures by print and non-print titles. You can track expenditures by adult, YA, and juvenile materials or by format. You want to separate funds by their source so you can track expenditures. Examples of this would be materials purchased with a memorial fund, local funds, or grant funds. A simple way of laying out your fund records could be to set up a table. (See below.)

| SOURCE | AGE | FORMAT |
|---|---|---|
| LOCAL | ADULT | BOOK |
| TRUST | JUVENILE | VIDEO |
| GRANT | YOUNG ADULT | REFERENCE |
| OTHER | | PRINT |

Of course, you could break this down even further by specifying the type of book (such as fiction, mystery, nonfiction, etc.) and creating a separate fund for each genre.

Once you have set up your chart of fund records you are ready to complete a SAILS work form for each fund record. Every one of your accounts will begin with a 2 or 3 letter code assigned to your specific library. Each account code must be unique. Code descriptions should be no more than 16 characters. Complete one form (Appendix A) for each fund record.

A sample form appears below. Each fund must have, as a minimum, a Level 1 assigned to it. Levels 2-4 are optional. Levels are used for reporting purposes only.

If you are filling this out for a library with branches, you can decide to separate funds by branch location. If this is the case, please enter the branch name here.

YOUR LIBRARY:_____

ACQUISITIONS – FUNDS

FUND ID:

**Begin with your library's 2 or 3 letter code. The ID must be unique and should be no more than 16 characters**.

FUND NAME:

ACOUNT #:

Your internal account number

A clear description of the account

LEVEL 1: (pick one)

- ☐ENDOWMENT
- ☐FEDERAL
- ☐FRIENDS
- ☐GIFT
- ☐GRANT
- ☐LOCAL
- ☐OTHER
- ☐STATE
- ☐TRUST

Level 1 is required. All other levels are optional.

LEVEL 2: (pick one)

- ☐Adult
- ☐Juv
- ☐YA
- ☐Unknown

LEVEL 3: (pick one)

| | |
|---|---|
| ☐AUDIOTAPE | MUSICAL AUDIOTAPE |
| ☐BOOK | BOOK |
| ☐BOOKCD | BOOK ON CD |
| ☐BOOK&CD | BOOK AND CD |
| ☐BOOKKIT | BOOK AND TAPE KIT |
| ☐BOOKTAPE | BOOK ON TAPE |
| ☐CD | MUSICAL COMPACT DISC |
| ☐CDROM | CDROM SOFTWARE |
| ☐DVD | DVD |
| ☐ELECTRONIC | ELECTRONIC DATABASE |
| ☐EQUIP | EQUIPMENT |
| ☐KIT | MULTIMEDIA KIT |
| ☐LEASE | LEASE |
| ☐LT | LARGE TYPE |
| ☐OTHER | OTHER |
| ☐PBK | PAPERBACK |
| ☐PERIODICAL | PERIODICALS |
| ☐PRINT | PRINT |
| ☐NONPRINT | NONPRINT |
| ☐REF | REFERENCE |

| | |
|---|---|
| ☐UNKNOWN | No description |
| ☐VIDEO | VIDEO |

LEVEL 4 (pick one)

| | |
|---|---|
| ☐BRAILLE | BRAILLE |
| ☐ENGLISH | ENGLISH LANGUAGE |
| ☐PORTUGUESE | PORTUGUESE LANGUAGE |
| ☐SPANISH | SPANISH LANGUAGE |

# Vendor Records

What are vendor records used for?

- A vendor record identifies the source of materials being acquired. Every vendor from which your library obtains material should have a corresponding vendor record. When an order is created, it is linked to a vendor record. Before you begin using Acquisitions, you will need to develop your list of vendor records.
- Each order requires a vendor record. You can track expenditures and encumbrances by vendor.
- Each vendor record contains information about vendor amounts and vendor activity during a specified fiscal period.
- Vendor records belong to the library that creates them. No other library in SAILS will be able to view your vendor records.
- The software maintains a master vendor record and then attaches a fiscal cycle record to this master record.
- Vendor records can be used for tracking the purchase of books, serials, standing orders, library supplies, etc.
- You must create all vendor records before you create orders to be attached to them.
- You cannot remove vendors that have orders or encumbrances against them.

How are vendor records set up?

Before you begin, you will need to get information on all the vendors from which your library orders materials. You will need your account number, the vendor's address, SAN, etc. If you are planning on placing electronic orders with this vendor, you will need to notify SAILS. SAILS will be setting up a standard code for each vendor. Your vendor code will begin with your library's 2 or 3 letter code followed by the vendor code. For example, Carver's Baker and Taylor vendor record would have a vendor code of CARBT

Once you have identified all of your vendors, you will also need to know what percent encumbrance will be allowed for the vendor, what the claim and cancel periods will be, and whether the vendor offers a monetary or quantity discount. Entering discounts at this point is optional.

## Order Records

An order record represents the item or items in the process of being acquired. Orders associate funds and vendors with a description of the item(s) being ordered. An order record often represents a purchase order with one or more line items (called orderlines in Unicorn) that has been or will be sent to a vendor. An order record may also represent a gift (where the vendor is the donor). Order records can be used to purchase library supplies and items for external agencies as well as to purchase materials for the collection. An order consists of several parts: the order record, one or more line item (orderline) records, and one or more special records (called segments) that contain funding, distribution, claiming, and canceling information. Unicorn keeps track of the transactions occurring within each of these record types. In a multilibrary system, orders belong to the library that created them. Using the information in the vendor, order, and line item records, workstation operators generate purchase orders through the Reports wizard.

**NOTE** You must create the designated funds and vendors before creating the order.

Each order is identified in Unicorn by an order ID. A purchase order number can be entered for the order ID, or Unicorn can generate an order ID automatically in a library-defined pattern. There are three order types: Basic, Dated, and Recurring. **This manual only discusses Basic orders.**

## Holding Codes

Every library will receive 1 Holding Code for acquisitions. Libraries with branches will receive 1 Holding Code for each branch. The Holding code will begin with ACQ followed by your library's 2 or 3 letter code. For example, Carver Public Library's Acquisitions Holding Code will be ACQCAR. The Holding Code will have the following values:

Your library
Home Location of On Order
Item Type of On Order
Item Category 1 of On Order

## Item Types

Since we are adding a copy when creating the order record, the Item type overrides the Holding code. Therefore, you want to make sure that you have the correct Item type when creating your order record.

The holdable Item Type is ONORDER. The non-holdable Item Type is ONORDERN.

## Session Settings


The **Session Settings wizard** guides you through the process of setting properties for a number of the acquisitions wizards. *Maintenance Library and Display library should be the same. Fiscal cycle will always be 4 digits.*

1. All other settings are optional.
2. Click **OK**

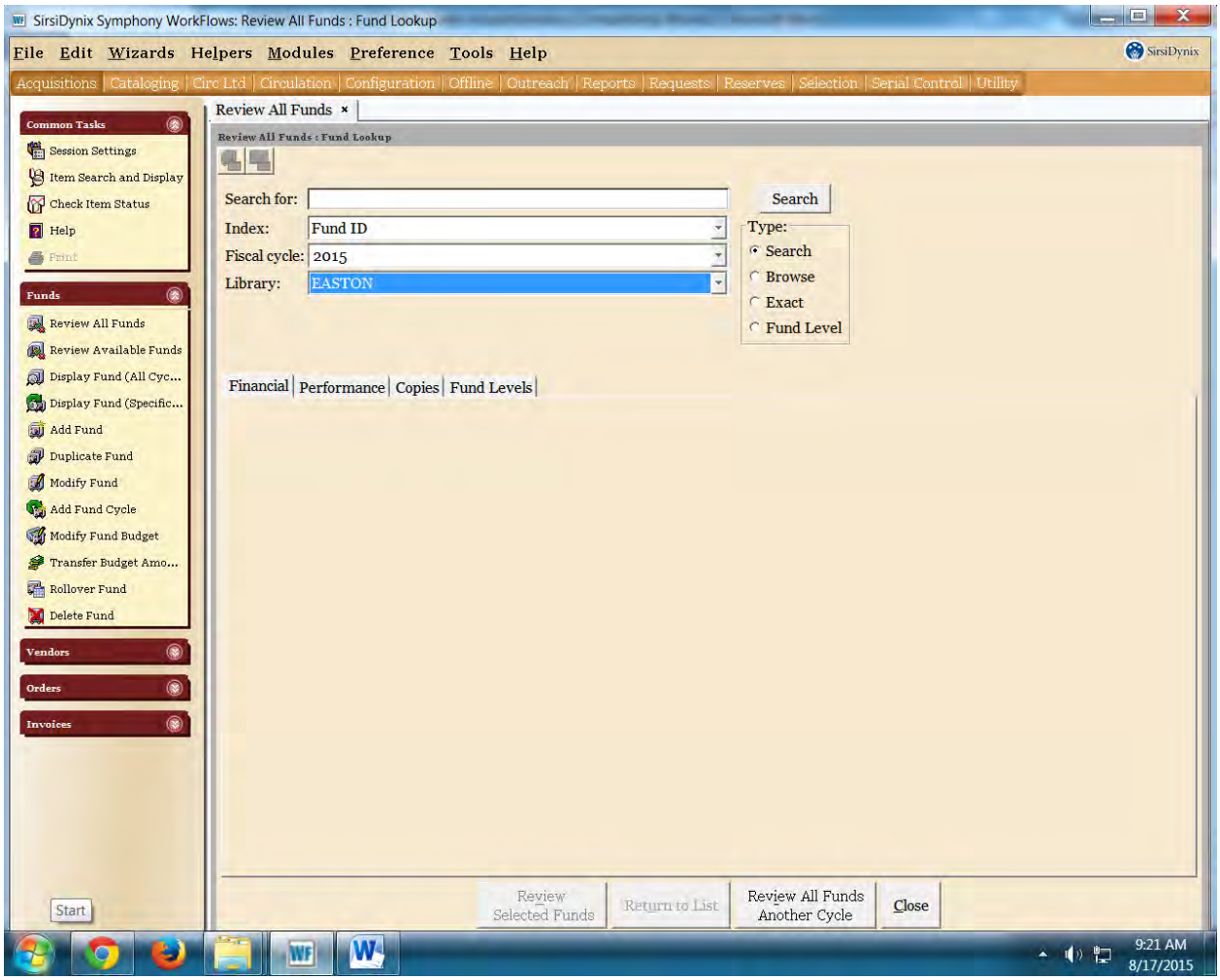
# Review All Funds Wizard


Use this wizard to review the item, budget, and performance information for all funds (or selected funds) within a specific fiscal cycle.

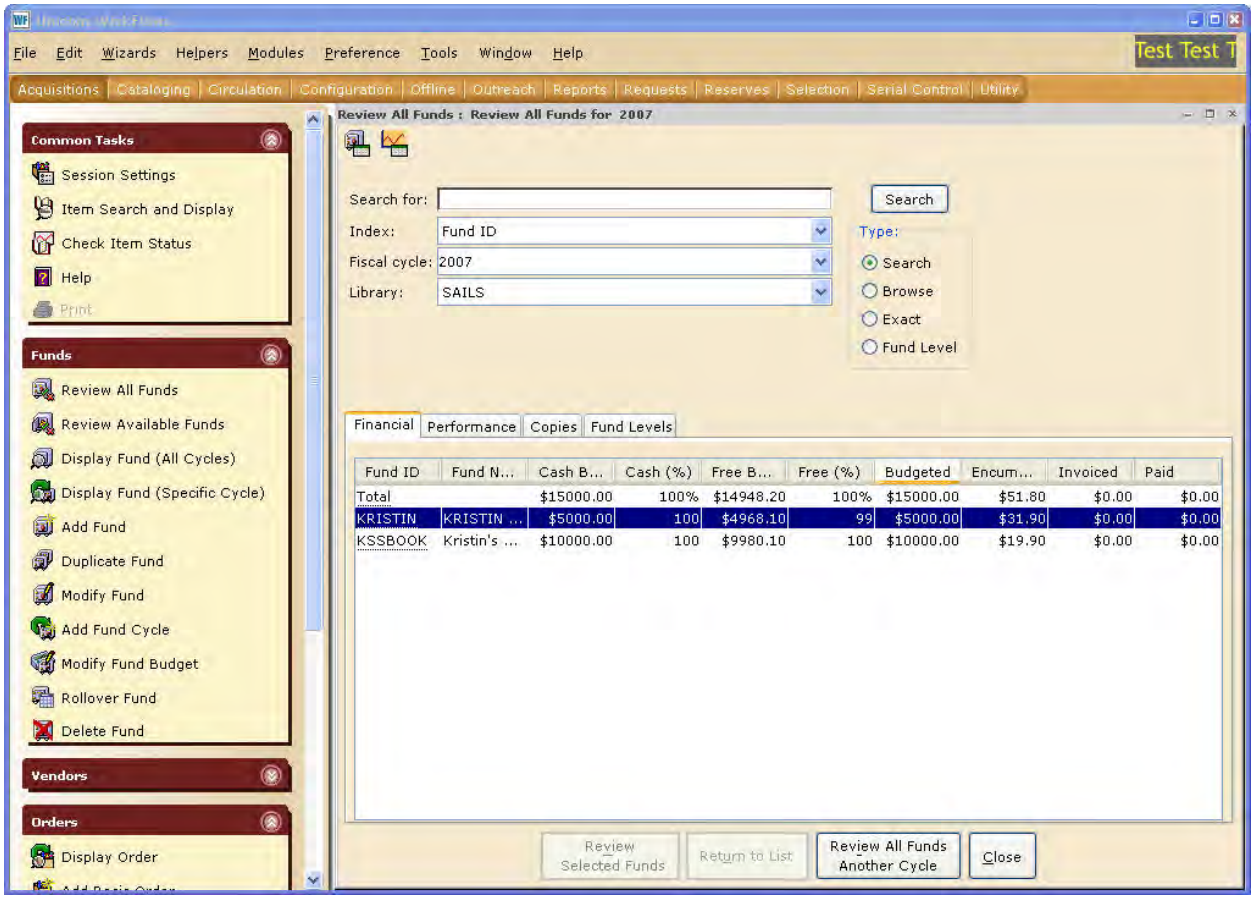
To review all funds:

1. Click on the **Review All Funds wizard**

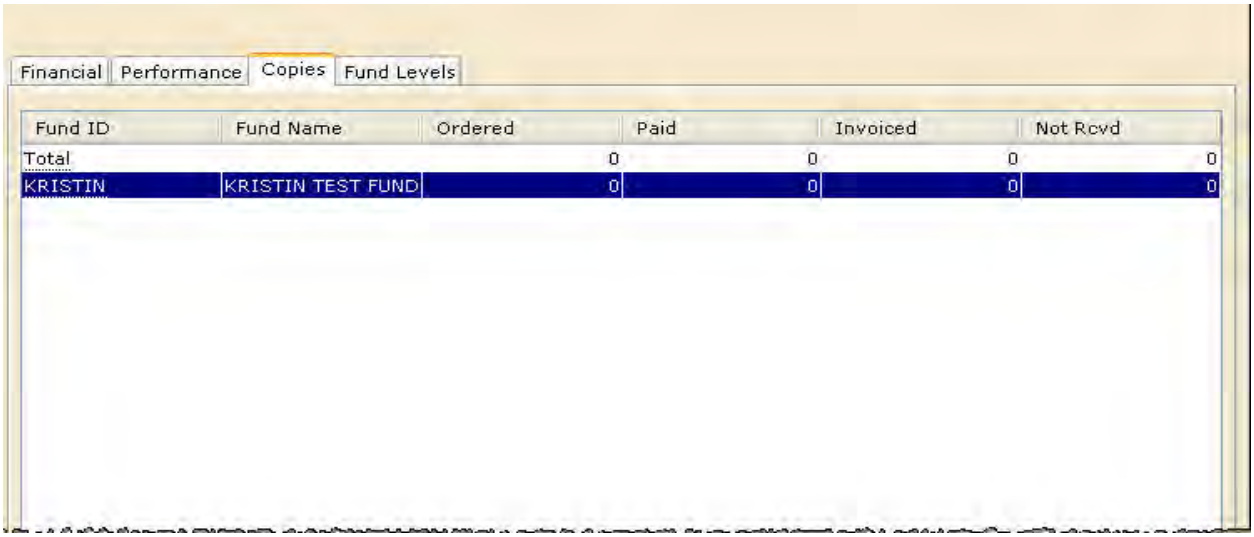
   The fund lookup screen displays.



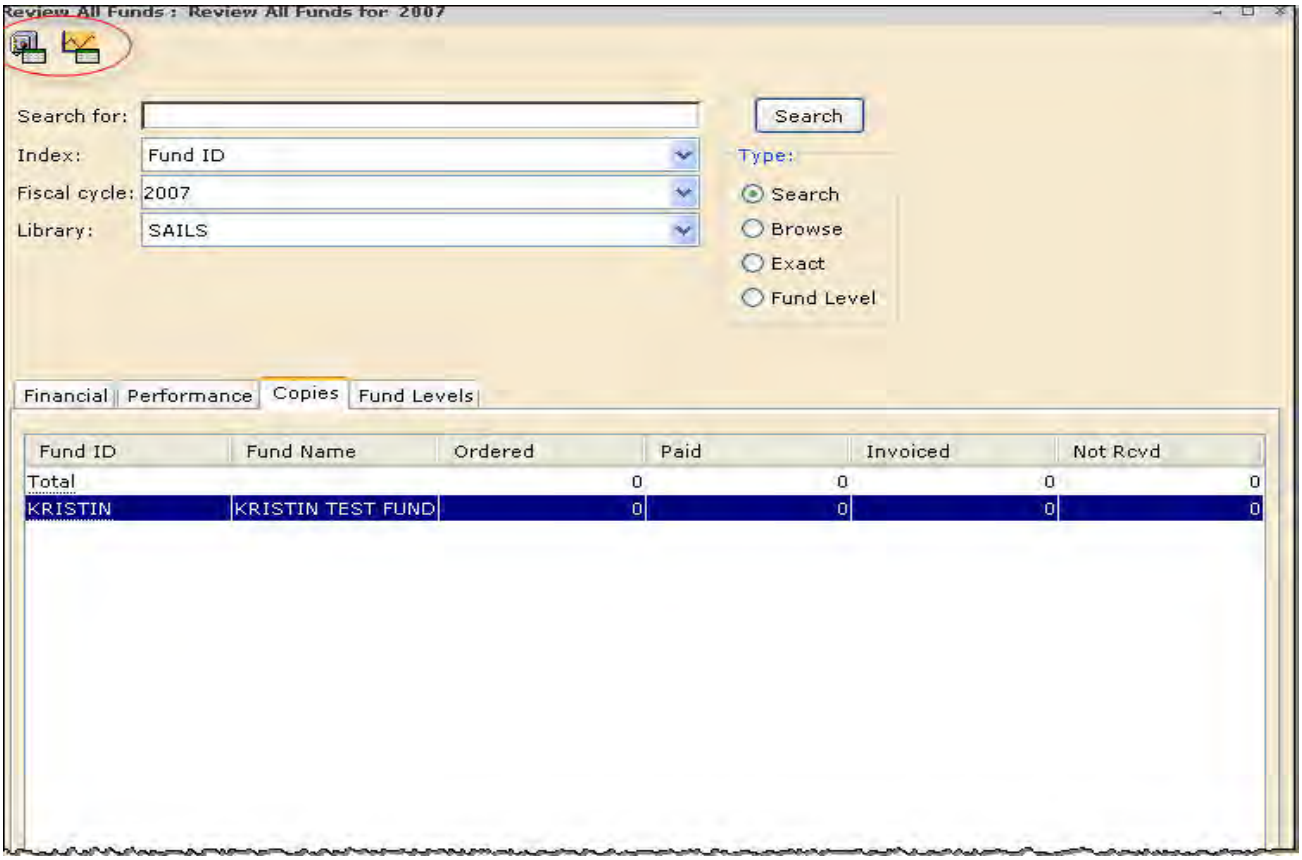
2. Enter a Fund Id or leave the search field blank and then click **Search** to review all of your funds.




3. Click on one of the tabs, such as Copies Tab, to view additional information about this fund.



4. To output fund information to data files, use the *Save Financial and Copies Data to a File or the Save Performance Data to a File helpers.*




## Review Available Funds Wizard


Use the **Review Available Funds wizard** to view funds that have a free balance greater than $0.00.

To view available funds:

1. Click on the **Review Available Funds** wizard. The following screen appears:


Review Available Funds : 2007 Funds Available
Search for:
Search
Index:
Fund Name
Type:
Fiscal cycle:
2007
Search
Library:
SAILS
Browse
Exact
Search Fund Name ; SAILS; 2007
Fund ID
Fund Name
Free Balance
Free (%)
KRISTIN
KRISTIN TEST FUND
$5000.00
100

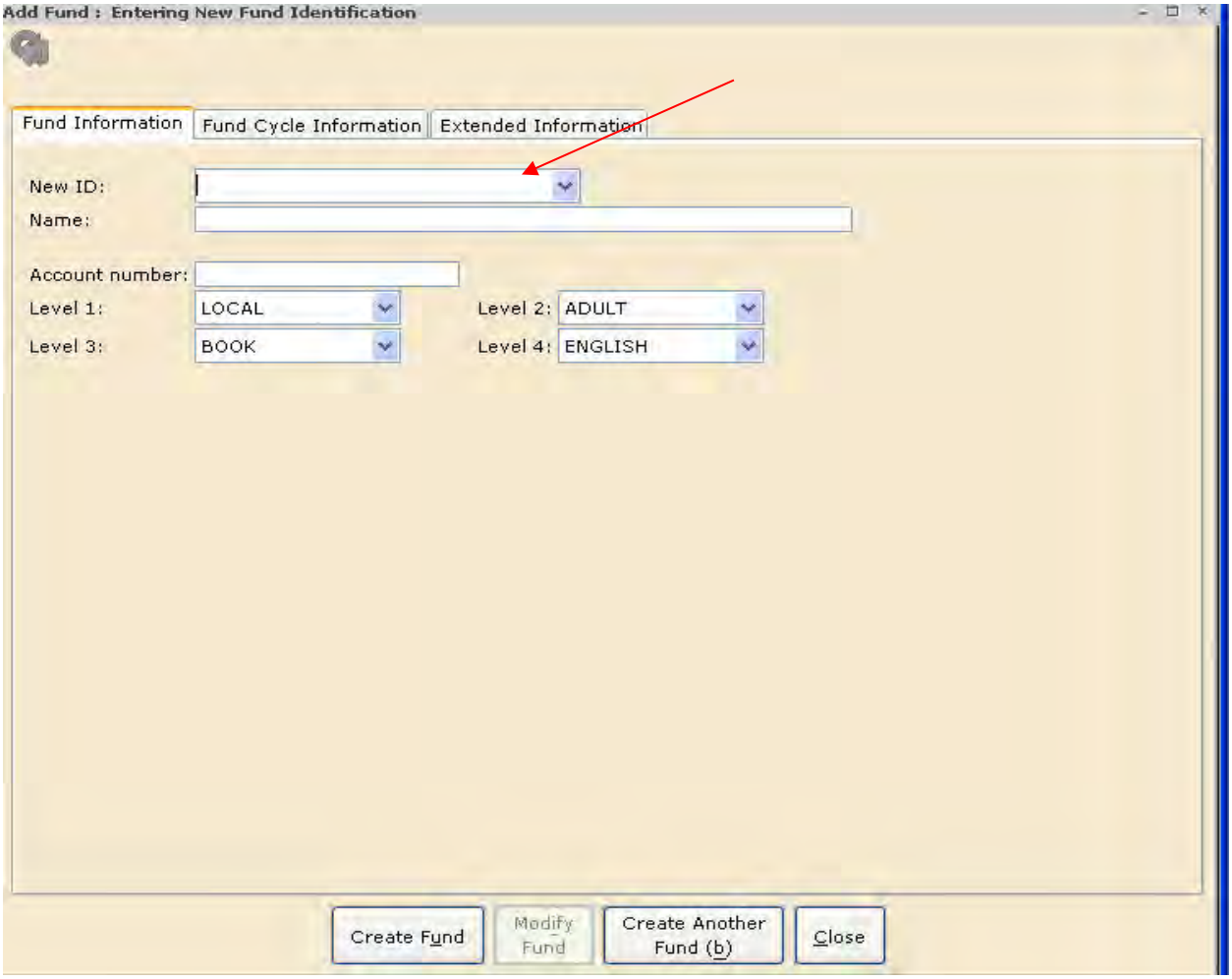
# Add Fund Wizard: Creating a Fund


Use the **Add Fund wizard** to create a new fund.

To create a fund:

1. Click on the **Add Fund wizard** in the Funds group of wizards.

   The Entering New Fund Identification window will open.




2. Type in a ***New ID*** for this fund.

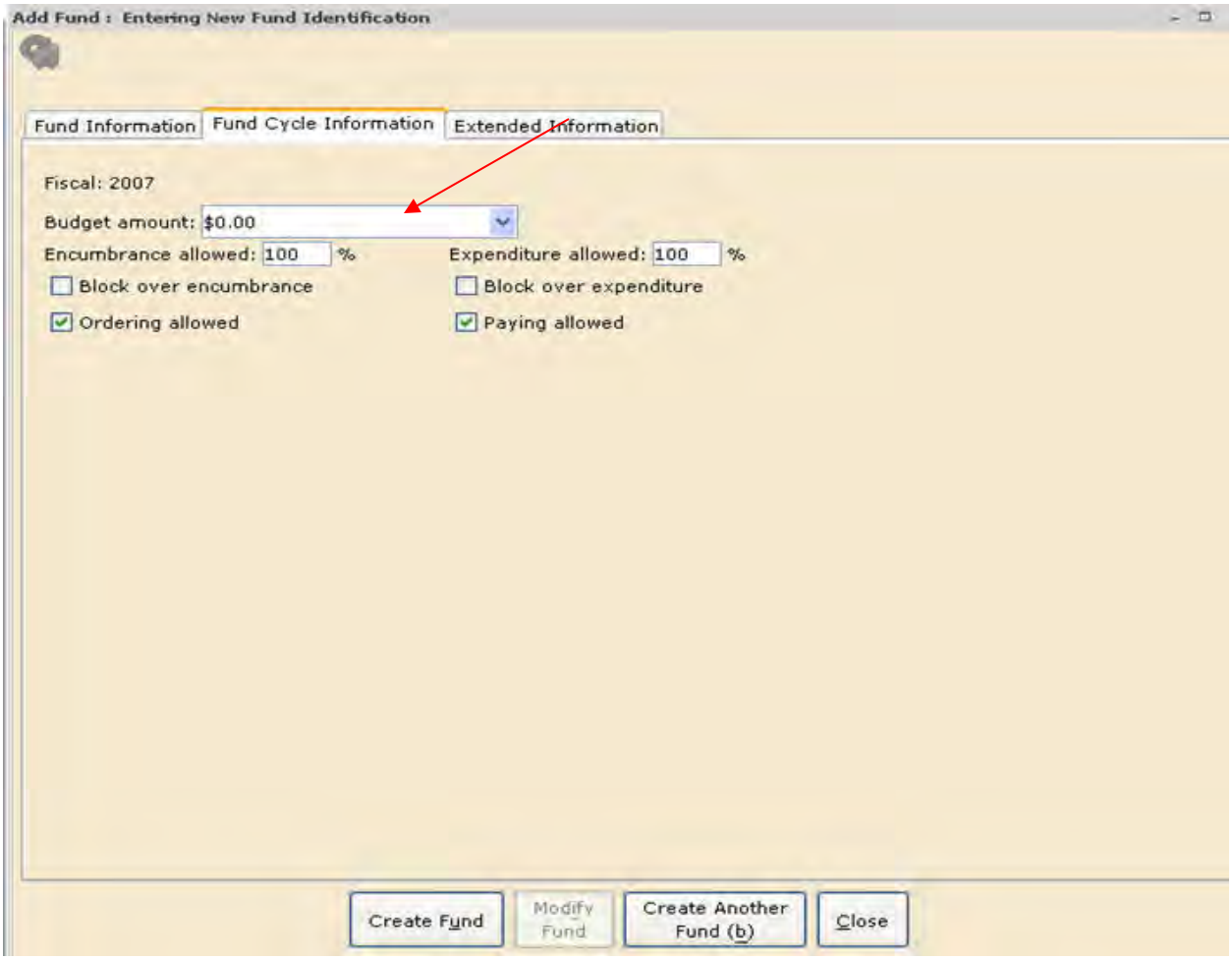
3. Click on the ***Name field*** and enter the complete name of the fund.

