

Printing a List of Items Selected

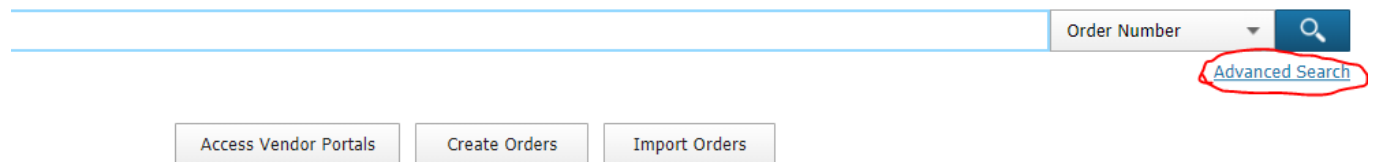
If you want to print a list of items that you have selected for purchase through a WCTS Selection List so that patrons can place the items on hold, first understand that there's no way to print from the Selection List itself, and that you wouldn't want to give a patron a list of items on the Selection List. That's because items on the Selection List may not exist in the library catalog yet; a patron might search for a title, but because the title record doesn't exist, they wouldn't be able to place a hold.

After the Selection List is closed, and the items officially ordered, WCTS creates short records for the titles not already in the catalog, so that holds can be placed on them.

With the Selection List closed, you can see all titles you have selected on the "Orders" screen; these are things that have been purchased for your library, and that will then exist in the catalog for patrons to place holds on.

Viewing the items that you have purchased can be done by using the Advanced Search from the Order screen:

Welcome to BLUEcloud Acquisitions Ordering



On the Advanced Ordering window, in the "Distribution Institution" field, select your library:

Statuses

- Building
- Pending Approval
- Denied
- Approved
- On Order
- Complete

Order Details

Vendor	Fund Account
<input type="text"/>	<input type="text"/>
Distribution Institution	Fiscal Cycle
Berlin Public Library	<input type="text"/>
Fund Category	Order Source
<input type="text"/>	<input type="text"/>
Selection List	Selection List Type
<input type="text"/>	<input type="text"/>
Created On or After	Created On or Before
<input type="text"/>	<input type="text"/>
Last Modified On or After	Last Modified On or Before
<input type="text"/>	<input type="text"/>

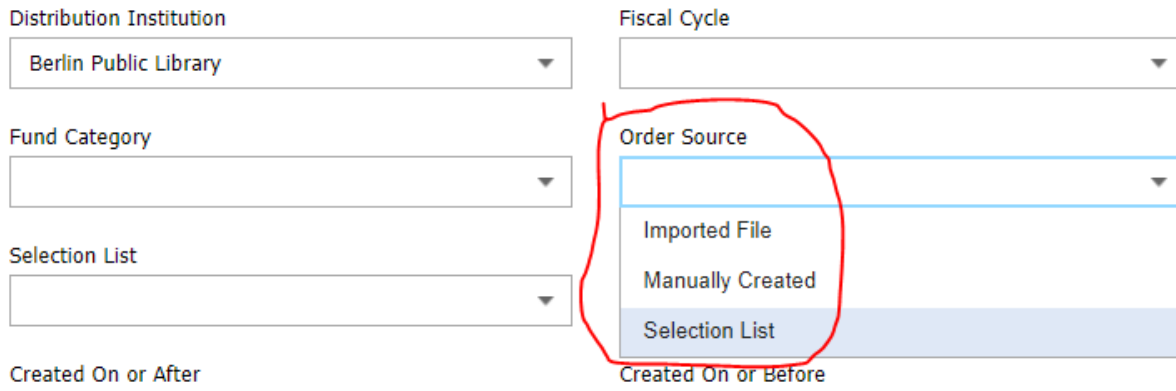
If you want only the items ordered off of a particular Selection List, or specific set of Selection Lists, use the "Selection List" dropdown to choose which List(s) you want to print your selections from.

Order Details

Vendor	Fund Account
<input type="text"/>	<input type="text"/>
Distribution Institution	Fiscal Cycle
Berlin Public Library	<input type="text"/>
Fund Category	Order Source
<input type="text"/>	<input type="text"/>
Selection