4. Enter the ***account number of the fund***. This is optional.

5. ***Levels 1, 2, 3, and 4*** are optional fields. Click on the arrows to select from the drop-down lists.

6. Click on the ***Fund Cycle Information Tab***.

   The Fund Cycle information will display




7. In the ***Budget amount field***, you can enter the dollar amount for this fund. The default is $0.00 or NOLIMIT, if you click on the arrow.

8. Encumbrance and Expenditure allowed by percentage. The default is 100%.

9. You will need to decide whether you want to block this fund from being over encumbered and/or over expended. Check the boxes if you choose to block over encumbrance and/or expenditure

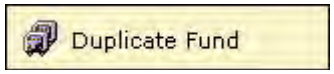
10. Ordering allowed and Paying allowed should be checked**.**

11. Click **Create Fund** or use the shortcut of Alt-U to create the fund.

12. To create another fund, click on the **Create Another Fund** or use the shortcut of Alt-B.

13. You do not need to enter any information in the **Extended Information Tab**.

# Duplicate Fund Wizard

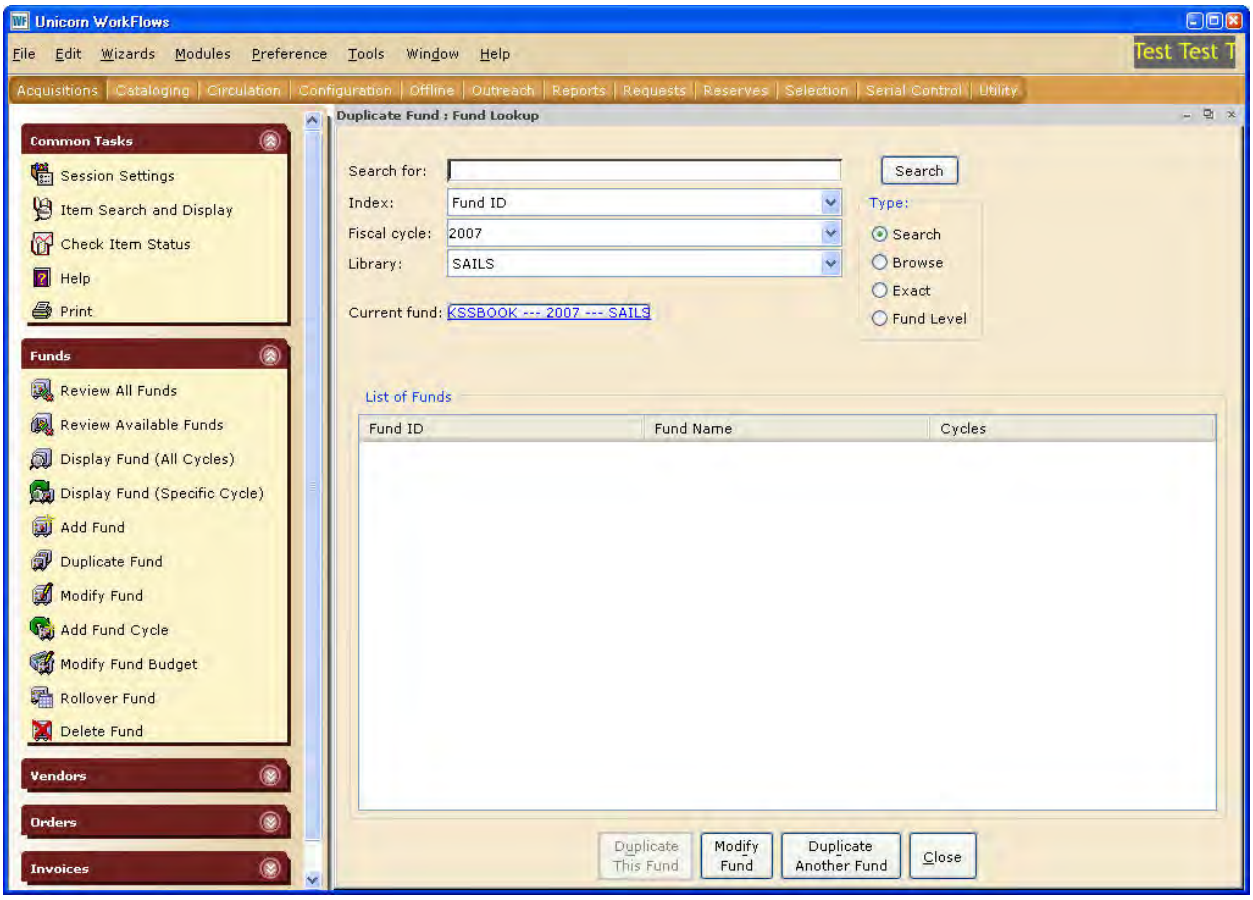



Use the Duplicate Fund wizard to duplicate a master fund record.

To duplicate a fund:

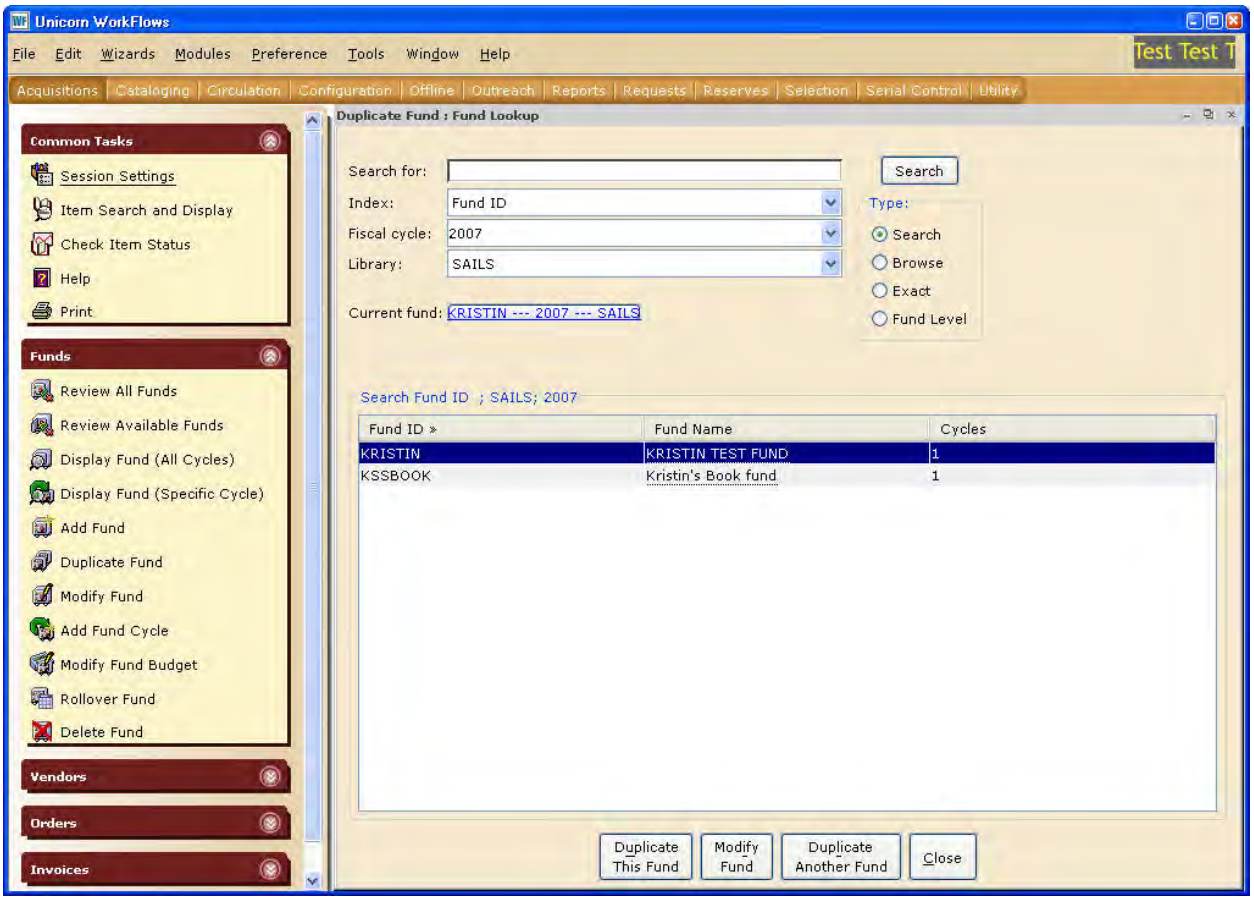
1. Click on the **Duplicate Fund wizard.**

   The search window will open.




2. Search for the fund that you want to duplicate.

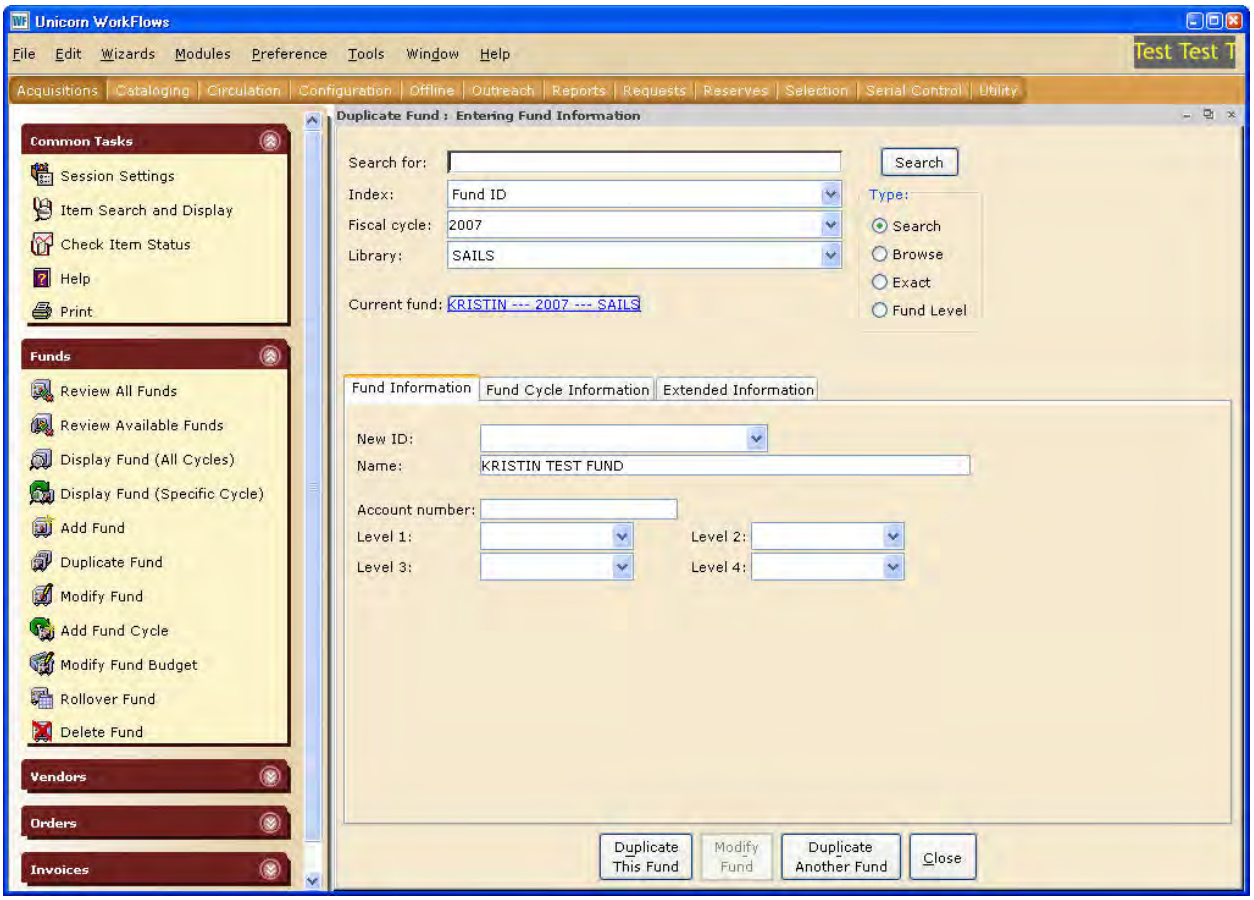
The fund search window will open.




3. Highlight the fund you want to duplicate.

4. Click **Duplicate This Fund**.

The Fund Information window will open.




5. Type in a ***New ID*** for this fund.

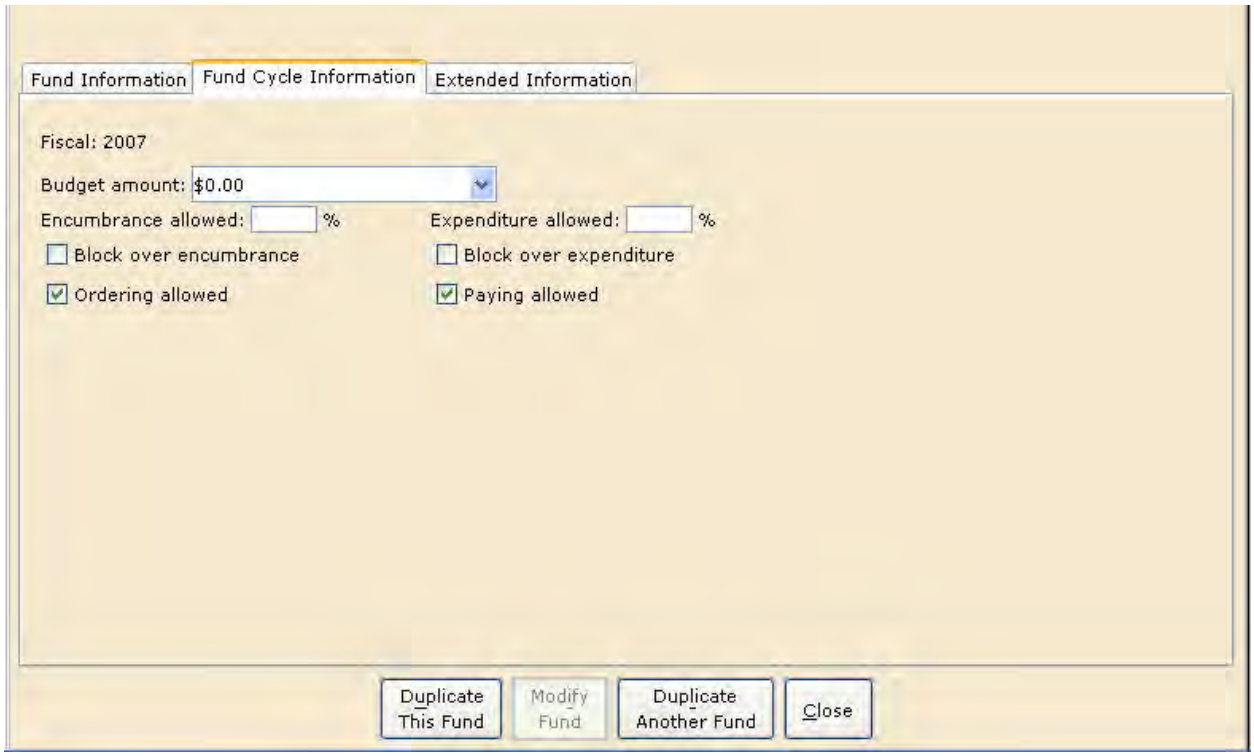
6. Click on the ***Name field*** and enter the complete name of the fund.

7. Enter the ***Account number*** for the fund. This is optional.

8. ***Levels 1, 2, 3, and 4*** are optional fields. Click on the arrows to select from the drop-down lists.

9. Click on the ***Fund Cycle Information Tab***.

The following screen appears:




10. In the Budget amount field you can enter the dollar amount for this fund. The default is $0.00 or NOLIMIT, if you click on the arrow.

11. Encumbrance and Expenditure allowed by percentage. The default is 100%.

12. You will need to decide whether you want to block this fund from being over encumbered and/or over expended. Check the boxes if you choose to block over encumbrance and/or expenditure.

13. ***Ordering allowed and Paying allowed should be checked***.

14. Click **Duplicate This Fund** or use the shortcut of Alt-U to create the fund.

15. To duplicate another fund, click **Duplicate Another Fund**.

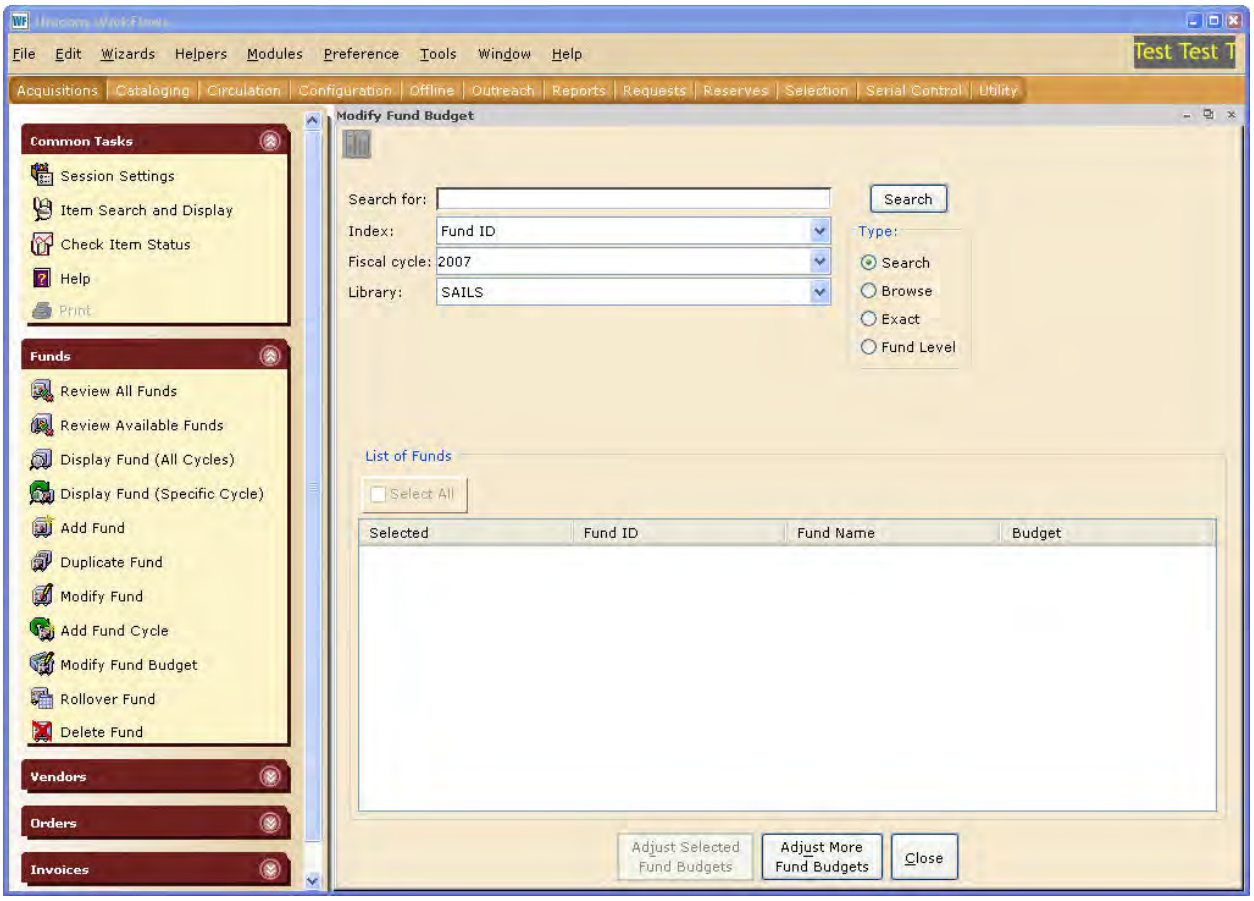
16. You do not need to enter any information in the **Extended Information Tab**.

# Modify Fund Budget Wizard

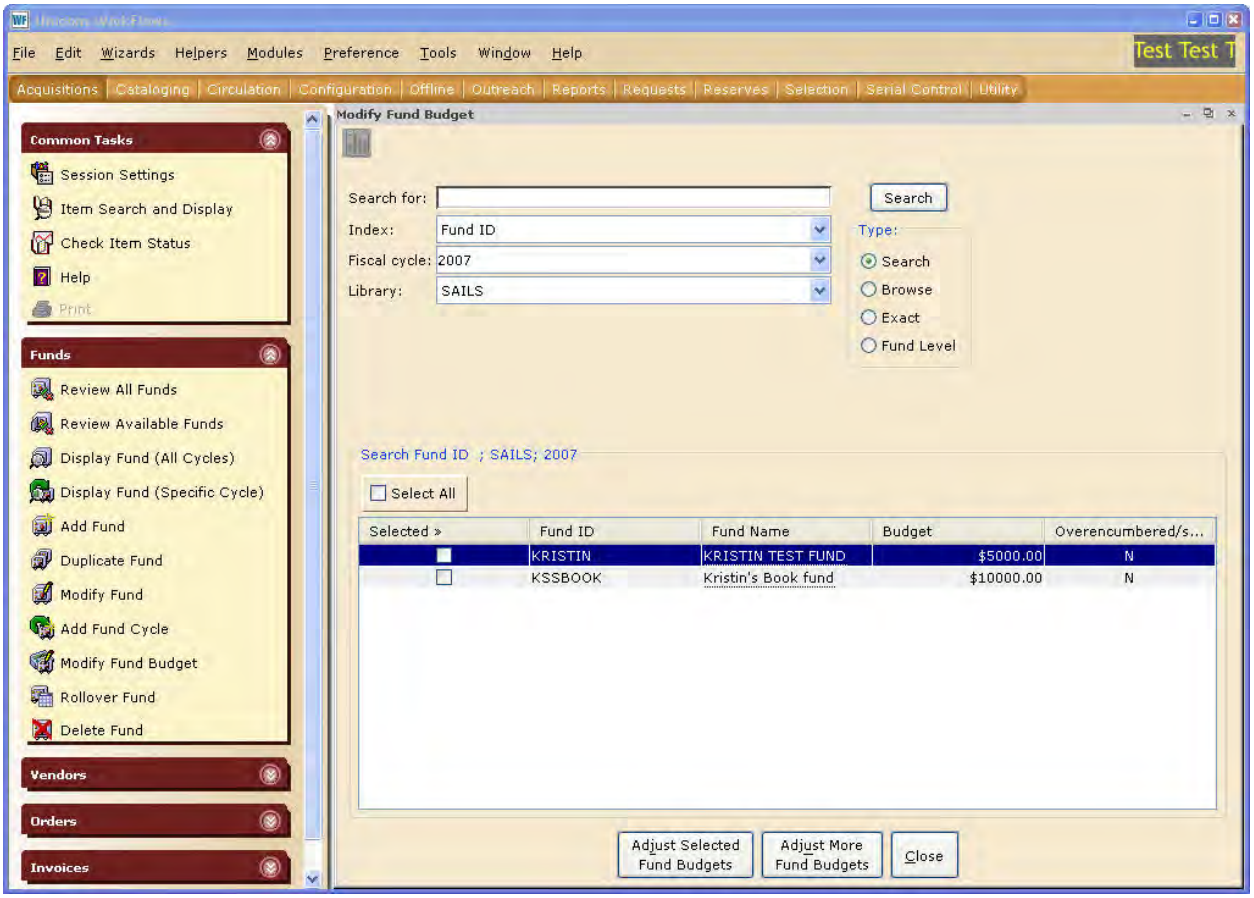

Use the Modify Fund Budget wizard to adjust the budget amount in a selected fund.

1. Click on the **Modify Fund Bedget wizard**.

   The search window will open.



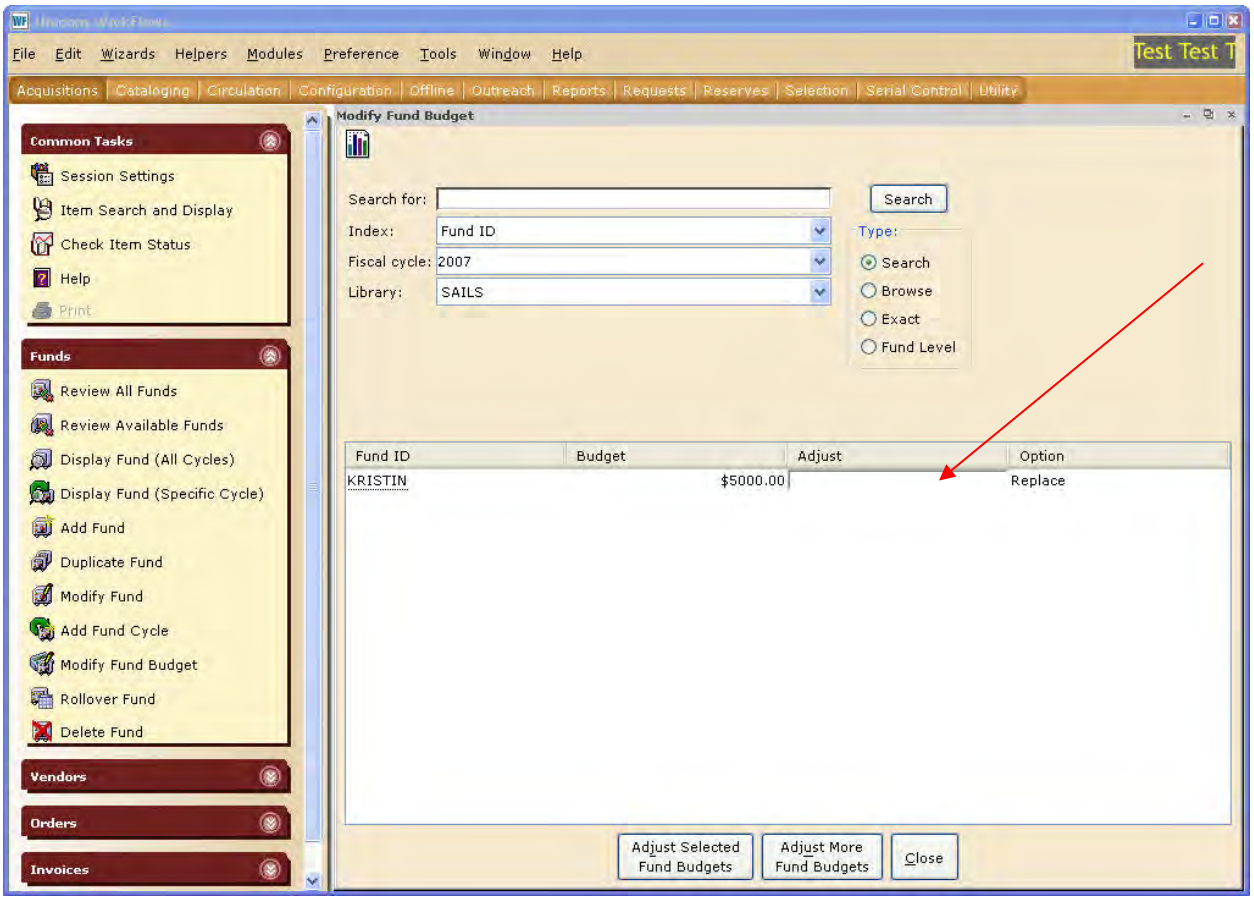
2. Search for the fund or funds that you want to modify.




3. Select the fund or funds you want to modify by checking the box or boxes.

4. Click **Adjust Selected Fund Budgets**.

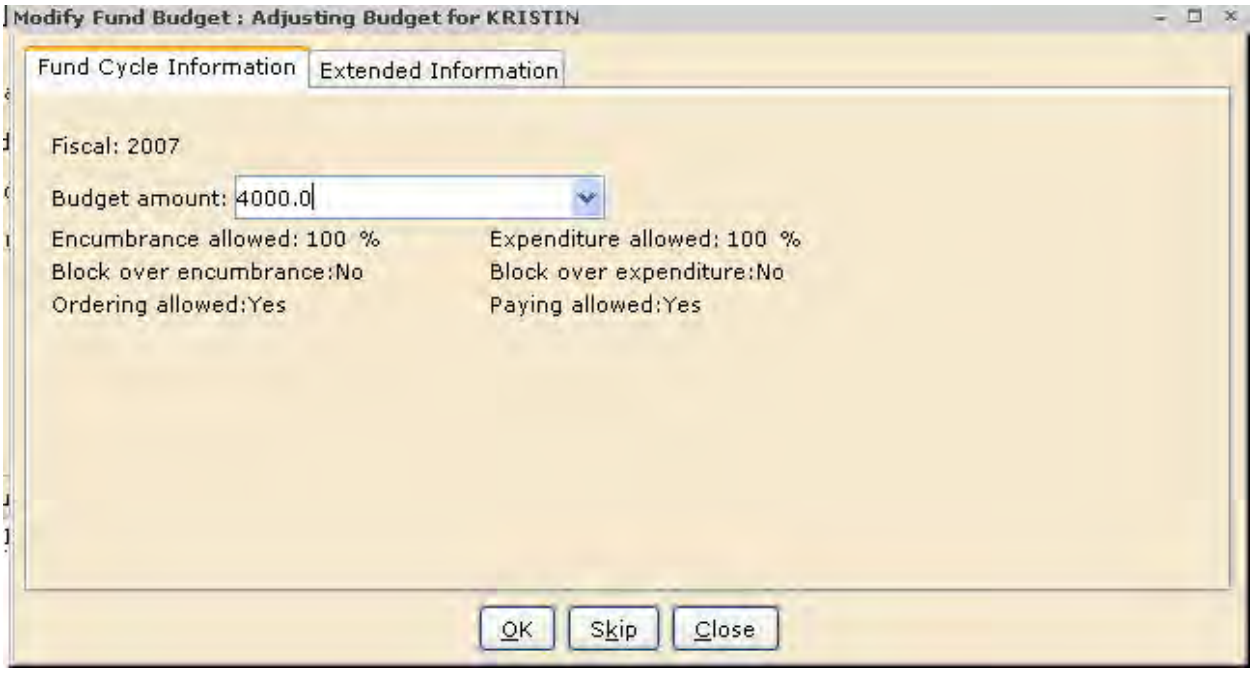
The Modify Fund Budget screen appears:




5. Click on the ***Adjust field*** and type in an amount.

6. Click the ***Option field*** and select from the drop-down list to either ***Decrease, Increase, or Replace*** the fund budget by this amount.

7. When you have finished making adjustments, click **Adjust Selected Fund Budgets**. The following window will open (see example on next page).

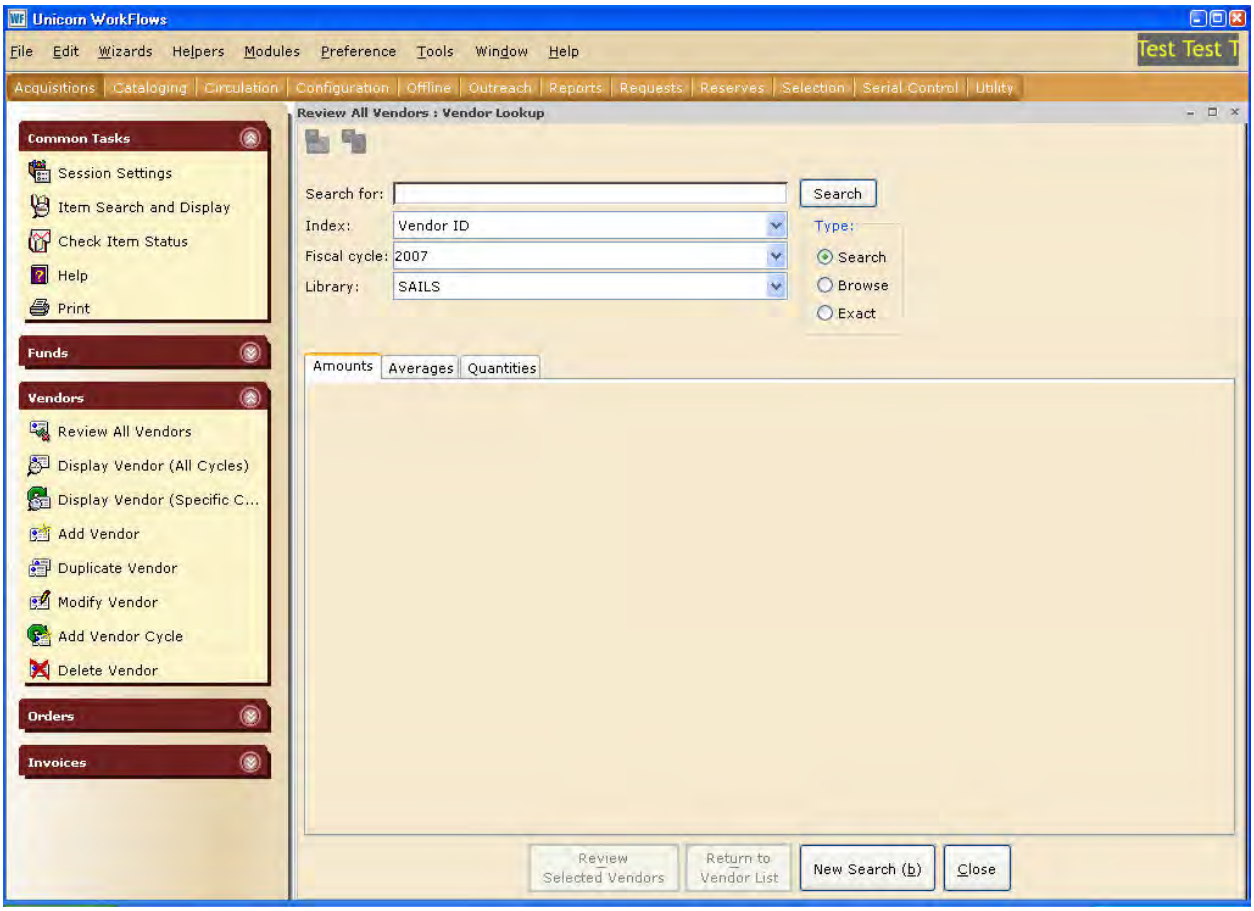



8. Click **OK.** When complete, the wizard will display a confirmation dialog, stating the number of funds adjusted. Click **OK**.

9. The screen now displays the adjusted fund amounts for all listed funds. You can **Continue to Adjust These Fund Budgets, Adjust Different Fund Budgets, or Quit**.

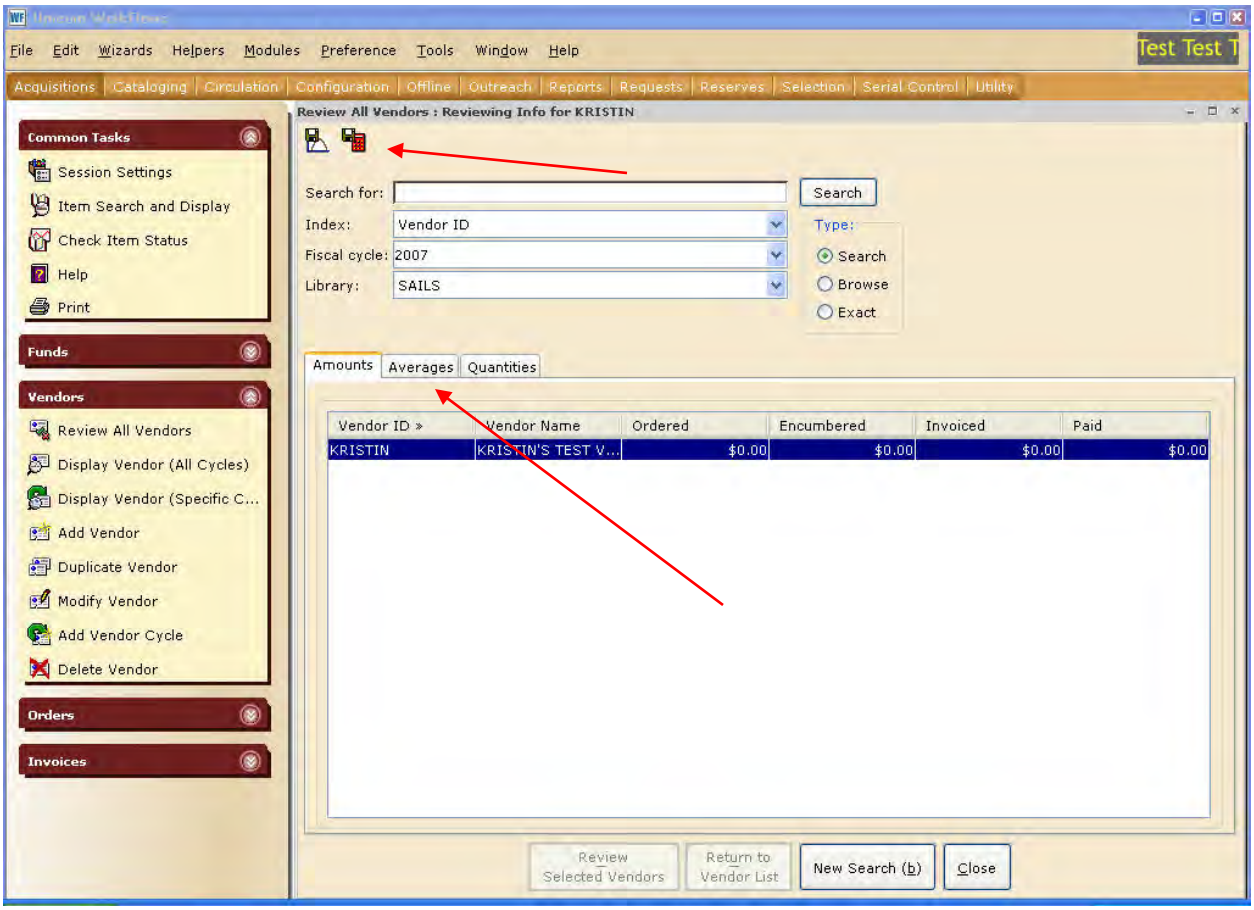
# Review All Vendors Wizard


1. Click on the **Review All Vendors** wizard. The Vendor search screen will open.




2. Search for the vendors you want to review.

3. Vendor information for the selected fiscal cycle appears in tables on the following tabs:
   *Amounts, Averages, Quantities*




## Save Averages Data File helper and Save Amounts and Quantities Data File helper

***Save Averages Data to a File helper*** is available for you to save specific averages information to a file on your workstation. The helper outputs averages data in a comma-delimited format and saves the data to a file with a .csv extension. This file can be viewed using a spreadsheet application.

***Save Amounts and Quantities Data to a File helper*** is available for you to save specific amounts and quantities information to a file on your workstation. The helper outputs amounts and quantities data in a comma-delimited format and saves the data to a file with a .csv extension. This file can be viewed using a spreadsheet application.

To use the helpers, follow these steps.

1. In the Review All Vendors window, click on either the ***Save Averages Data to a File*** helper or the ***Save Amounts and Quantities Data to a File*** helper.

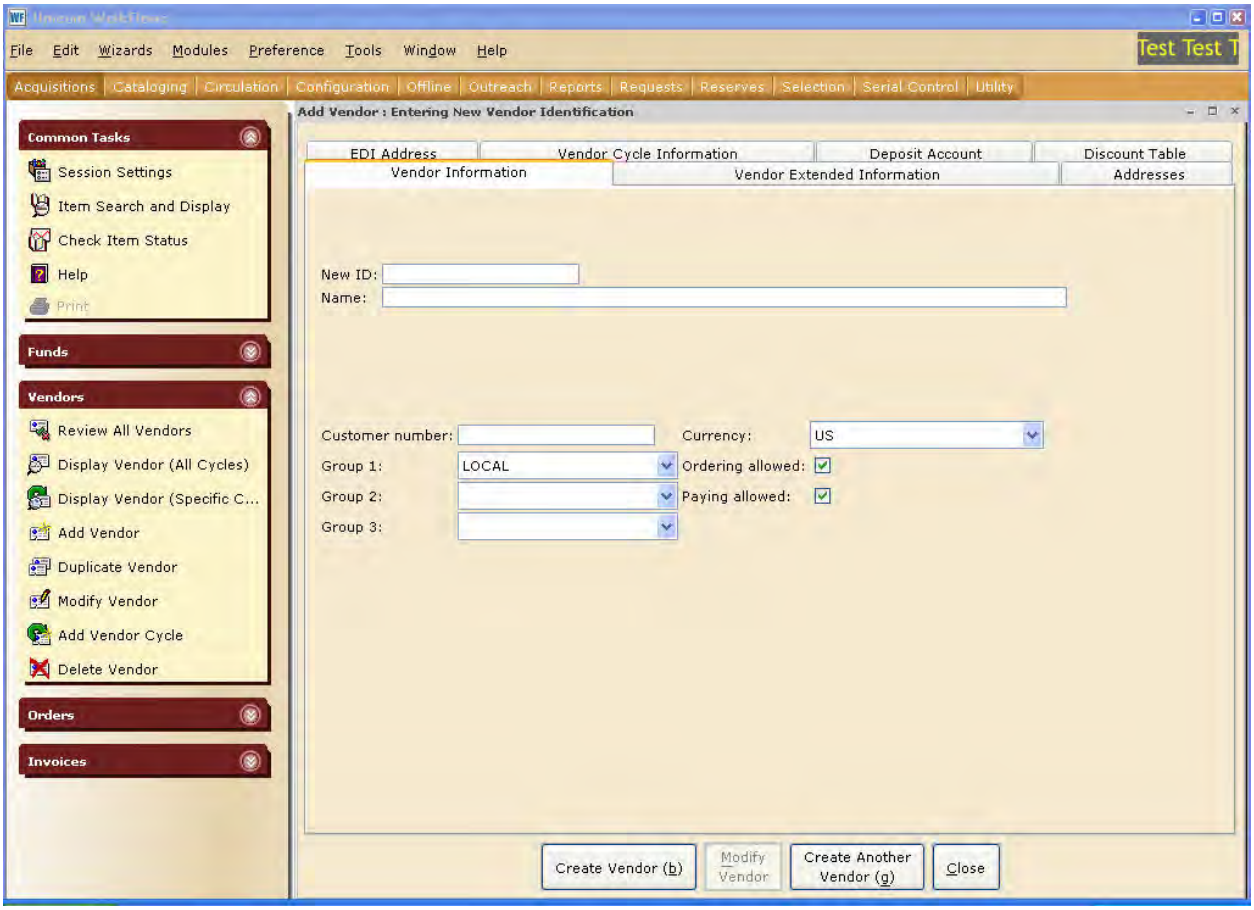
2. A window opens, allowing you to choose a folder on your workstation. Type in a file name with .csv extension and then click Save.

3. You can then open the file using a spreadsheet program (such as Excel).

# Add Vendor Wizard


Use the Add Vendor wizard to create a master vendor record.

1. Click on the **Add Vendor wizard**. The Vendor Information Tab will open.




2. Click on the ***New ID field*** and enter a Vendor ID. Use your two or three letter library code and the vendor name or abbreviation (such as HAN-BTADULT ).

3. Click on the ***Name field*** and enter the full name of the Vendor (such as Baker and Taylor Adult or Ingram Children's account).

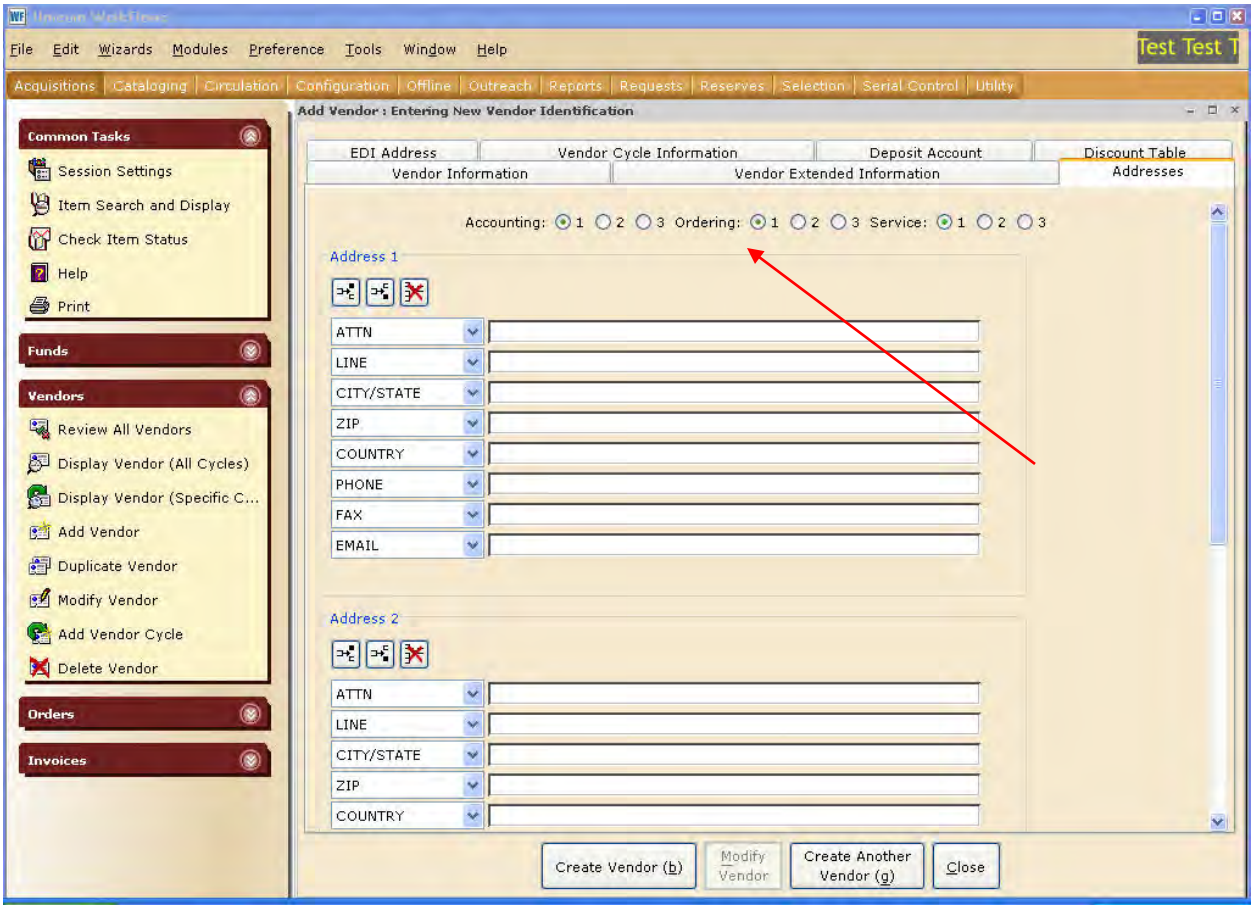
4. Enter your customer number.

5. Vendor Groups 1 – 3 are used to group Vendors together. Click on the arrows to select from the drop-down list.

6. Currency is US.

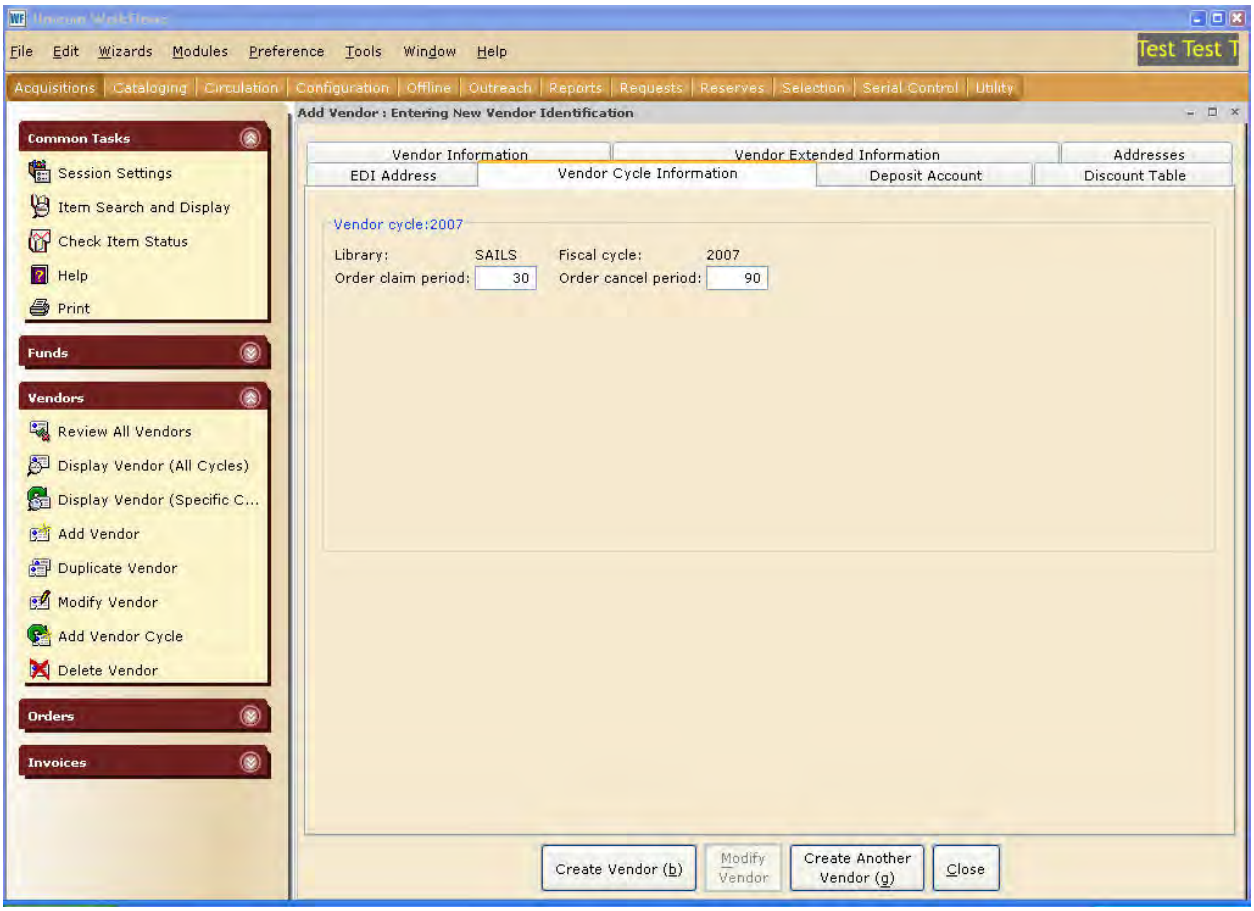
7. ***Ordering Allowed and Paying allowed should be checked***. This will allow you to place and pay for orders.

8. Click on the ***Addresses Tab*** to enter the Vendor's address. You can enter up to 3 addresses for Accounting, Ordering, and Service. A one, two, or three is selected to indicate which of the three addresses is used for accounting, ordering, or service. ***If a number is not explicitly selected, the first address is used for accounting by default.***



9. Click on **the Vendor Cycle Information tab**.

The Vendor Cycle information tab will open. This tab contains the information about the current fiscal cycle, the order claim period and the order cancel period. The default settings are 30 days for claiming and 90 days for canceling.

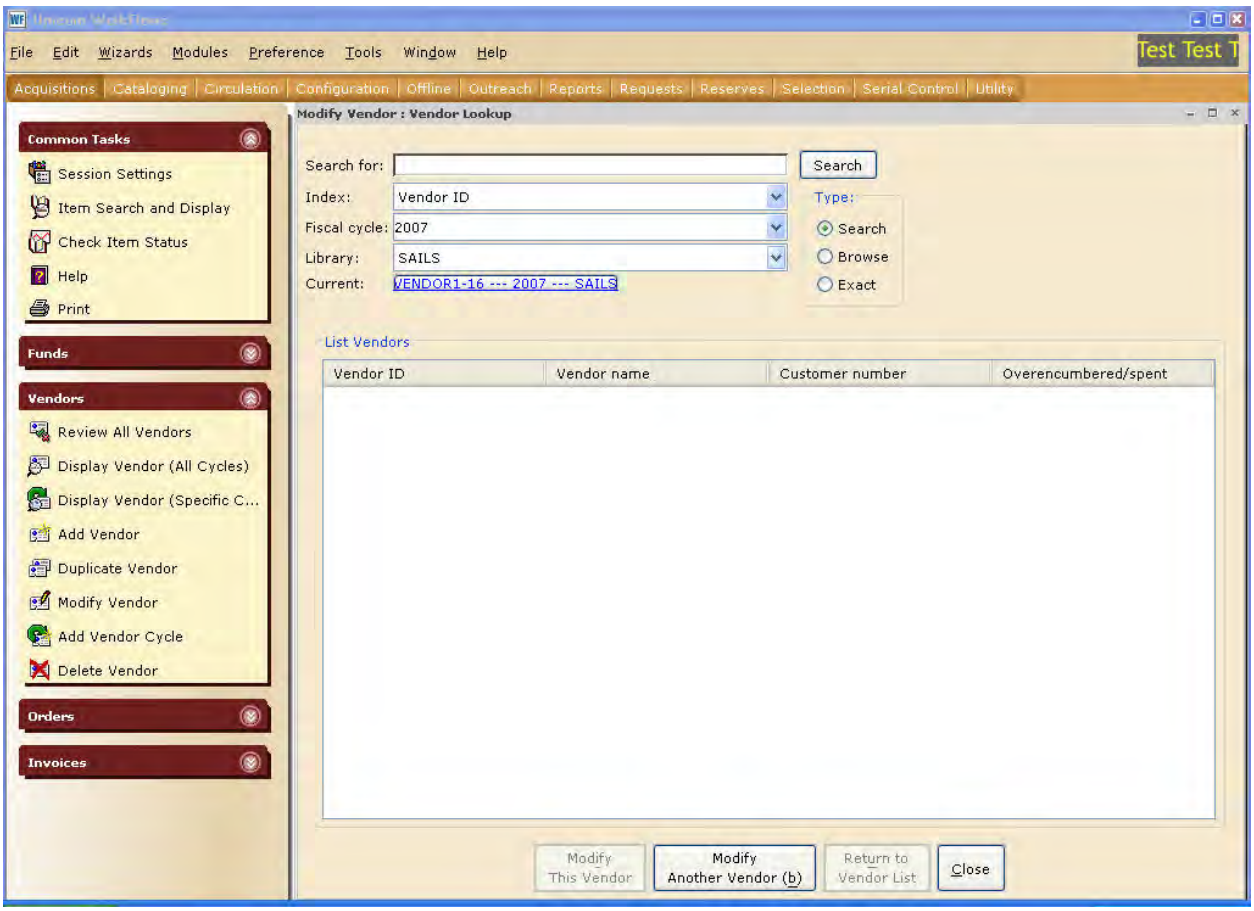



10. The Deposit Account and Discount Table tabs are optional.

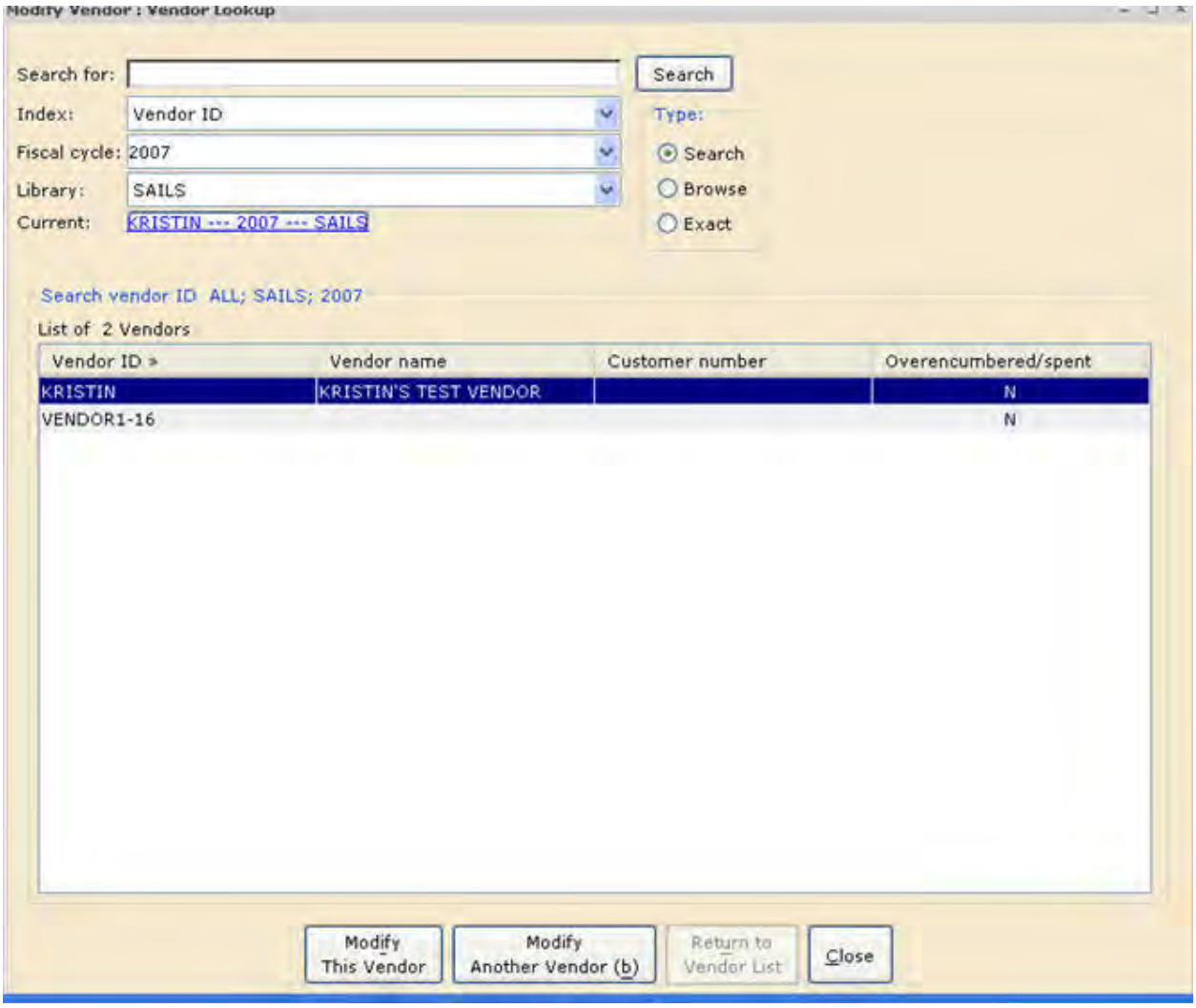
11. Click **Create Vendor**.

# Modify Vendor Wizard


Click on the **Modify Vendor wizard** to modify a vendor's record. The Vendor search window will open.

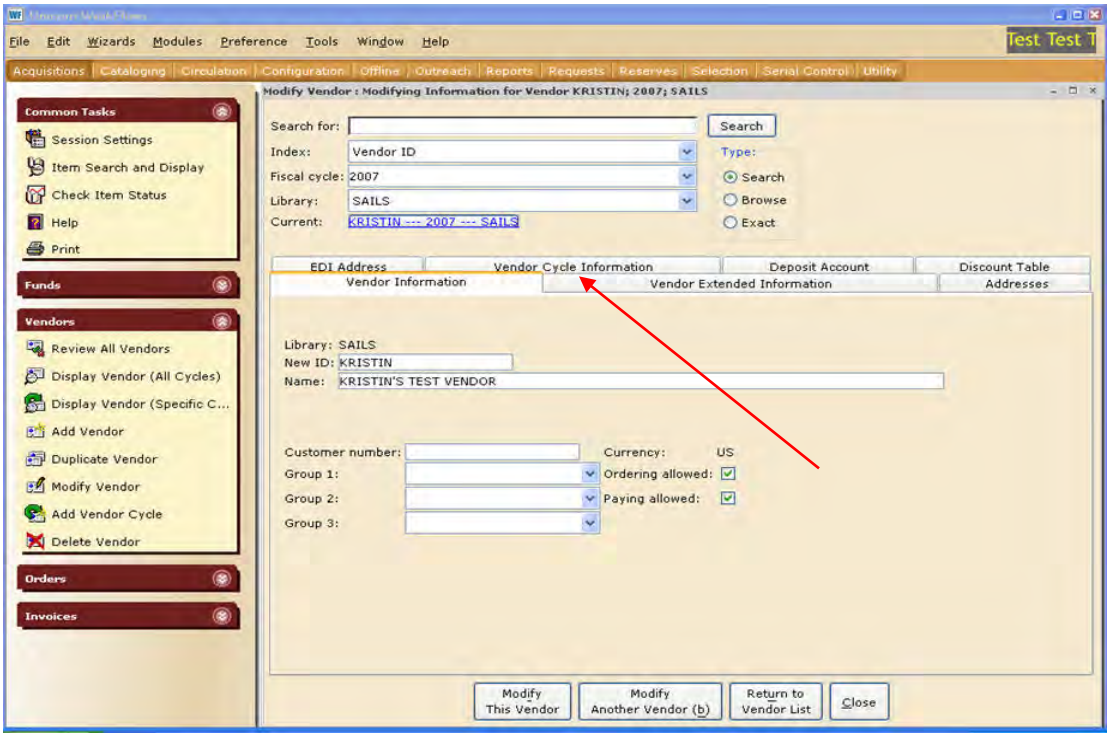


1. Search for the Vendor you want to modify.




2. Highlight the Vendor you want to modify and Click **Modify This Vendor**.

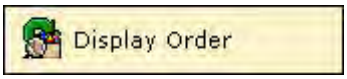
The record will open at the Vendor Information tab.




3. Click on the tab that you need to edit. Then click **Modify This Vendor**. You will not receive a confirmation that the record has been edited.

4. Click **Modify Another Vendor, Return to Vendor List, or Close.**

# Display Order Wizard

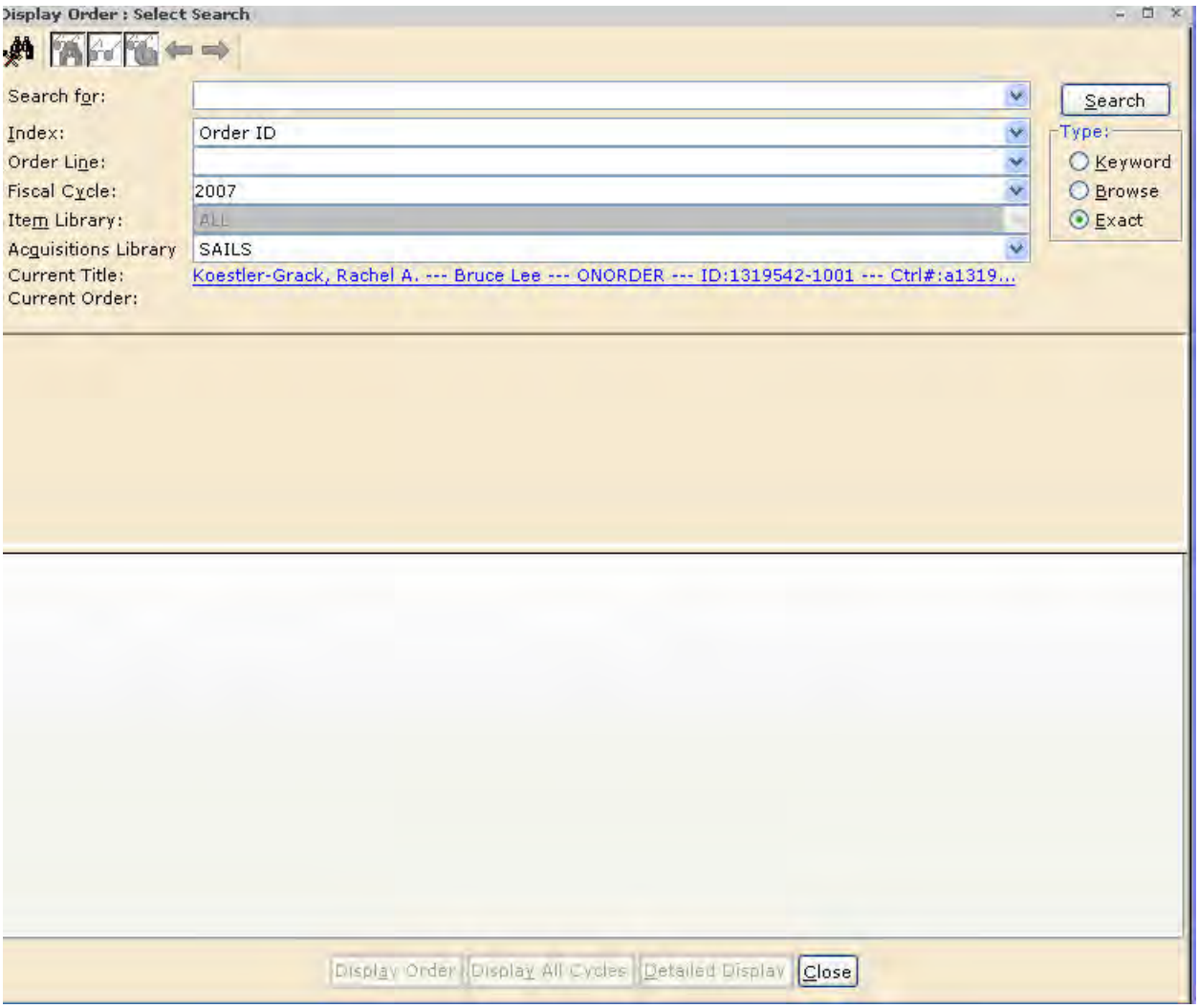



The Display Order wizard will display an existing order from any fiscal cycle. Detailed order summary and orderline information can be displayed by this wizard.

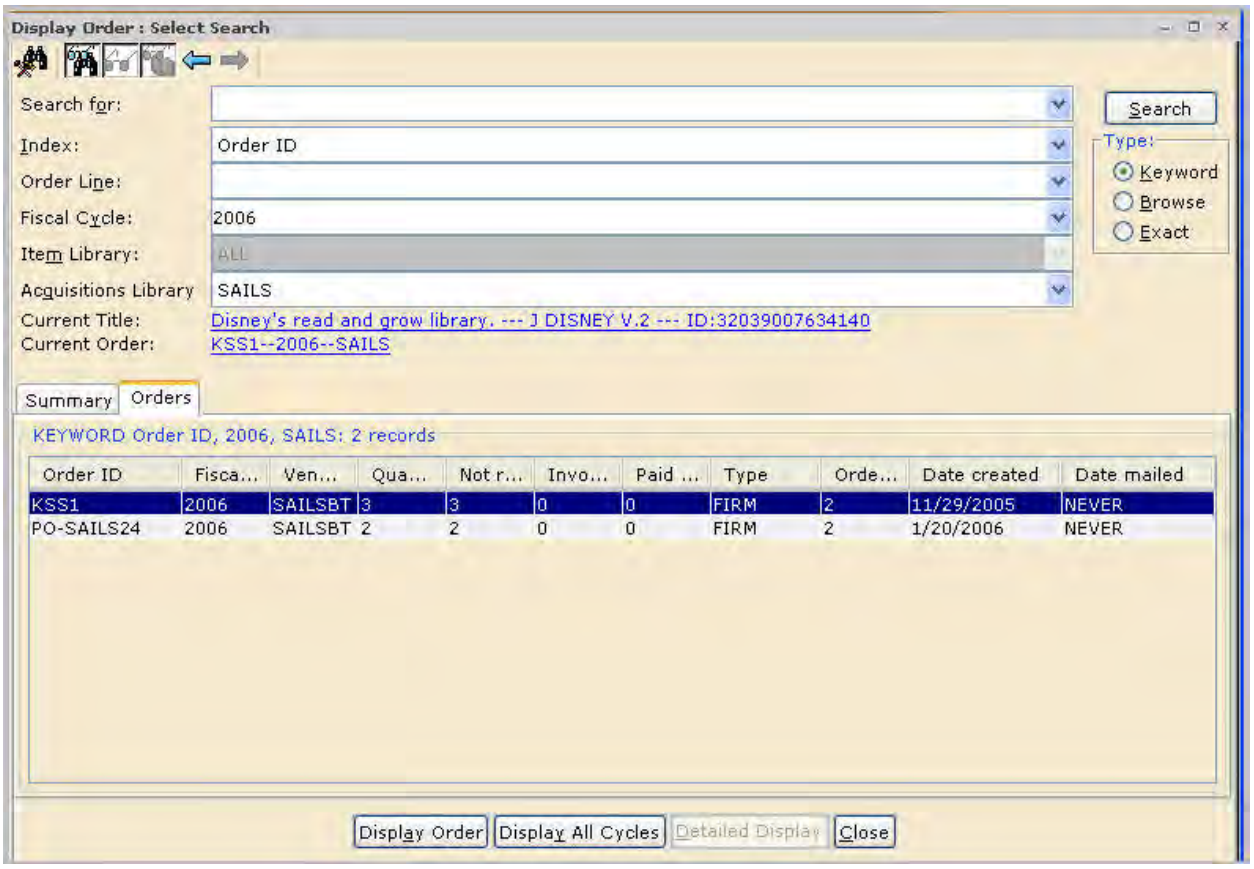
1. Click on the **Display Order wizard**. The order search window will open. You must specify a fiscal cycle or the search will use the default fiscal cycle. You can further qualify your search by selecting a specific order line.

2. Enter the order you wish to search for and then click **Search**. If you want to review all orders leave the search box empty. Change the search type to **Keyword** and then click **Search**.

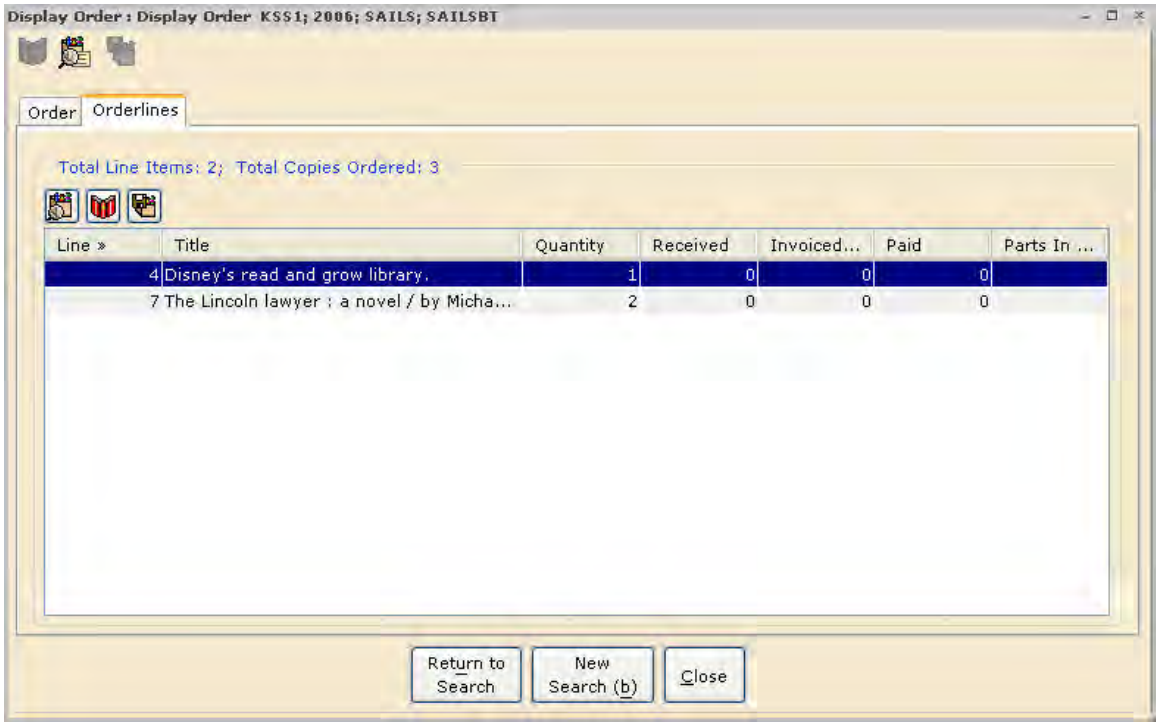
   A list of orders will display.



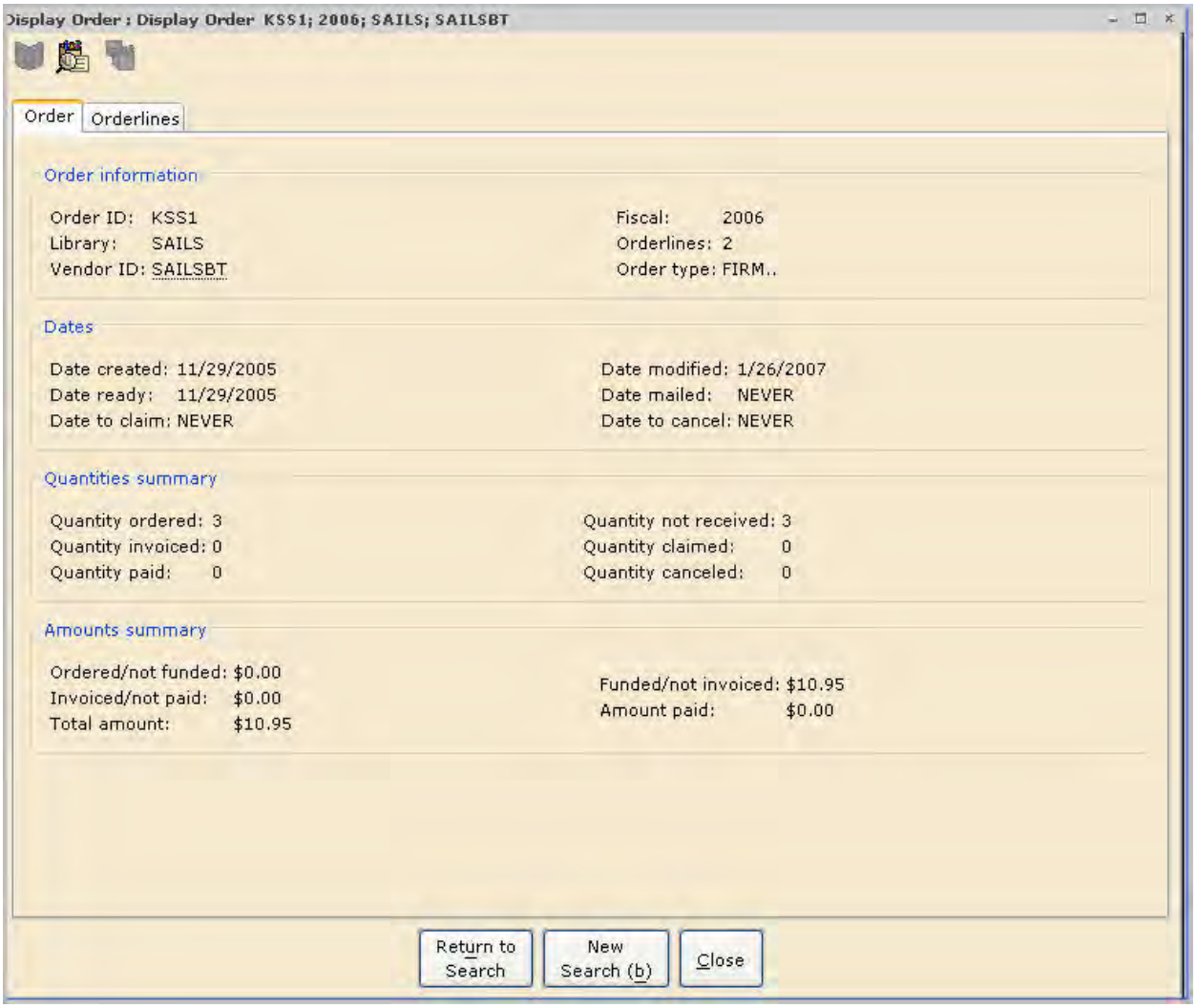
Example of  a search without entering a specific order:



3. Highlight the order you wish to see and click **Display Order**. The Orderlines tab will open displaying Line, Title, Quantity, Received, Invoiced, Paid, etc.



4. Click on the Order Tab to display a summary of the Order.

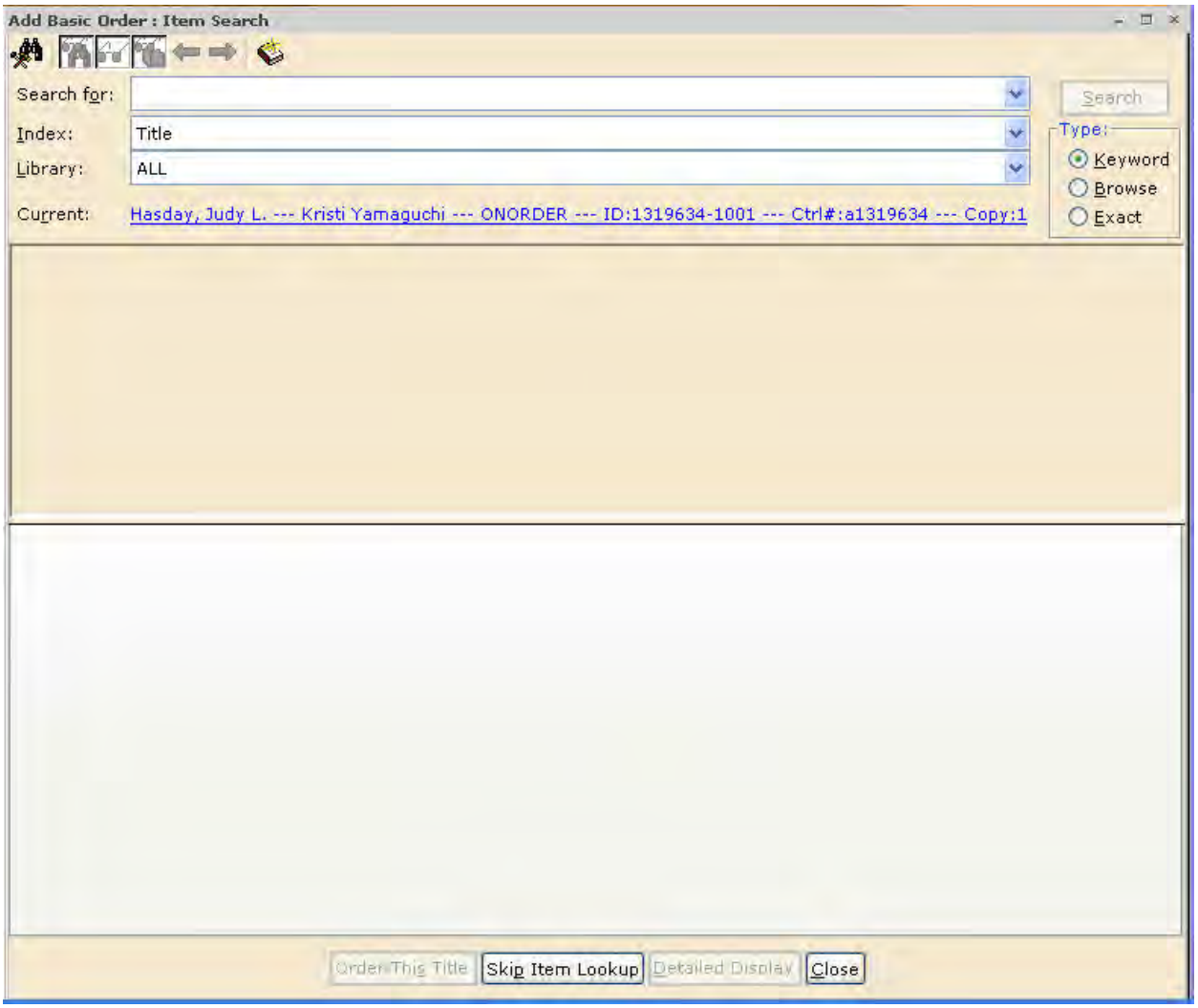


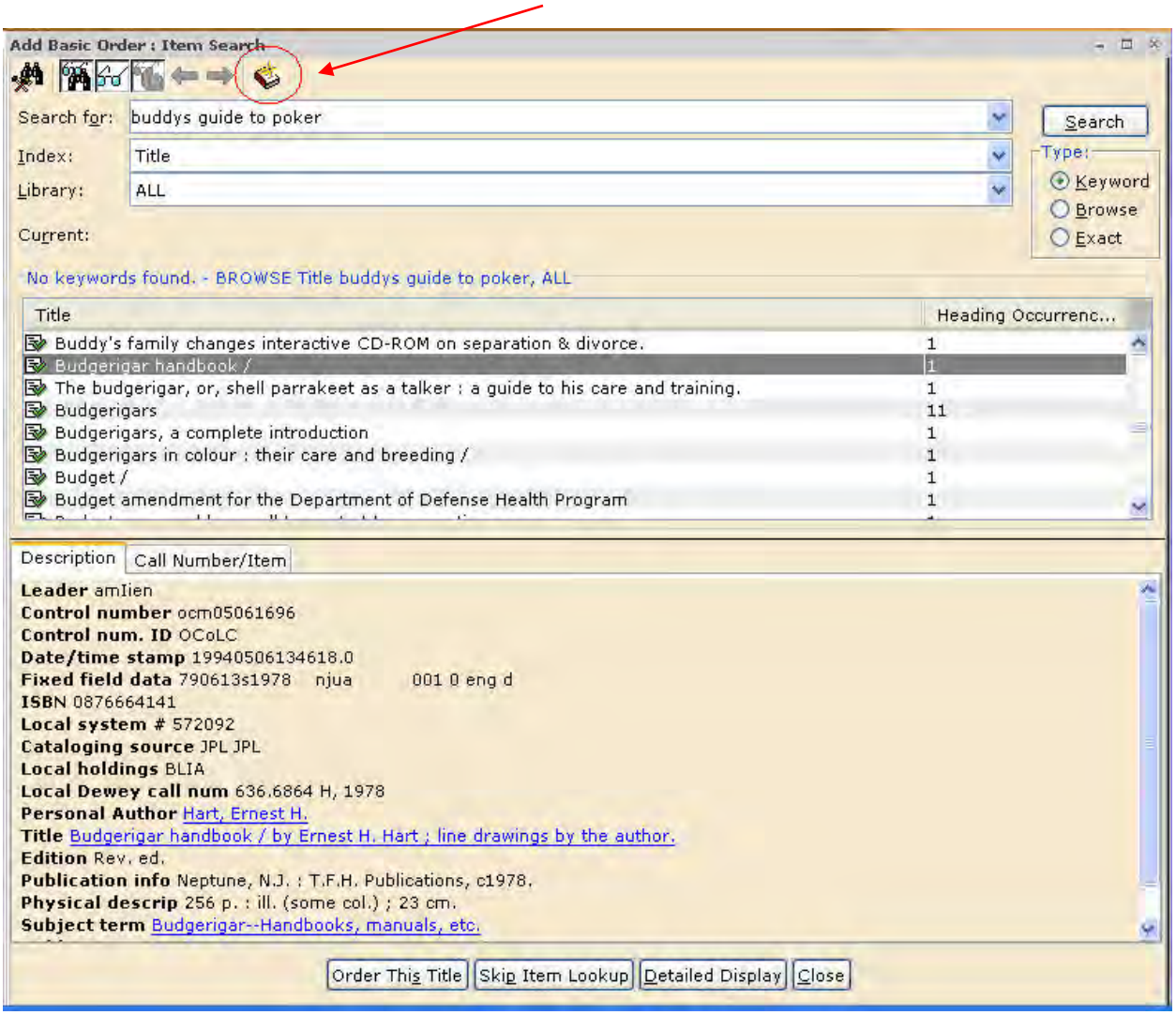

5. Click **Return to Search, New Search, or Close**.

# Add Basic Order Wizard


The Add Basic Order wizard will allow the creation of any basic order type, such as a firm order, supply orders, and one time purchases.

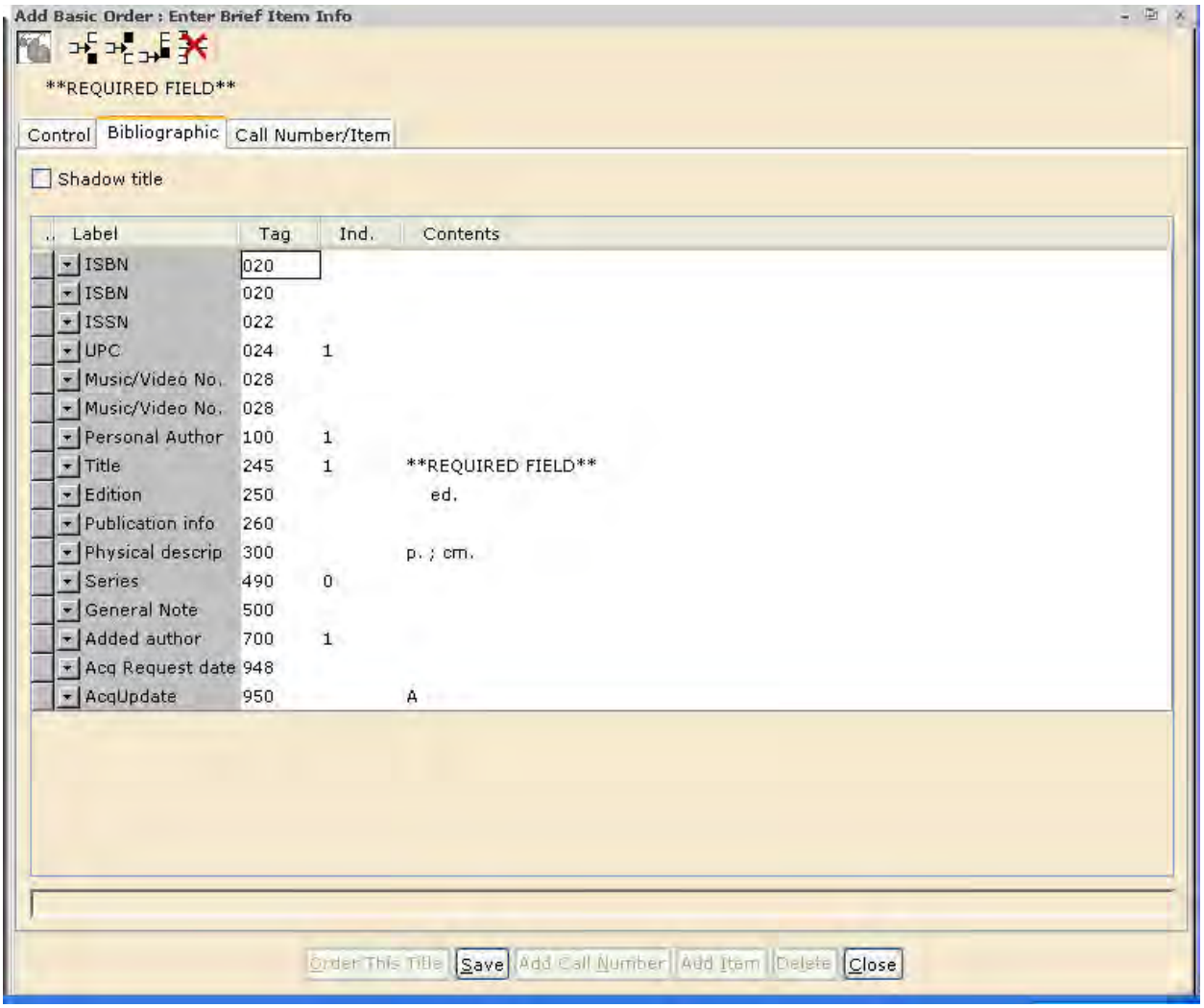
1. To create an order, Click on the **Add Basic Order wizard**. The Item search window will open.





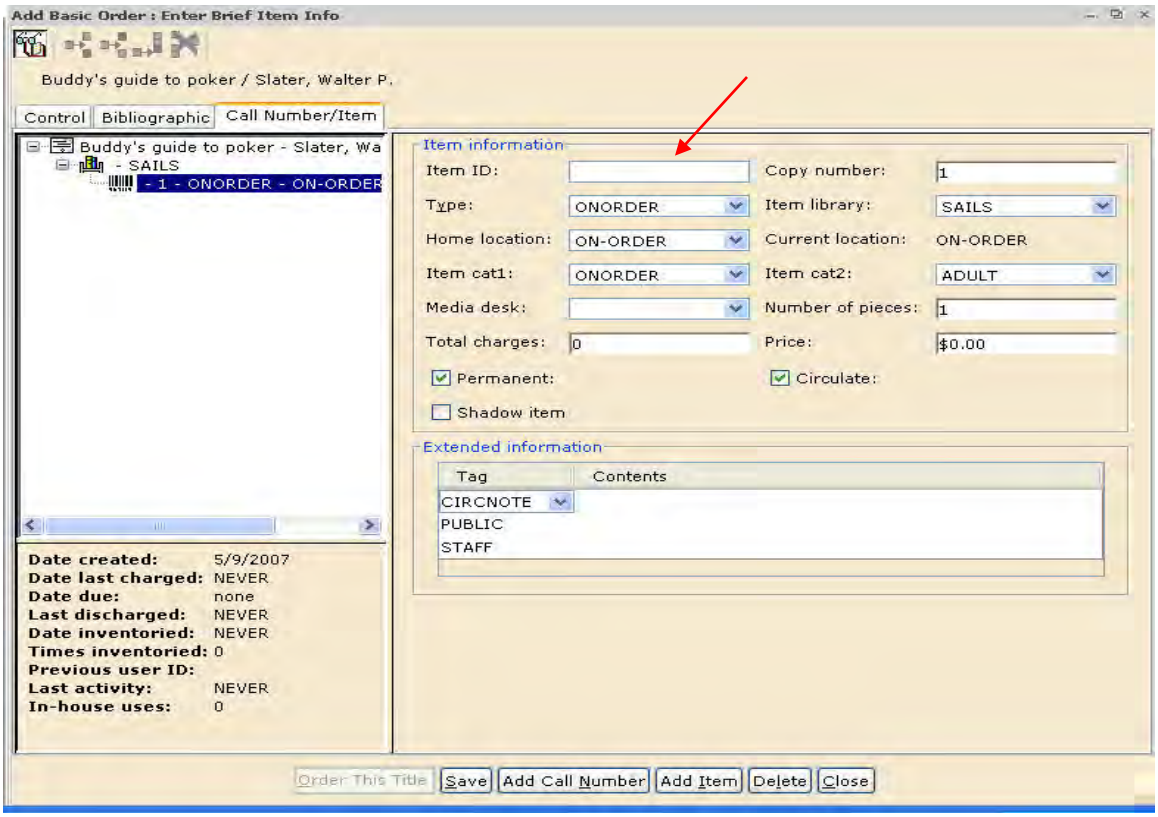

2. Search for a matching record in the database. If there is no matching record, click on the ***Add Temporary Title*** helper.

3. The ACQ template will open.




4. Enter the bibliographic information for the item.

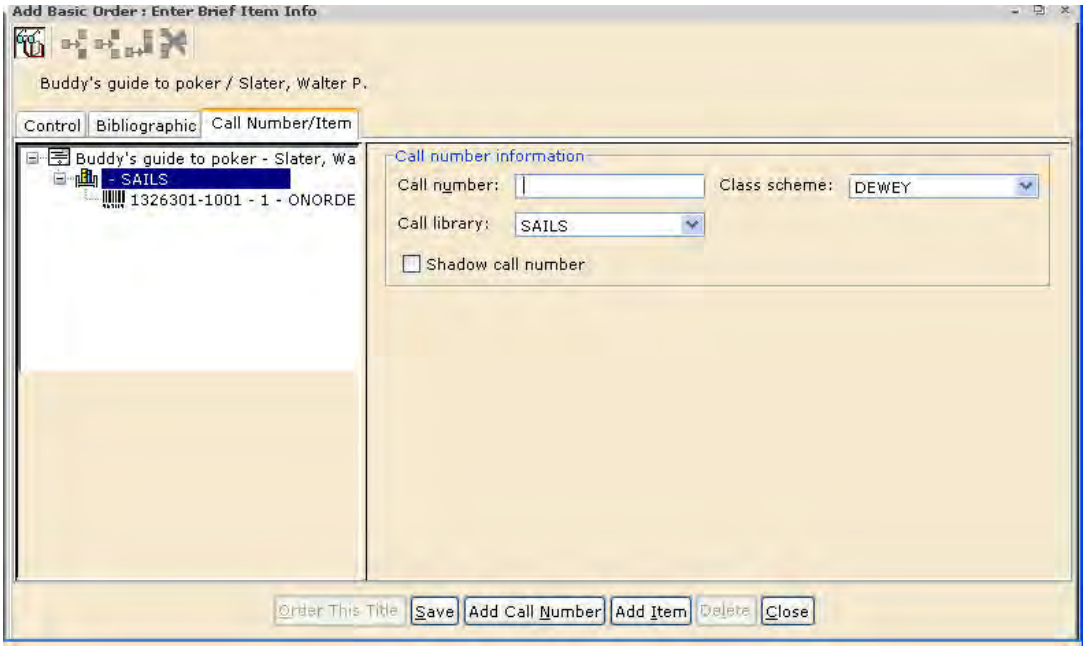
5. Then Click on the Call Number/Item Tab.



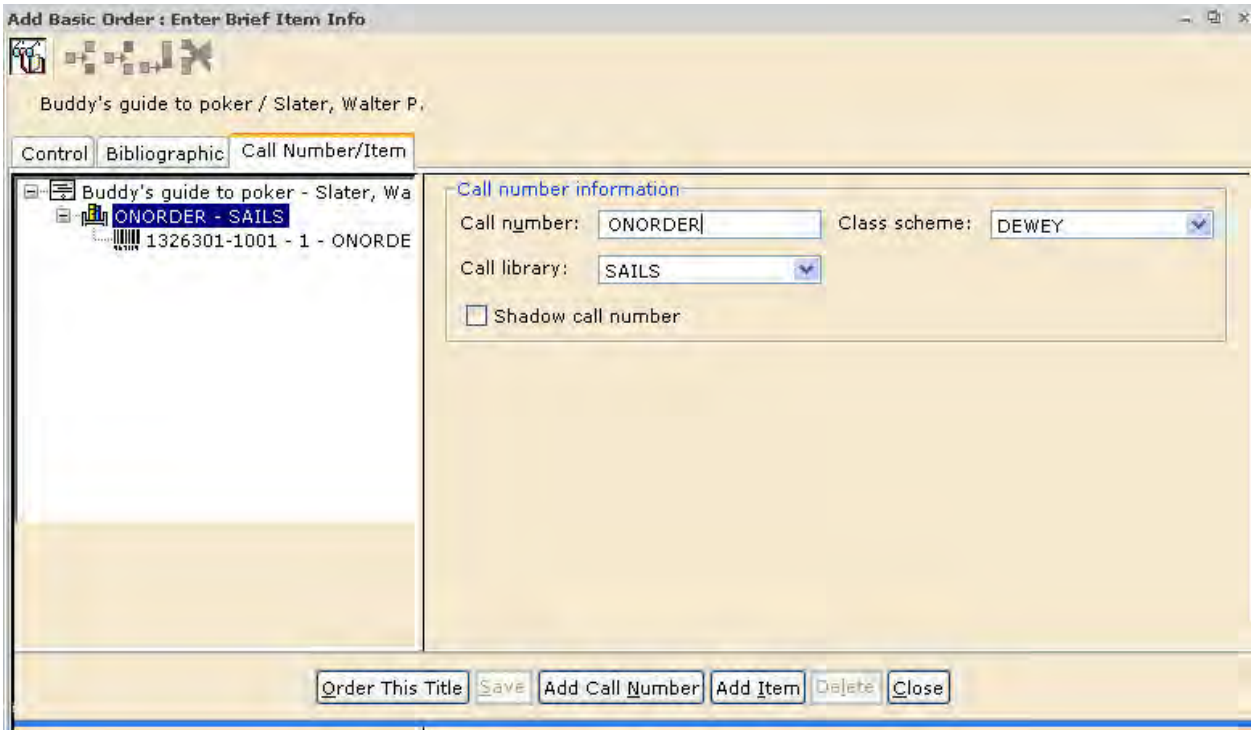

6. Enter an Item ID. If you want to use a system generated barcode, type AUTO in the Item ID field.

7. Click **Save.**
8. Now click on  in the Call Number pane.

9. The Call Number information screen will open.



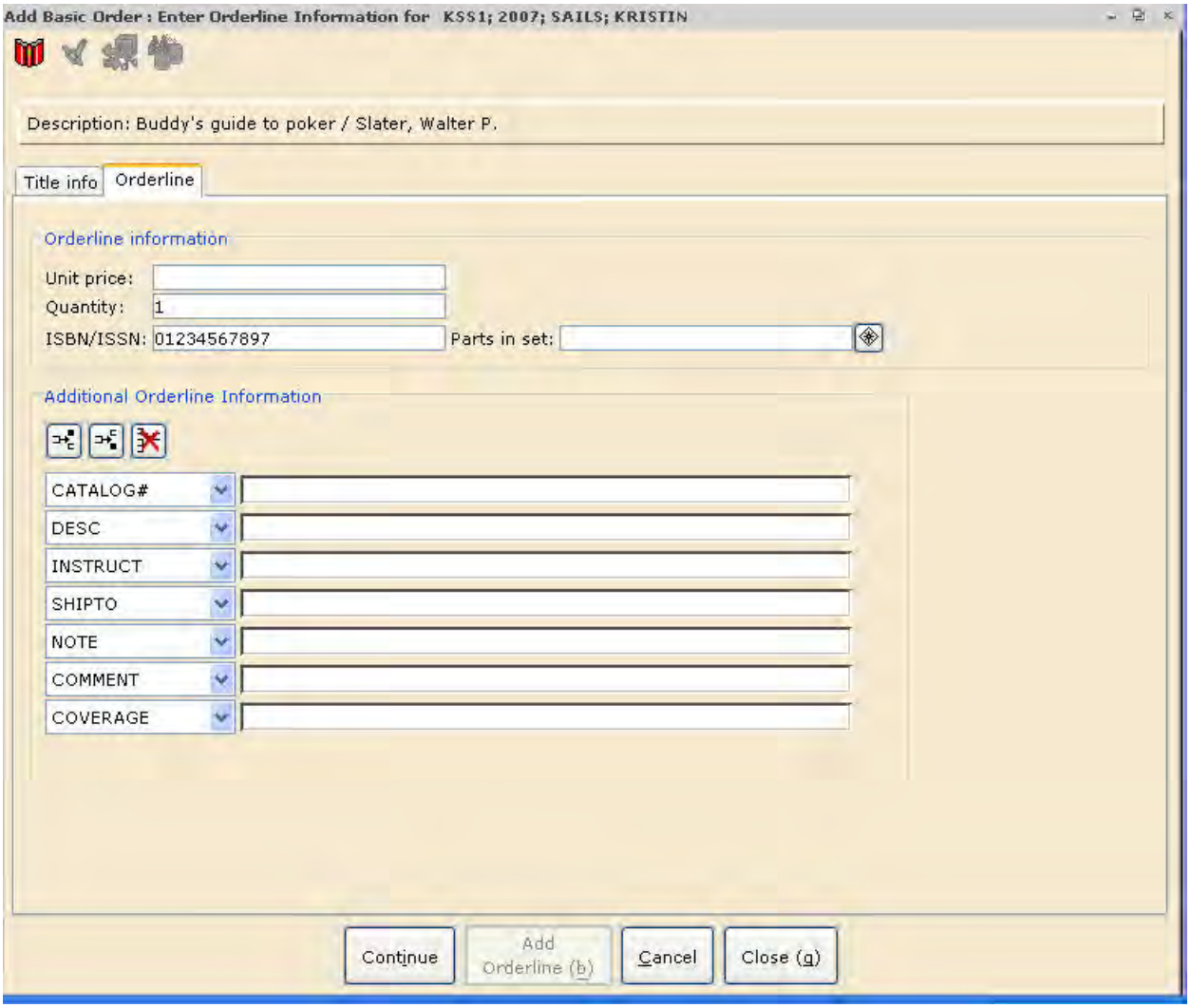

10. Enter your call number and then click **Save**.



11. Click **Order This Title**. The Add Basic Order: Enter Order Information window will open.

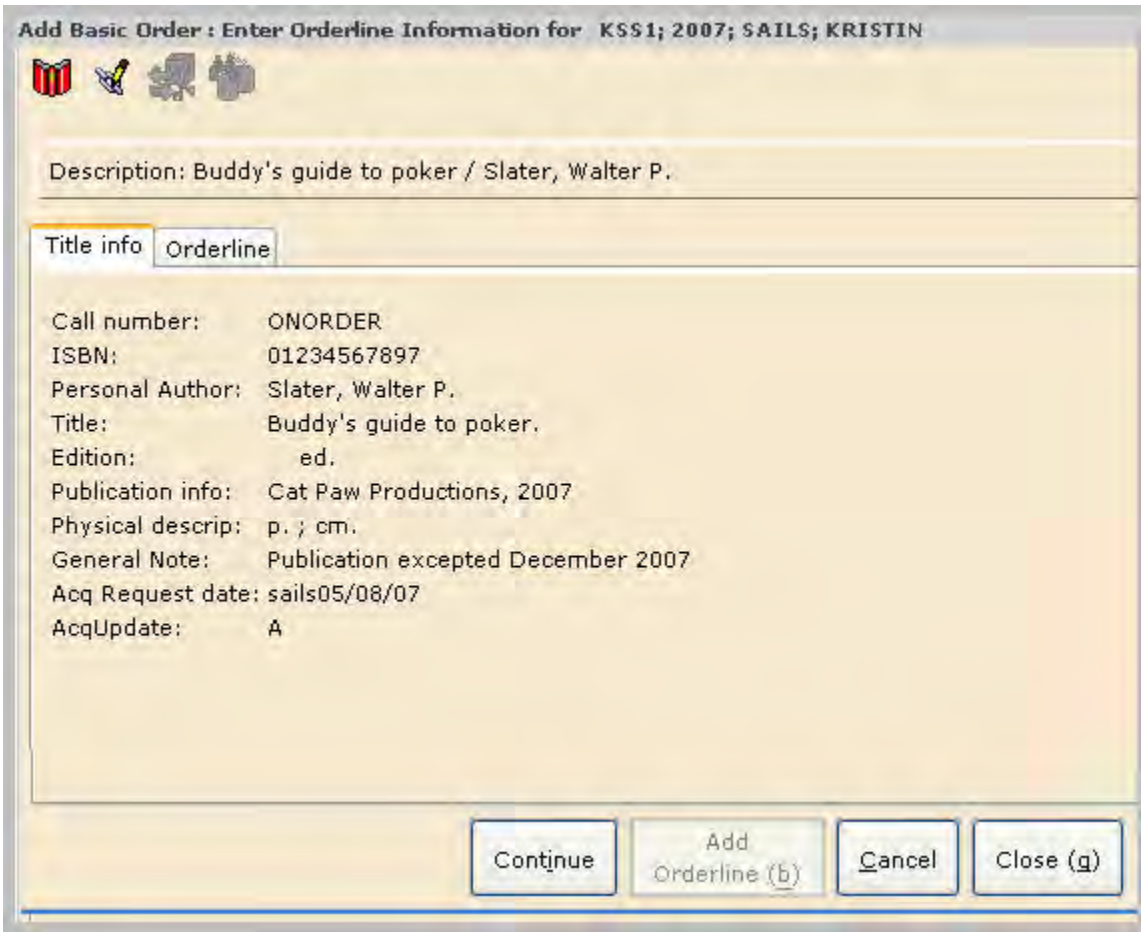

12. Enter the Order ID.

13. Click **Add Order**. The Enter Orderline information window opens and displays the Title Info and Orderline tabs.



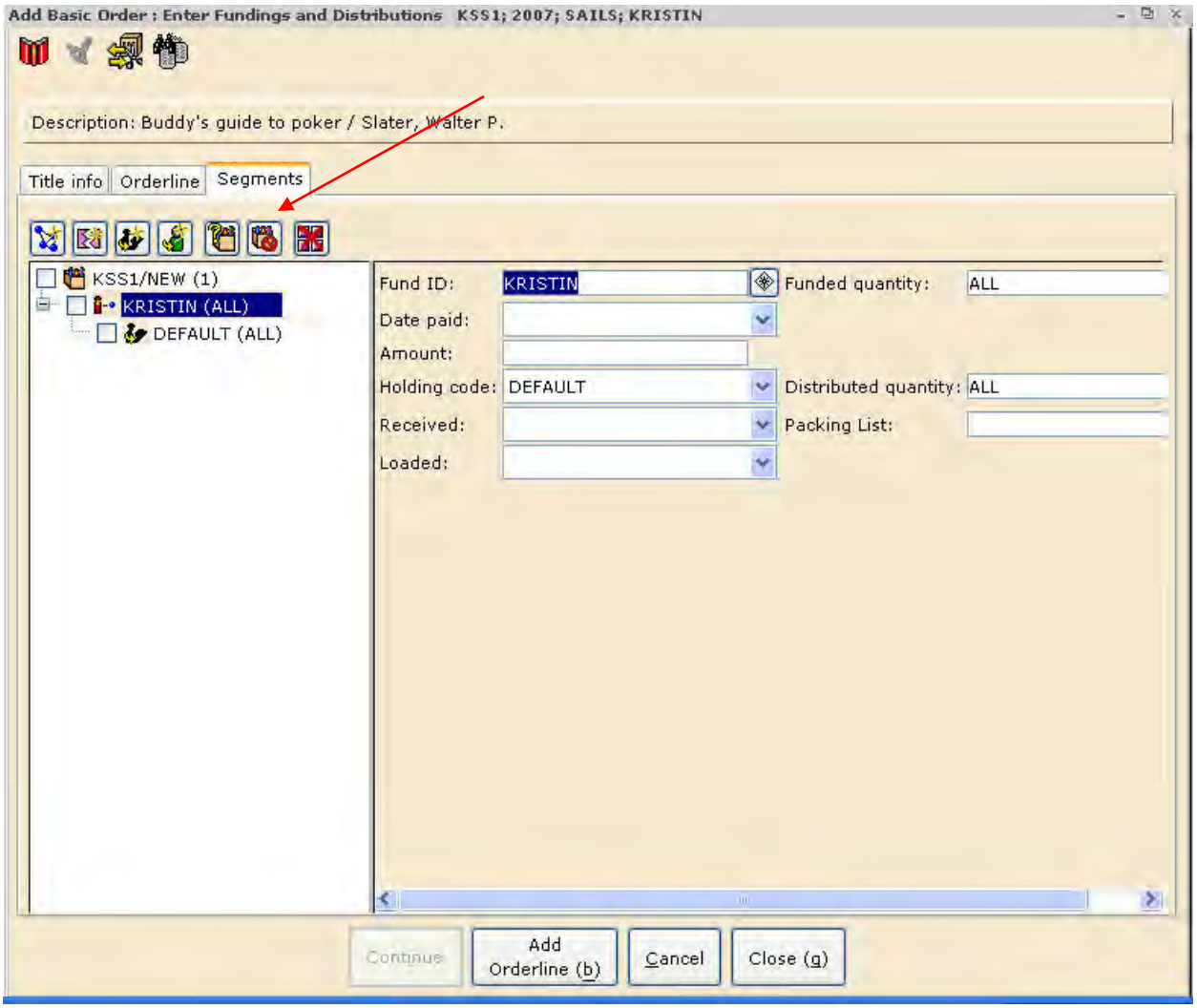

14. Enter the Unit price and quantity. They are the only required fields.

15. If you wish to view the Bibliographic record, click on the Title Info tab.



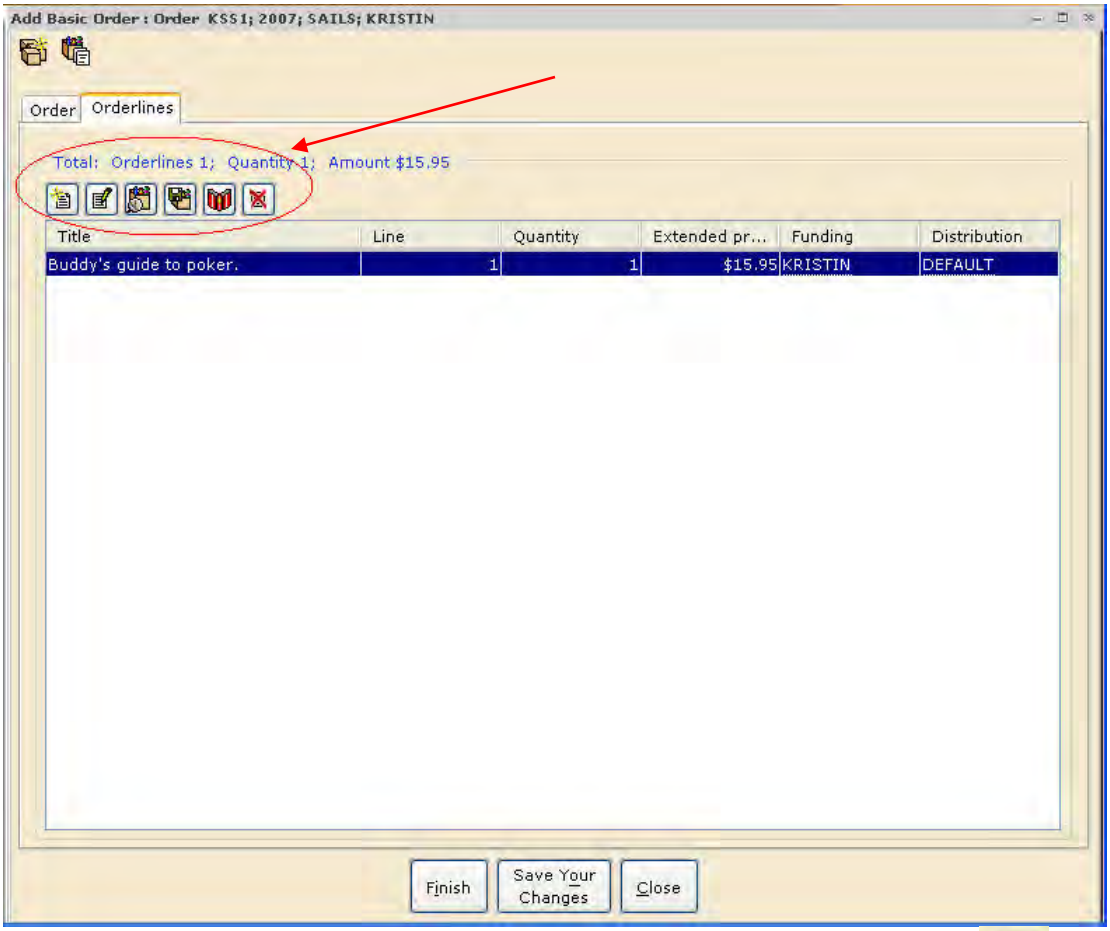

16. Click on the Orderline Tab to go back to Orderline information or Click Continue.

17. Click **Continue**. The Segments Tab will open.




18. The Funding and Distribution will display. The defaults set for the Fund ID and Holding Code will be used. You can add, modify, or delete funding and distributions using the ***Segments tools***.

19. Click **Add Orderline**. The order summary screen will open.

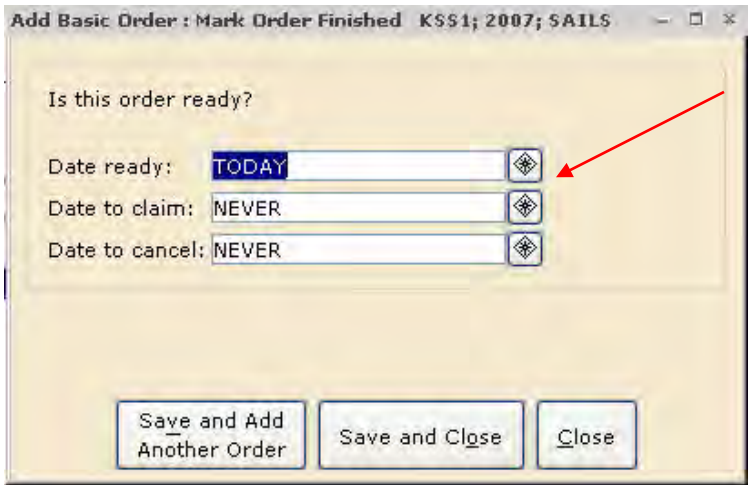



20. To add another orderline, use the ***Add New Orderline tool***.  .

21. Then follow the same steps from the first orderline.

22. If you are planning on adding more to this order at another time, click **Save Your Changes.**

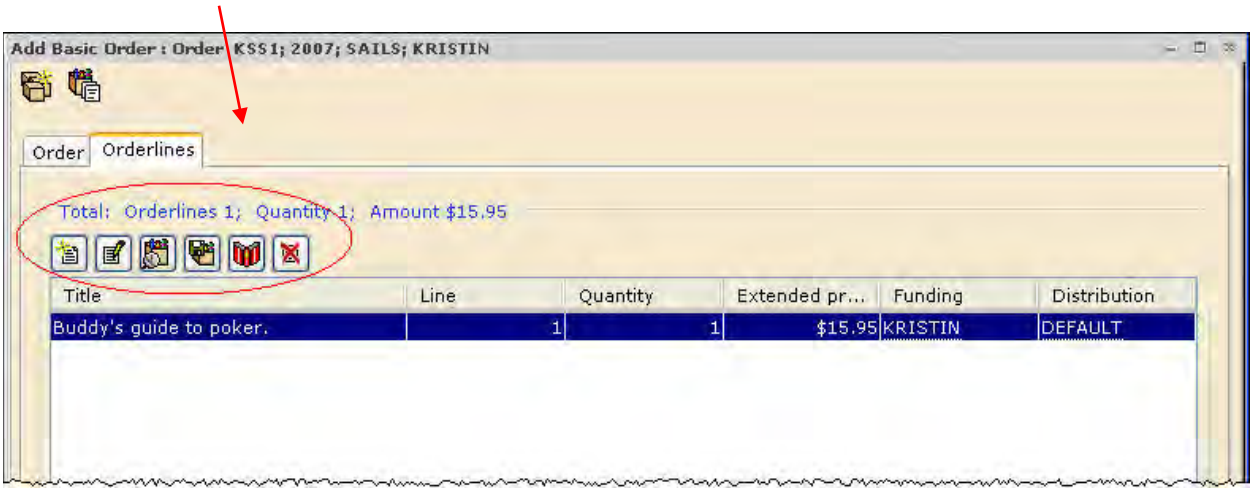
23. If you have completed the order, click **Finish.** The Mark Order Finished window will open. You are prompted to enter a Date Ready, Date to Claim, and Date to Cancel. Click on the gadget in each field to change the Dates.




# Tools

Tools are a new feature in this client. These tools change when you are working in certain areas of Acquisitions.

## Orderline Tab Tools




### Add New Orderline 

This tool will allow you to add a new orderline to the order you are currently working on.

### Modify Orderline 

Use this tool to modify a selected orderline. You can change the information in the Orderline Tab and the Segments tab.

### Display Orderline 

Use this tool to display a selected orderline. You can view the following tabs: Order, Orderline, Segments, Invoices, Order History, and Serial Control.

### Save Orderline to file

Click on this to save a specific orderline to a file on your workstation. The data will be output in a comma-delimited format and saves the data to a .csv extension. You can view this field using a spreadsheet program.

### Display Bibliographic Description

Click on this to view the bibliographic information about the selected orderline. Title, Call/Copy information, and Order information will display.

### Delete Orderline

Use this tool to delete a selected orderline.

1. Select an orderline and click on the Delete Orderline tool.
2. The Remove orderline window will open to the Orderline Tab. Review the information in the Orderline tab and the Segments tab.
3. If this is the orderline you wish to remove, click Remove This Orderline.
4. The confirmation window will open with the message: Delete this orderline? Click OK to remove this Orderline or click Cancel.

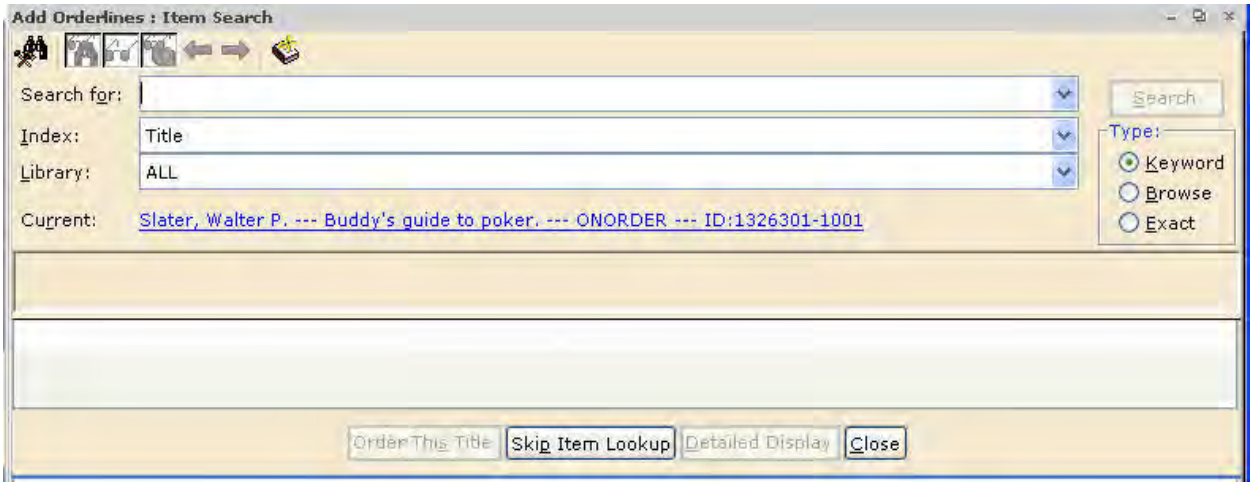
# Add Orderlines Wizard


Use this wizard to Add Orderlines to an existing order. The Modify Order wizard does not allow you to add orderlines.

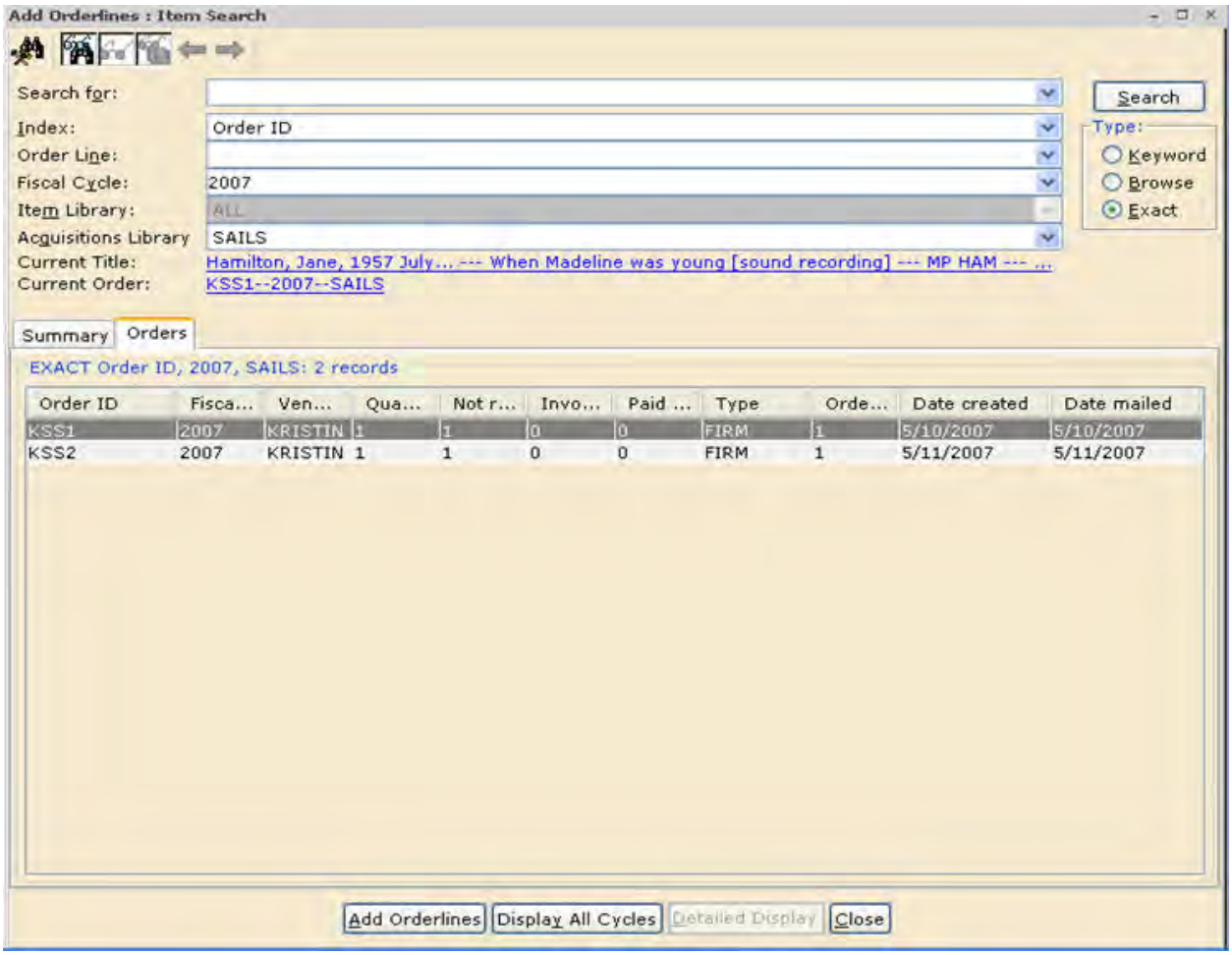
1. Click on the **Add Orderlines wizard**. The Add Orderlines Item search window will open.

   Search by Order ID, Packing List, Requisition Number, or any of the other search options available in the Item Search and Display wizard.

2. If you enter a specific Order ID, the Add Orderlines Item search window will open.

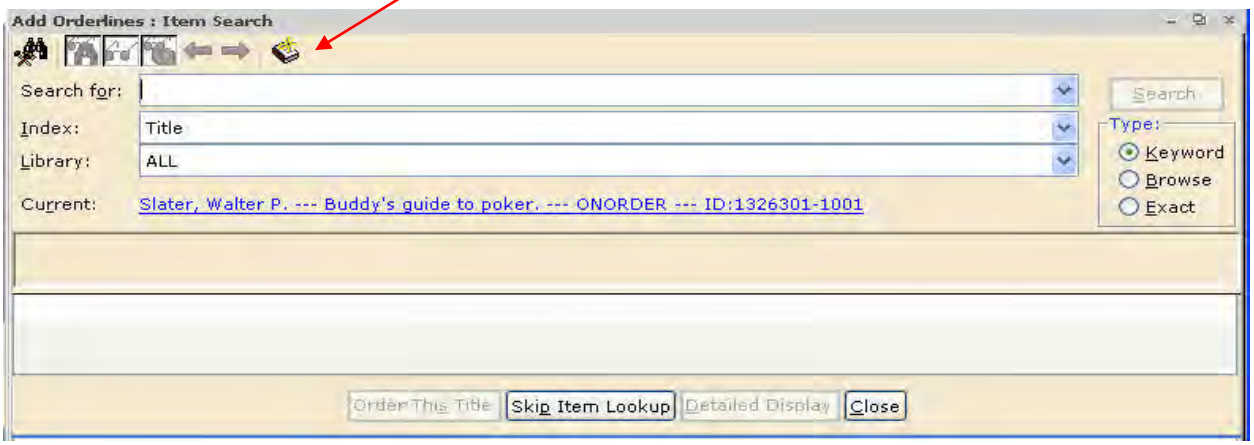



Search results leaving the Search field blank.

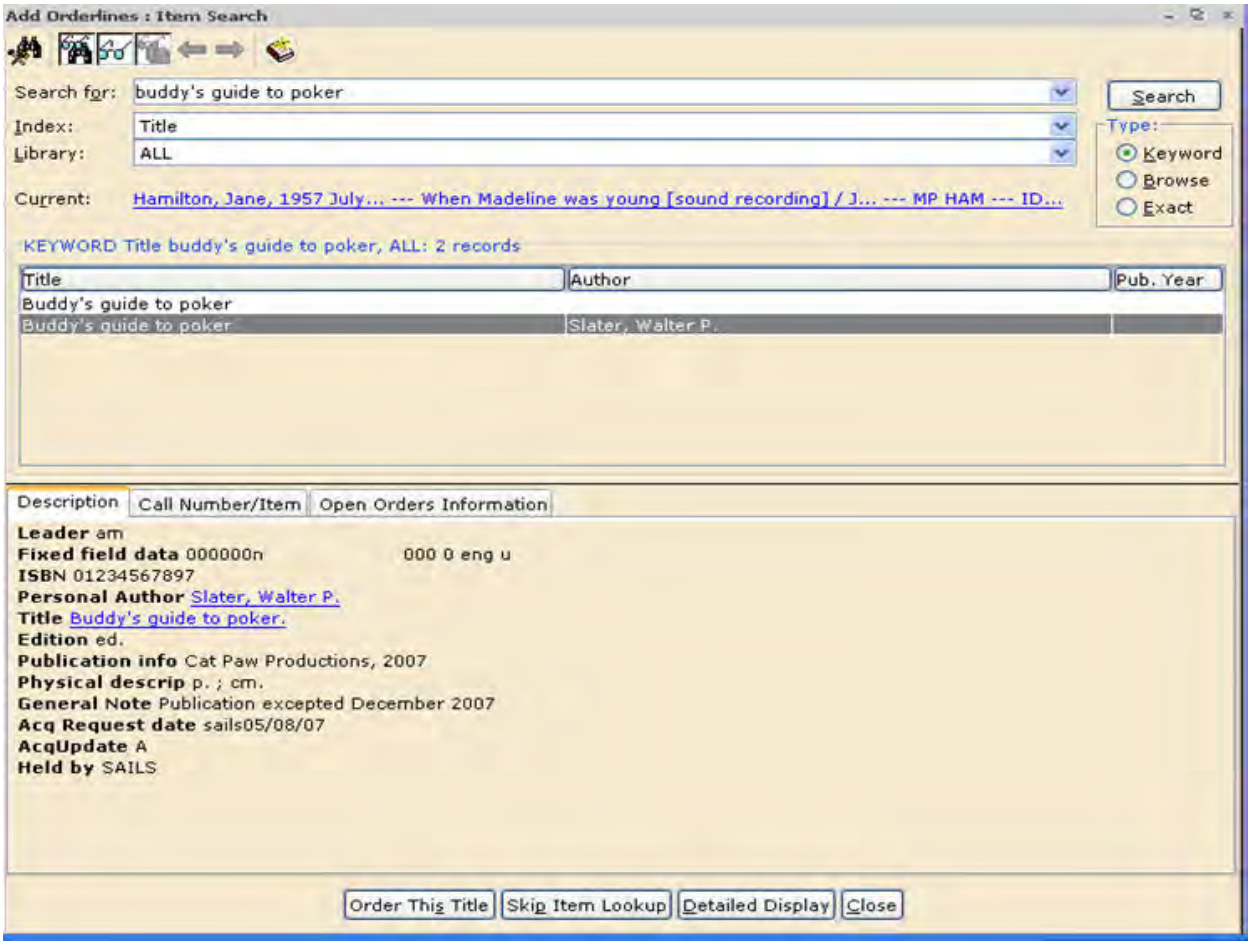



3. To add an orderline to an order from the Orders summary screen. Highlight the order you wish to add too and then click **Add Orderlines**.

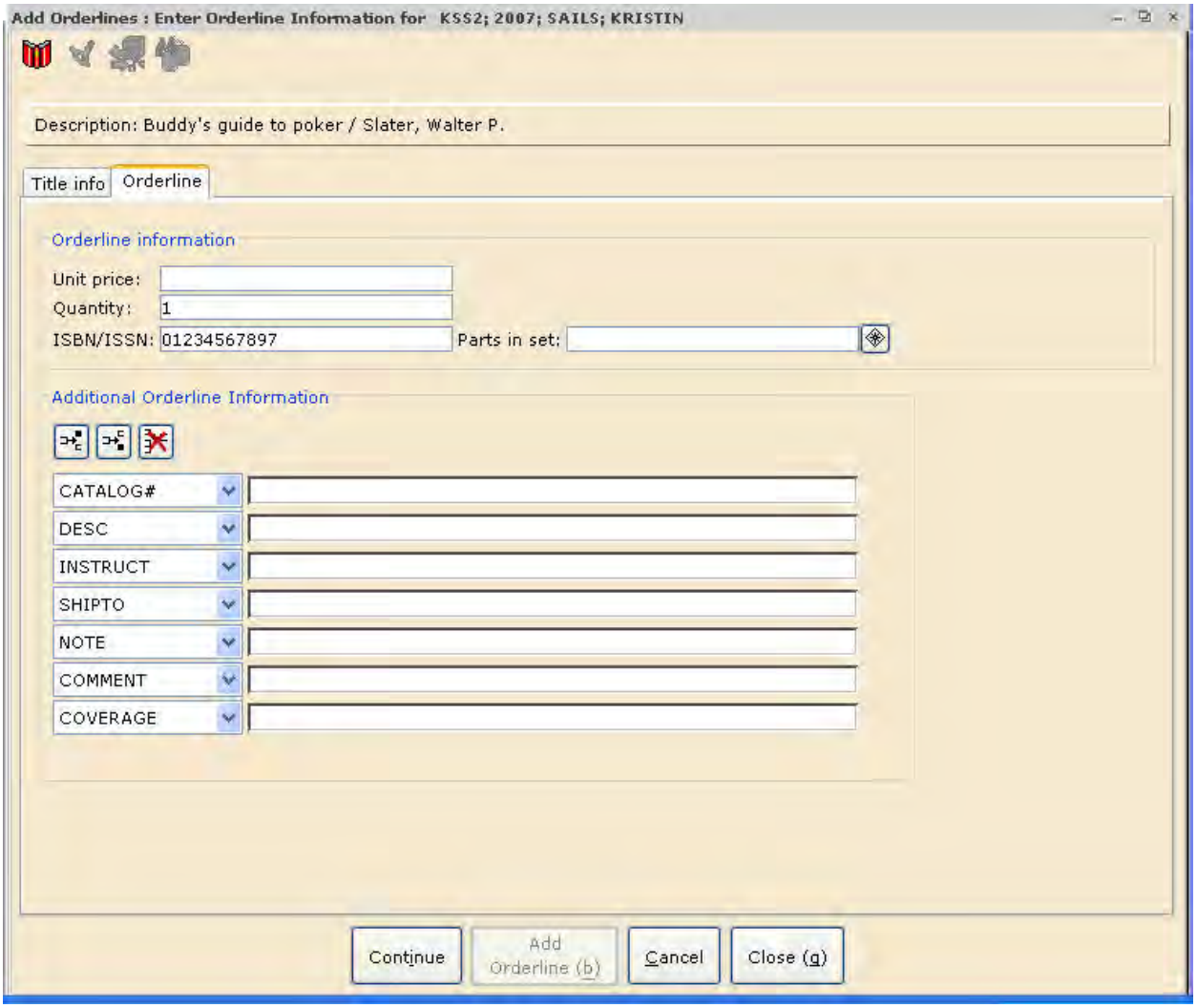
4. The Add Orderlines Item search window will open.




5. Search for the title you want to order. If the title is not in the catalog, click the ***Add Temporary Title helper*** to create the ACQ record.



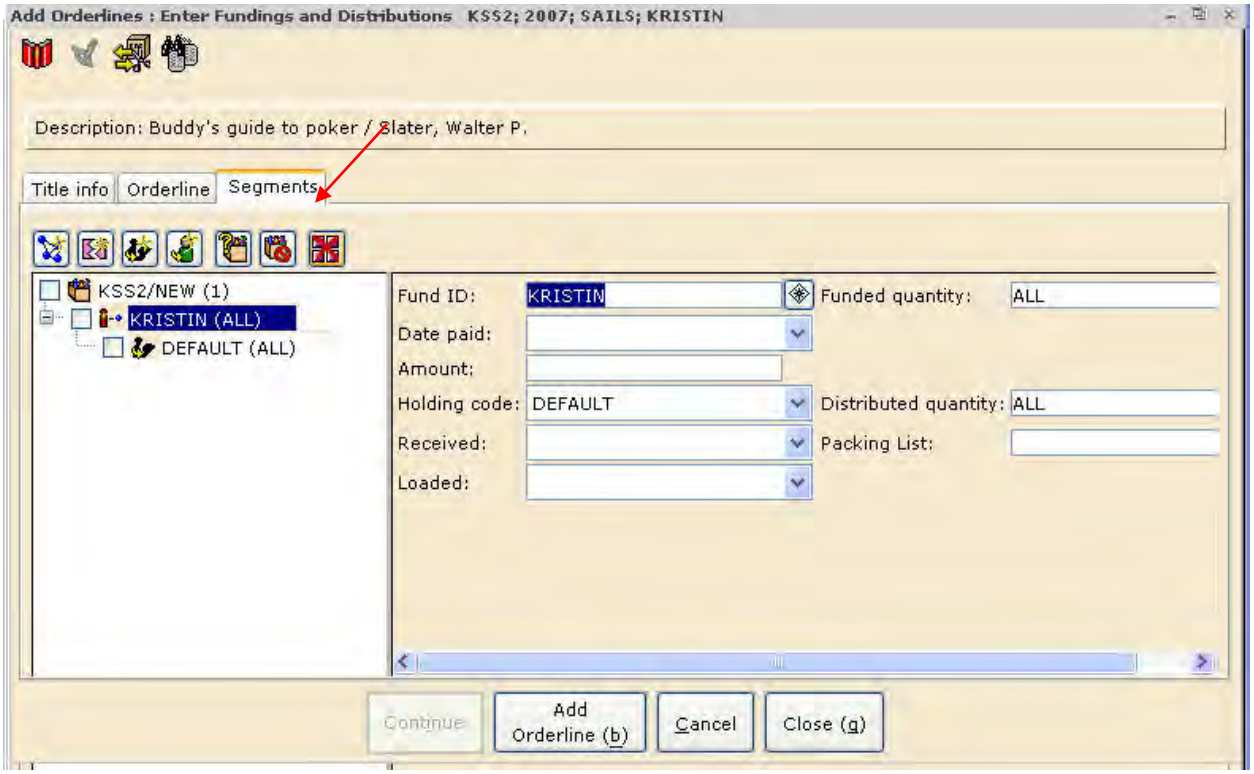

6. Click **Order This Title**. The Enter Orderline Information window will open and display the Title Info and Orderline tabs.




7. Enter the ***Unit price and Quantity***. They are the only required fields.

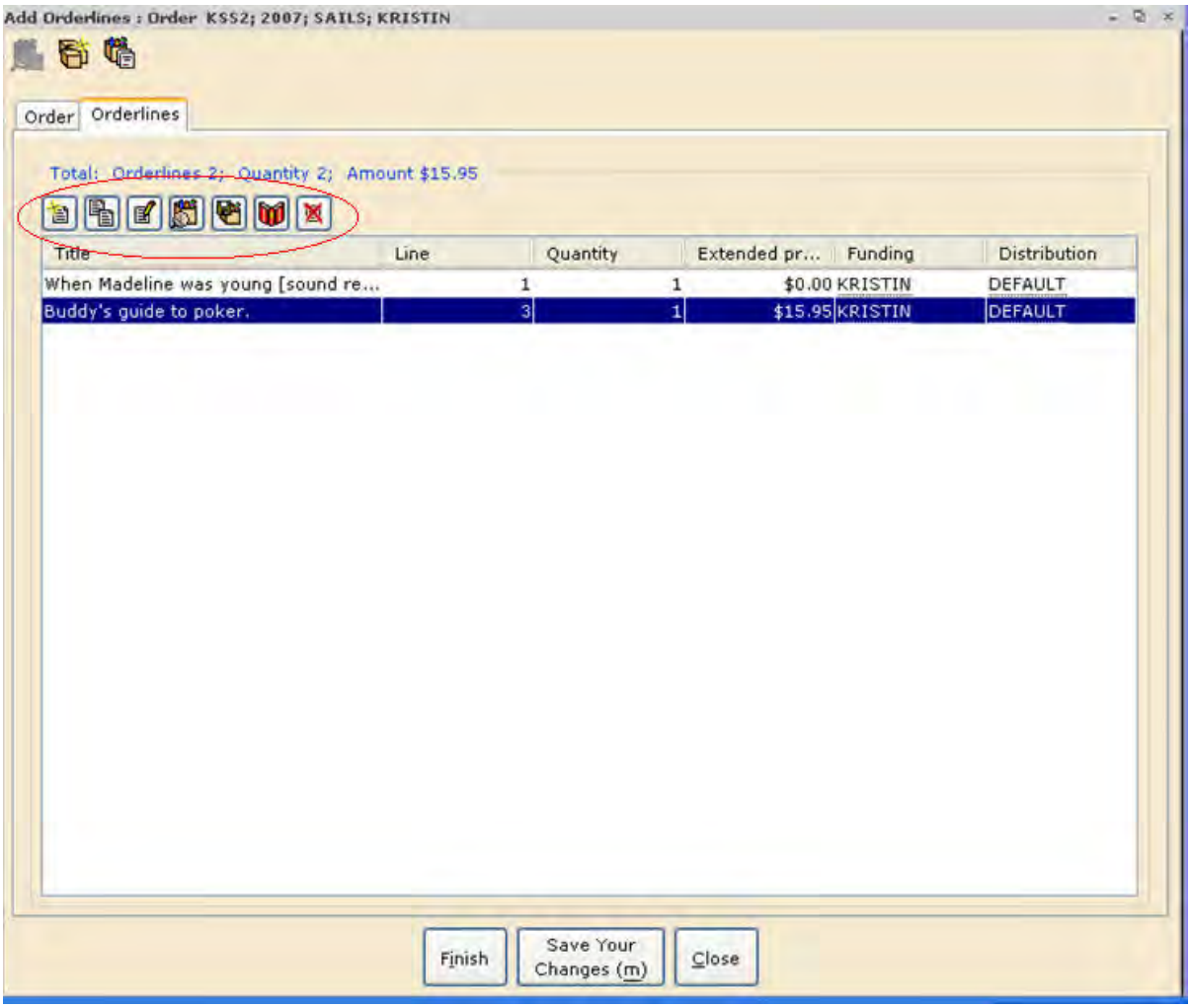
8. If you wish to view the Bibliographic record, click on the **Title Info** tab.

9. Click **Continue** and the Segments tab will open.




10. The Funding and Distribution will display. The defaults set for the Fund ID and Holding code will be used. You can add, modify, or delete funding and distributions using the ***Segment tools.***

11. Click **Add Orderline**. The order summary screen will open.




12. To add another orderline, use the ***Add New Orderline*** tool.

13. Then follow the above steps to add the new orderline.

14. If you want to add more orderlines at another time, click **Save Your Changes**.

15. If you have completed the order, click **Finish**. The Mark Order Finished window will open. You are prompted to enter a Date Ready, Date to Claim, and Date to Cancel.


16. Click **Save and Add Orderline to Another Order** if you want to work on another order.

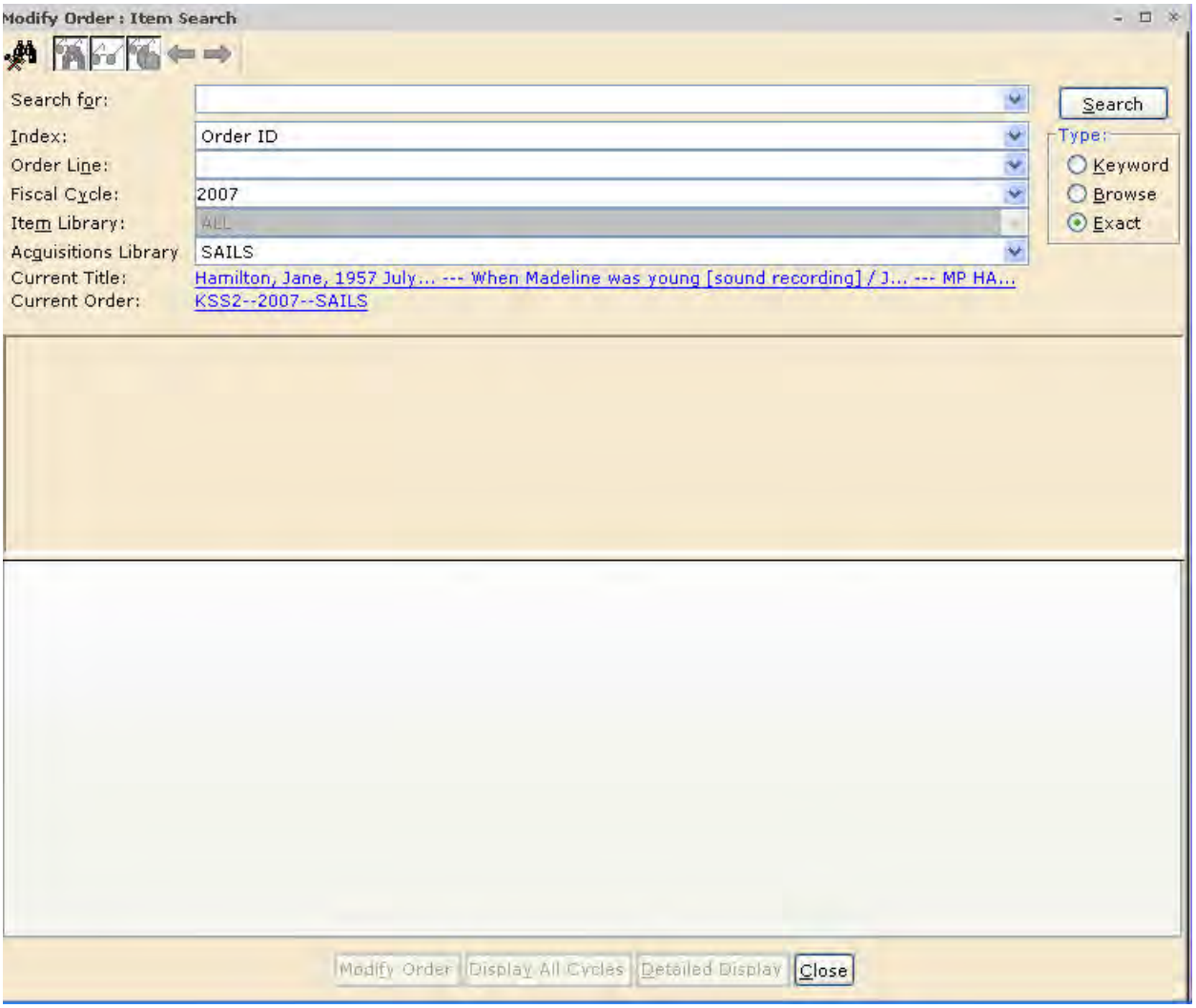
17. Click **Save and Close** if you are finished with the current order and want to exit from this wizard.

18. Click **Close** to exit out of the wizard without saving your changes.

# Modify Order Wizard


The Modify Order wizard allows you to modify the Order information and Orderlines information.

1. Click on the **Modify Order wizard**. The Order search window will open.

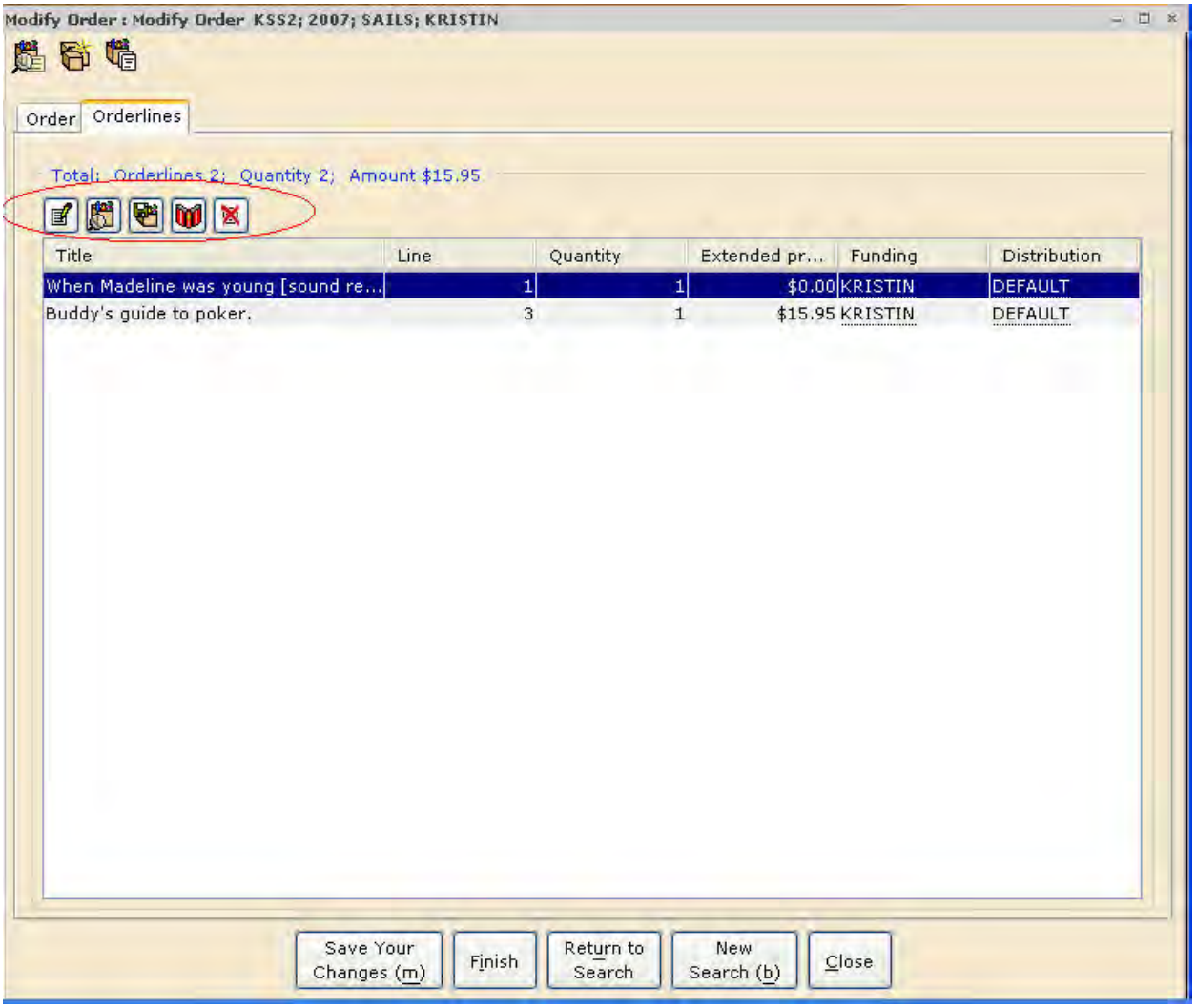



2. Search for the Order you wish to modify.

If you search for the order using any of the bibliographic searches (Title, General, or Title Control Number), you will have to select the title if more than one title appears in the list. Any order that is attached to this title will appear.

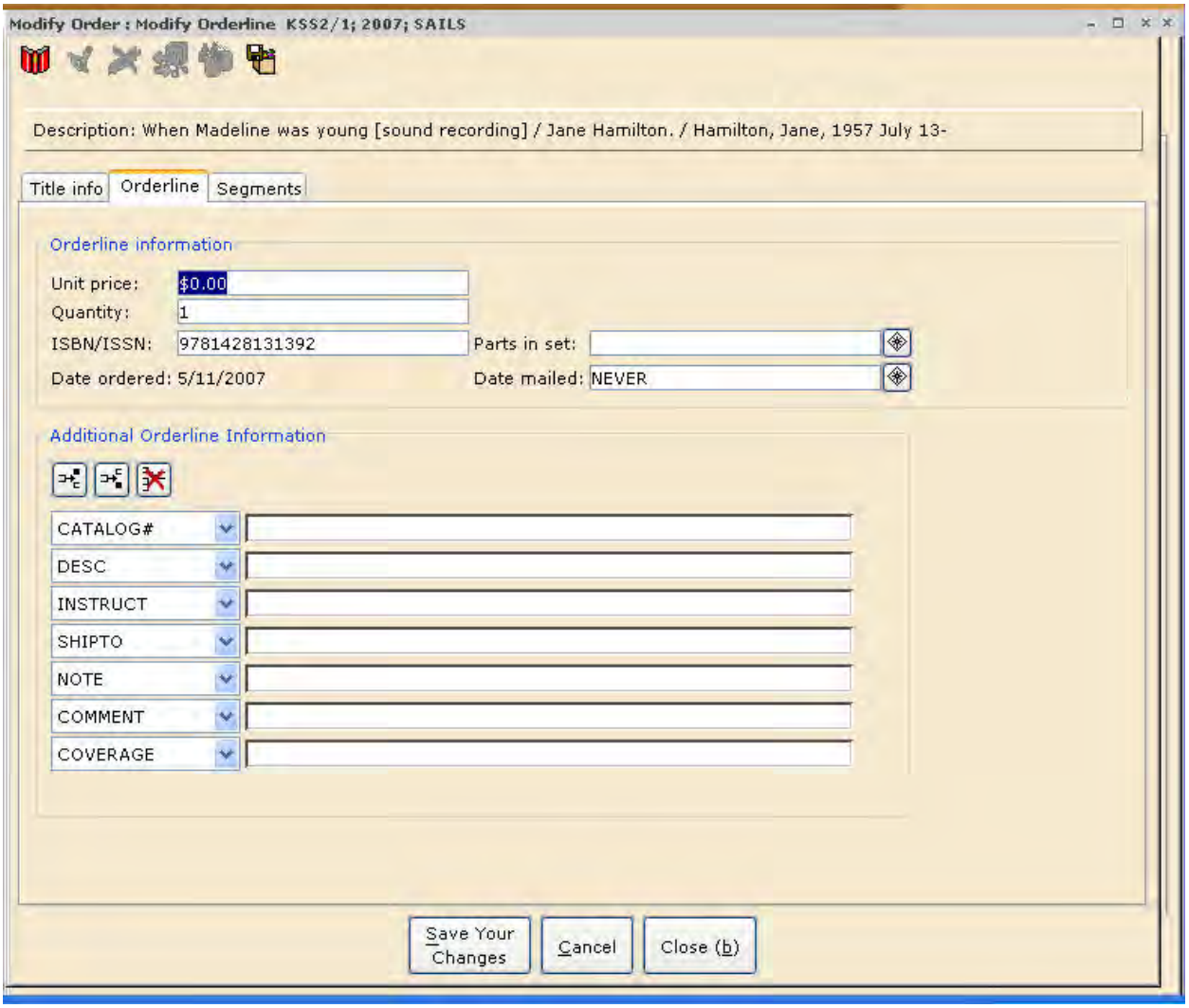
If you search by Order information and any of the order matches, the list will display. Highlight the order you wish to modify.

3. Click **Modify Order**. The Modify Order window will open.



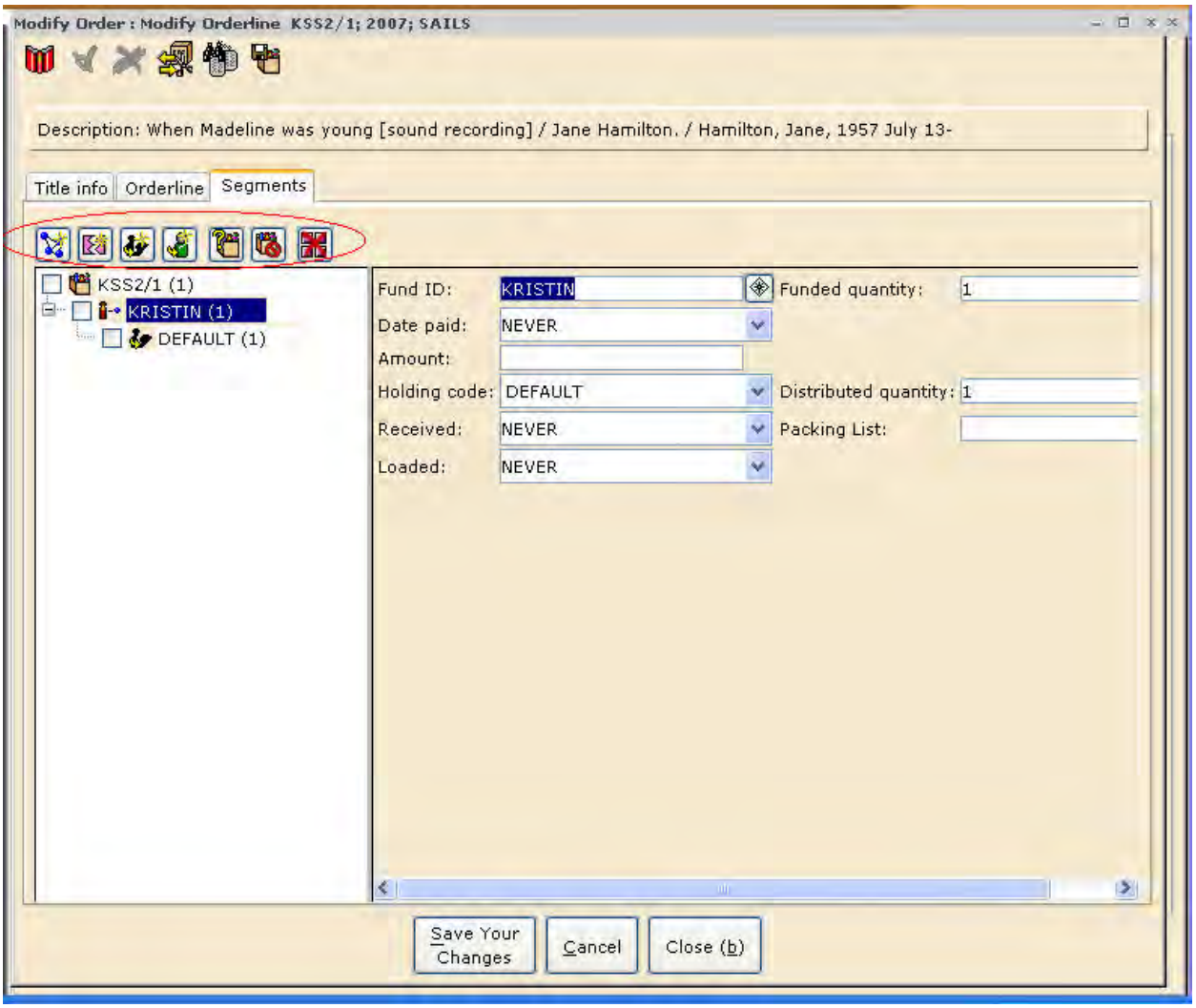

4. Highlight the Orderline you wish to Modify. Click on the ***Modify Orderline tool***.

5. The Orderline information tab will open.



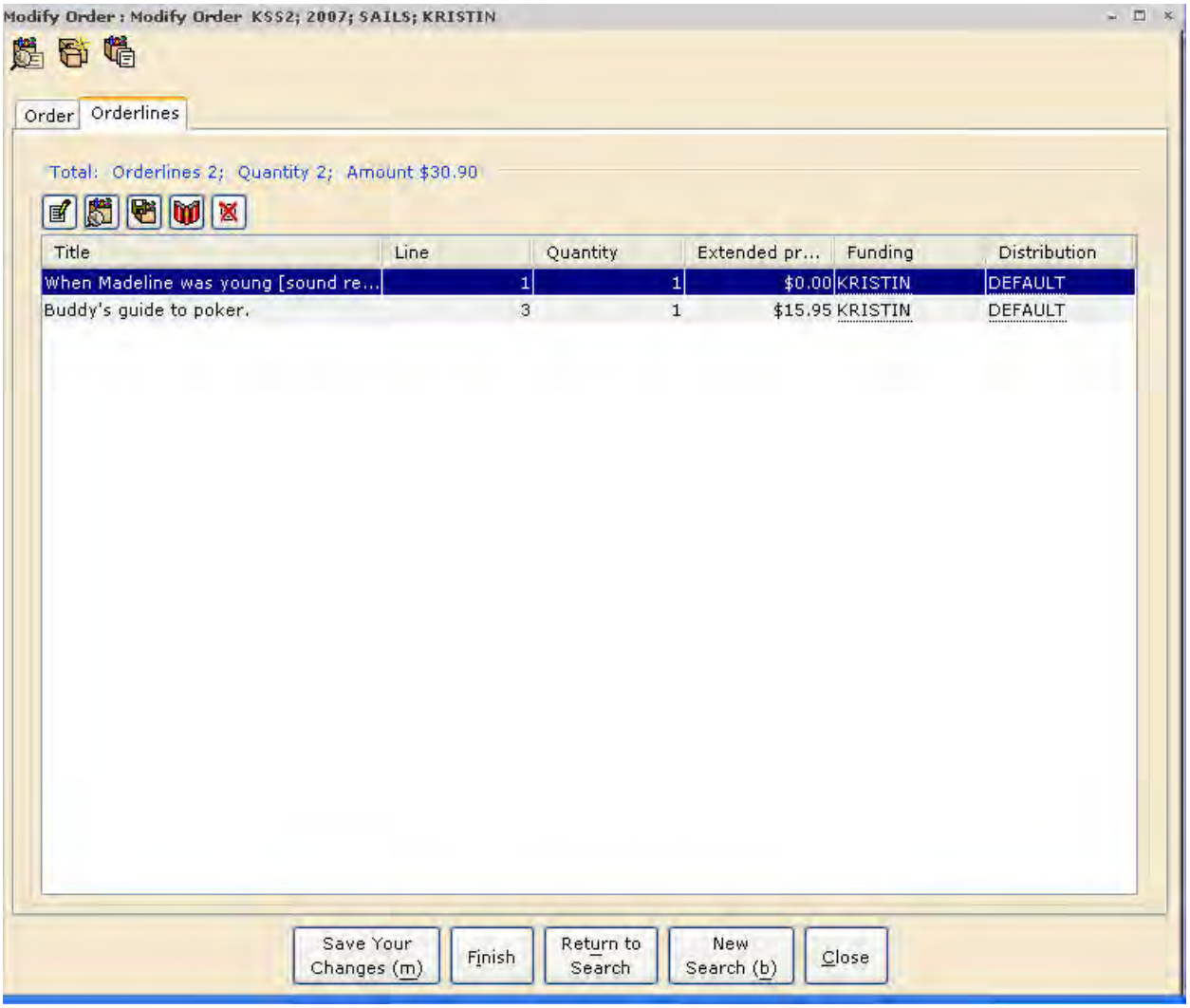

6. Click on the field that you wish to modify. If the orderline tab is the only information you need to update, click Save Your Changes.

7. Click on the **Segments tab** to modify the distribution information for this orderline.



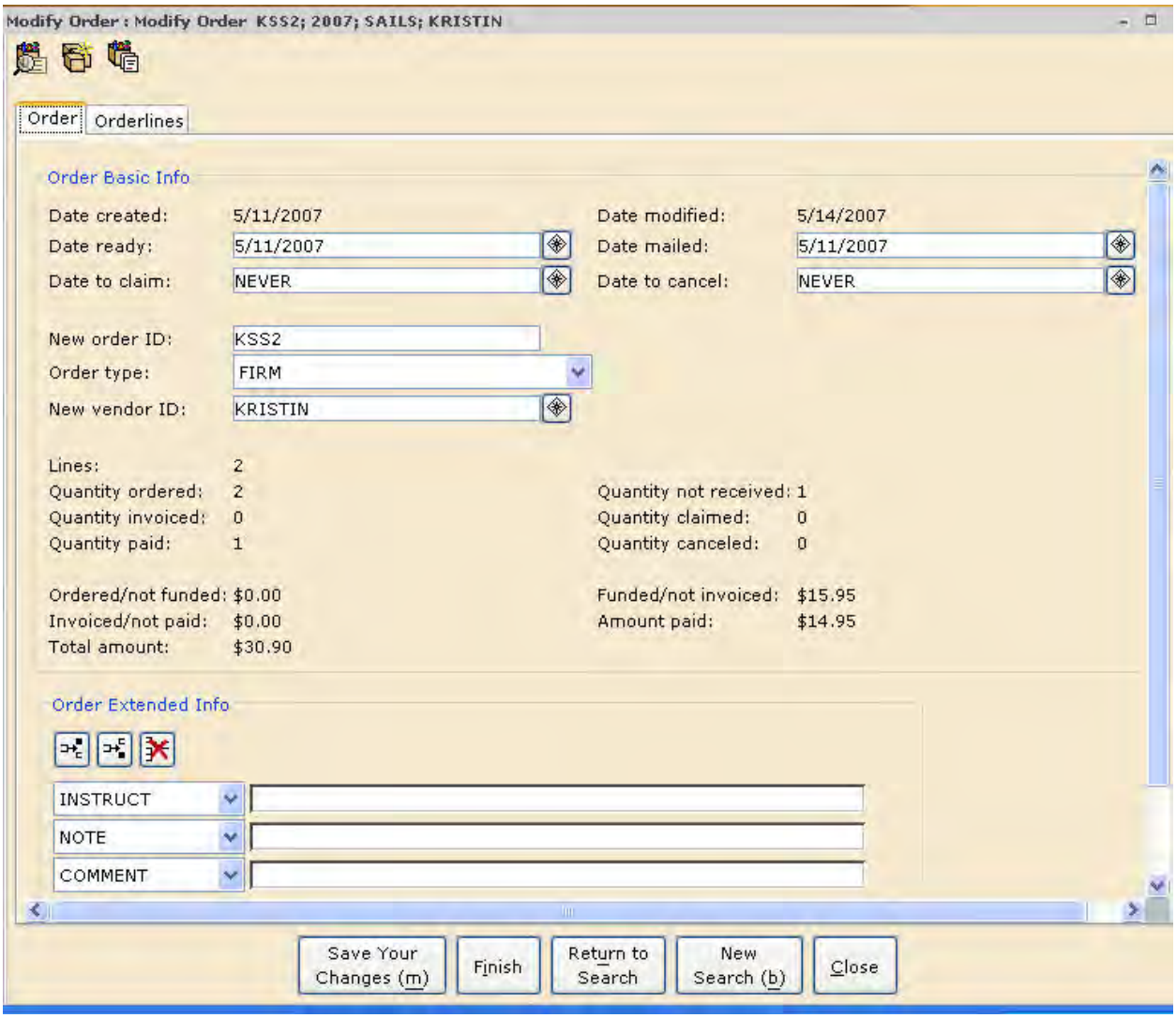

8. Use the *Segment tools* to add a **Funding Distribution, Add a Claim, or Add a Cancellation and etc.**

9. Click **Save Your Changes, Cancel, or Close** to return to the Orderlines Summary Screen.




10. To view the order information, click the **Order Tab**.

    The Order tab displays all of the information about the order. Only a few of the fields can be edited. Most fields cannot be modified.




1. The date fields that can be edited:
   **Date ready**
   **Date mailed**
   **Date to claim**
   **Date to cancel**

2. Click on the gadget in the date field you wish to modify to select a date.

3. The order information fields that can be edited are **New Order ID, Order type, and New Vendor ID.**

4. To edit the **New Order ID**, click on this field and type in a new ID.

5. To edit the **Order type**, click on the down arrow to select from the drop-down list.

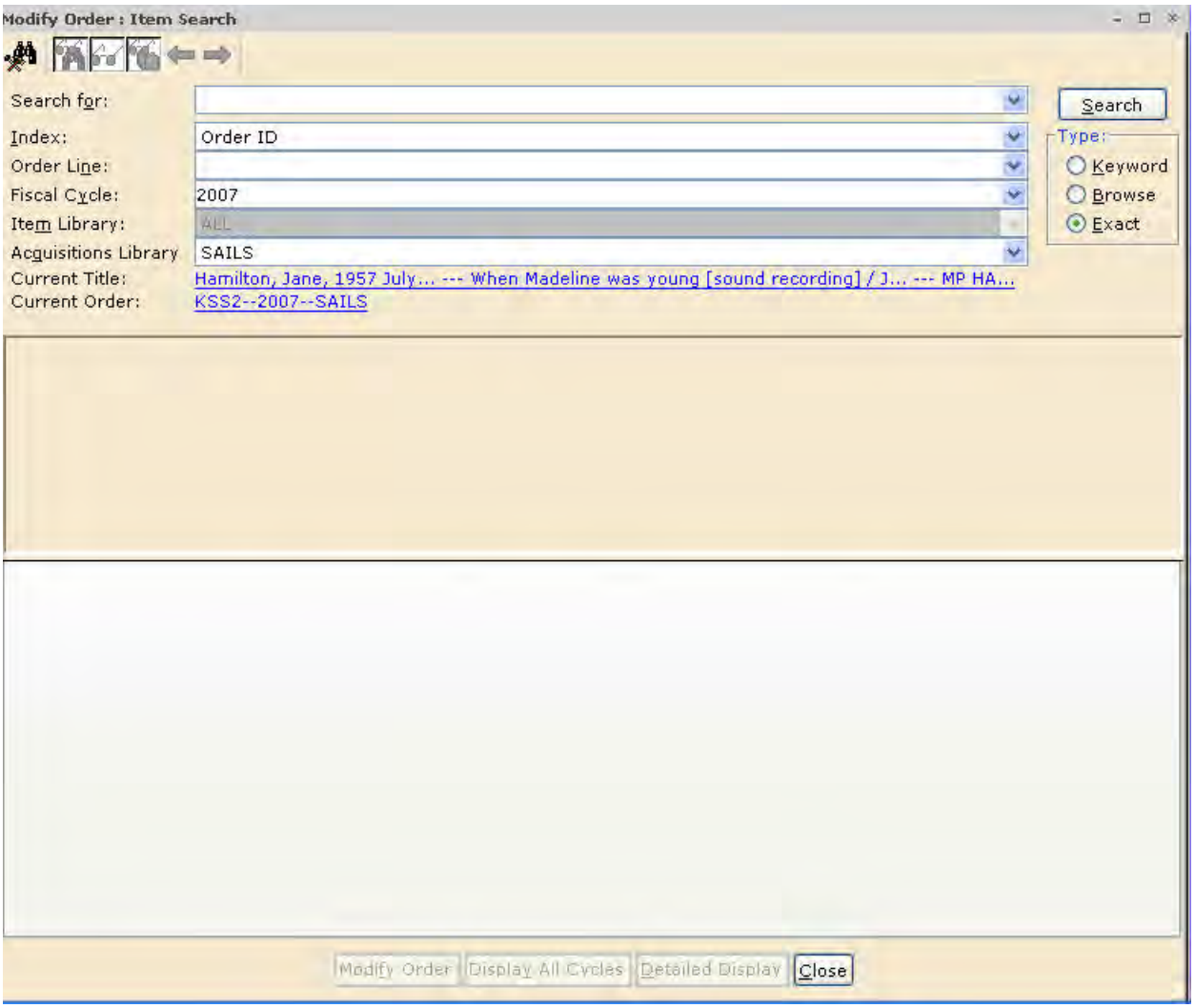
6. To edit the **New Vendor ID**, click on the gadget to select from the Vendor list.

7. Click **Save Your Changes.**

# Modify Order Wizard to Receive and Pay for Orderlines

1. Search for the Order or the Title you wish to Receive and Pay.

2. Click on the **Modify Order wizard**. The Order search window will open.

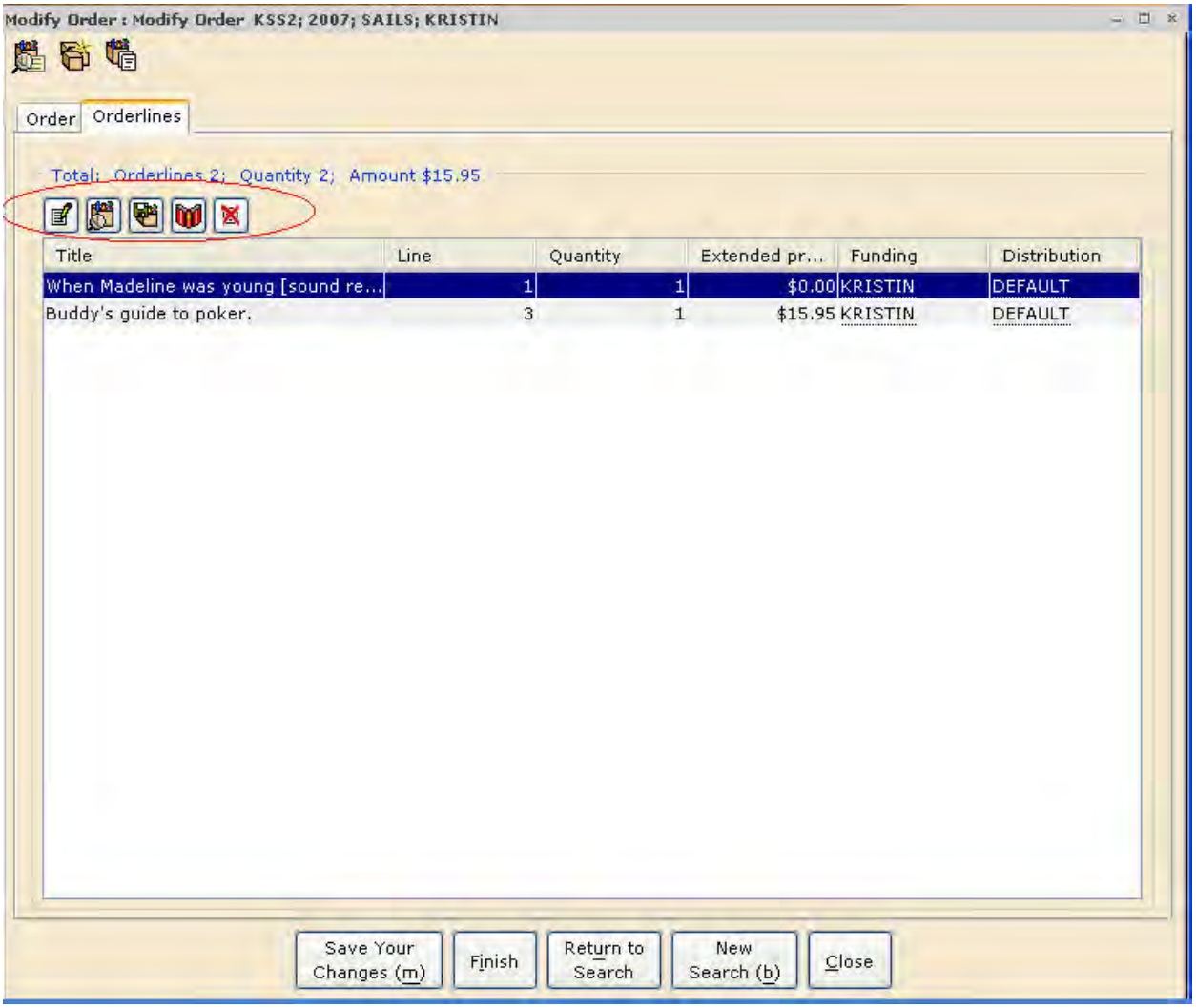



3. Search for the Order you wish to modify.

If you search for the order using any of the bibliographic searches (Title, General, or Title Control Number), you will have to select the title if more than one title appears in the list. Any order that is attached to this title will appear.

If you search by Order information and any of order matches, then the list will display. Highlight the order you wish to modify.

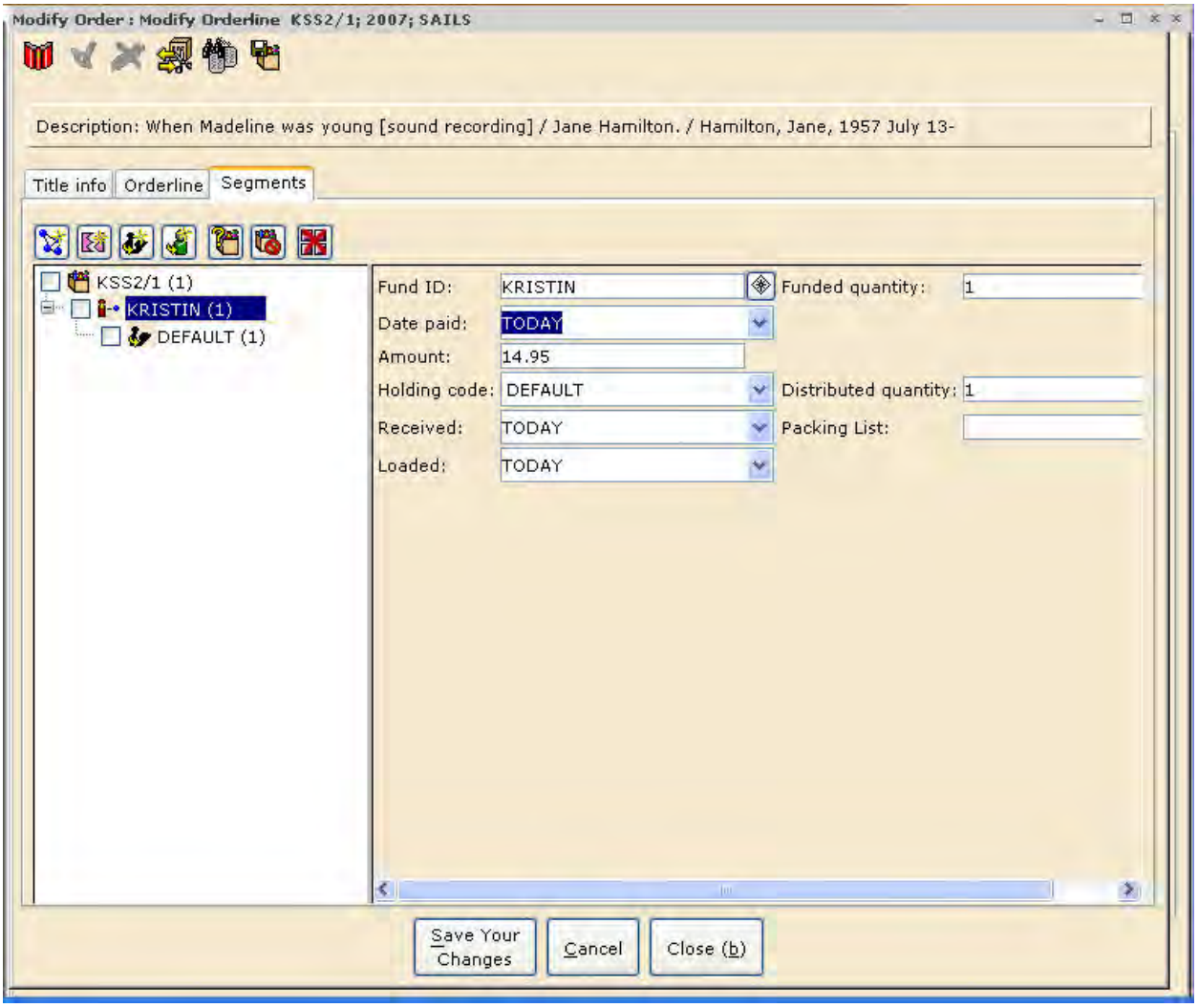
4. Click **Modify Order**. The Modify Order window will open.




1. Highlight the Orderline you wish to Modify. Click on the ***Modify Orderline tool***.

2. The Orderline information tab will open.

3. Click on the **Segments Tab**.




4. Click on the ***Date paid*** field. Using the drop-down list choose Today or type in a date in the mm/dd/yyyy format (for example: 05/14/2007).

5. Click on the ***Amount field*** enter the amount paid.

6. Click on the ***Received field***. Use the drop-down list to select Today or type in the same format as Date Paid.

7. Click on the ***Loaded field***. Follow the same procedure as the Received field. **(A DATE MUST BE IN THIS FIELD OR THE ORDER WILL REMAIN OPEN FOREVER.)**

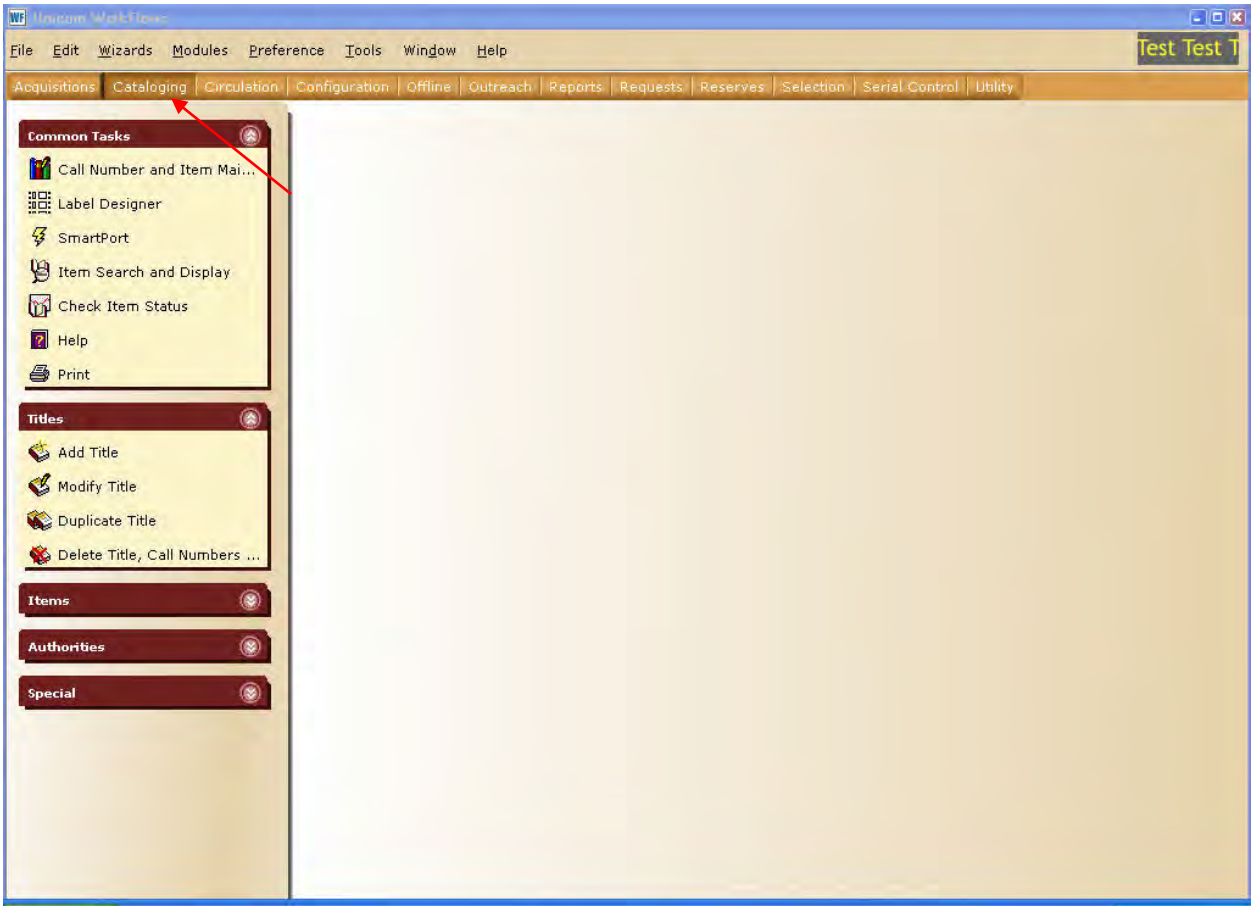
8. Click **Save Your Changes**. You will be returned to the Orderline tab.

9. If you have completed modifying this order, choose one of the following: **Return to Search, New Search, or Close.**

# Modifying Records After You Have Received Them

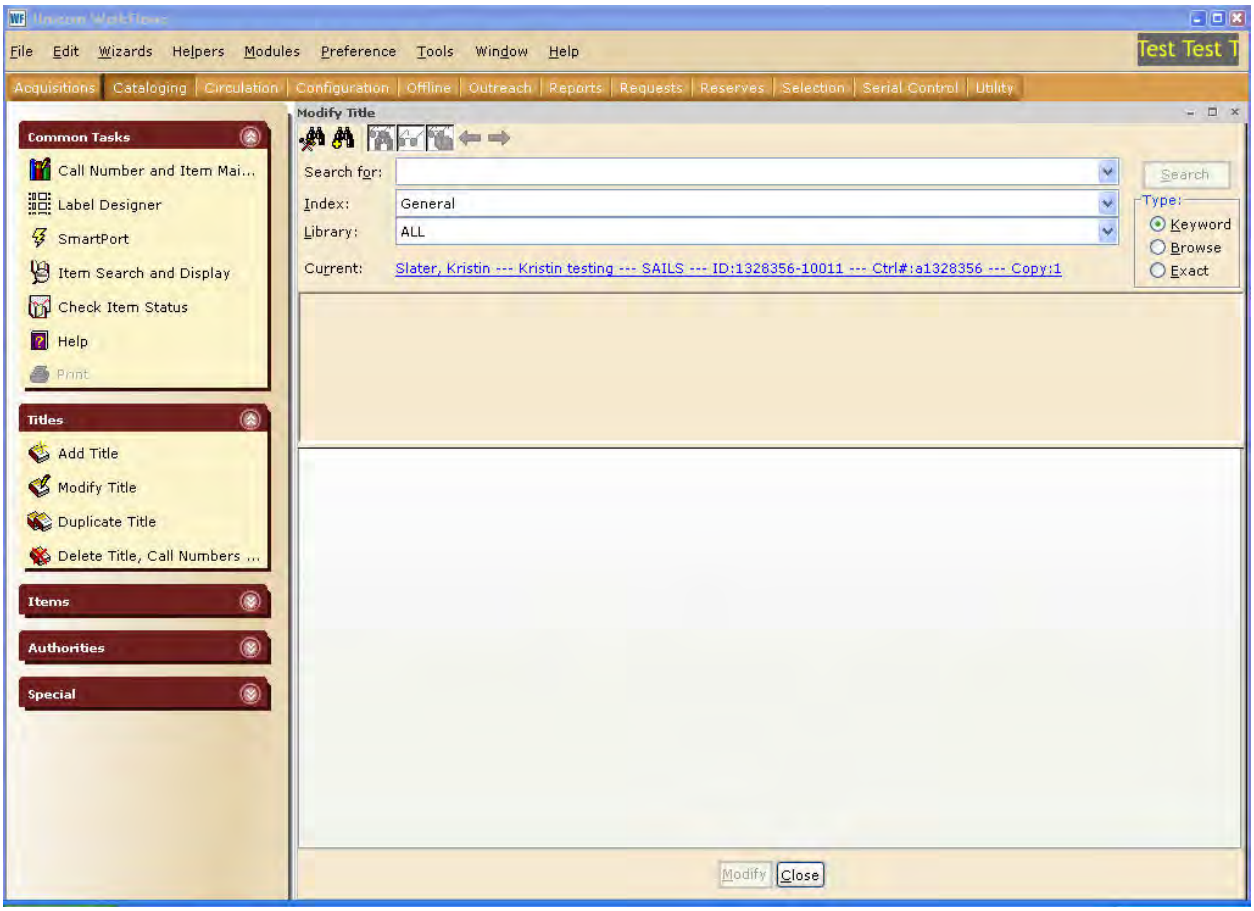
You will need to change to the Cataloging Toolbar.

1. Click on **Cataloging**. The Cataloging Toolbar will open.

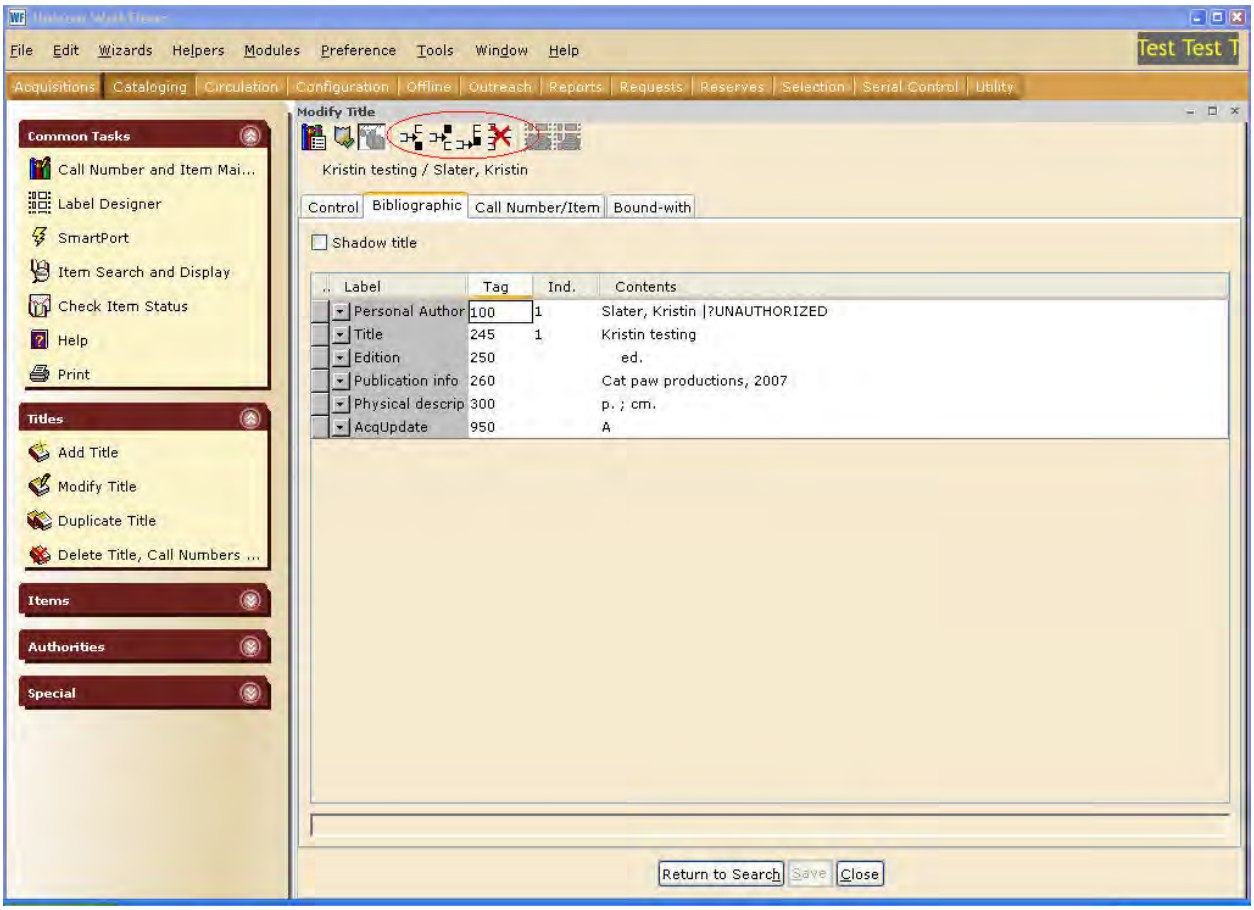



The Modify Title wizard is in the Title group of wizards.

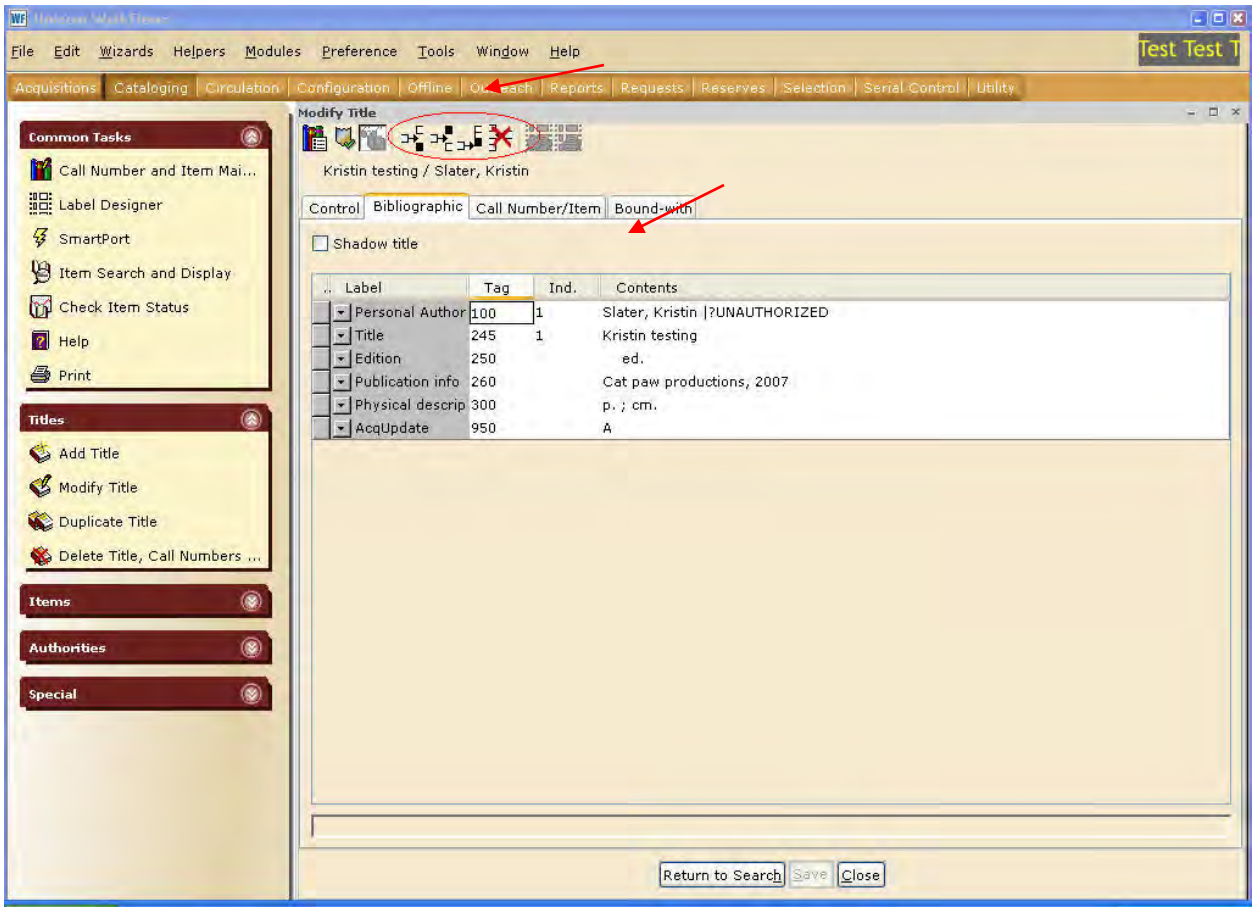
Click on Modify Title. The Modify Title search window will open.




1. Search for the ACQ record that needs updating.




2. The record will open to the Bibliographic information tab. If you need to update the bibliographic record, you can do so at this point.




1. Click on the field you need to modify. You want to do all of the editing for the record in the **Contents column**. Click on the ***Contents field*** or use the Tab key. Enter the missing information.

   If you need to add more fields to the record, you need to the use the ***Add field helpers***.

# Adding Fields

## Add Before 

To add a field before the current one, do the following:

- Select the field immediately below where you want to add the new field, then click the **Before** helper.

  Or, right-click to open the shortcut menu, then click **Add Field Before**.

- Type the field you want to add.

## Add After 

To add a field after the current one, do the following:

- Select the field immediately above where you want to add the new field, then click the **After** helper.

  Or, right-click to open the shortcut menu, then click **Add Field After**.

- Type the field you want to add.

## Deleting Fields 

To delete a field, do the following:

- Select the field you wish to delete and then click the **Delete** Helper.

  Or, right-click to open the shortcut menu, and then click **Delete Field**.

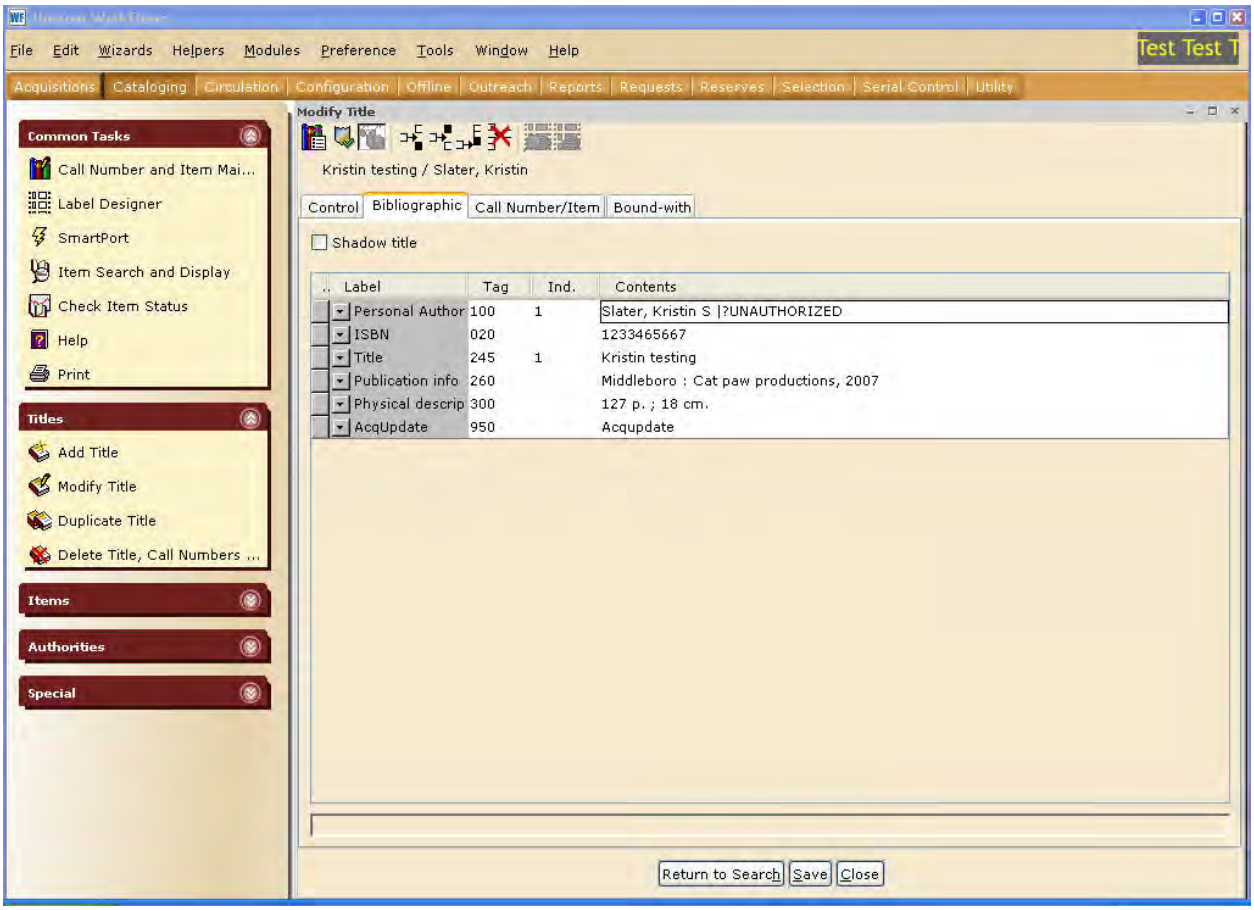
## Appending Fields 

In addition to adding fields, you can also append a field to a record. When you append a field to a record, Unicorn adds the new field at the end of the record.

- Position the insertion point anywhere in the Editor window, then click the **Append Field** helper.

  Or, right-click anywhere in the Editor window to open the shortcut menu, then click **Append Field**.

- Type the field you want to add. Unicorn adds the new field at the end of the record.




2. Once you have finished editing the record, click **Save.**

3. Click on the Call Number/Copy Tab.

4. The Copy information screen will open.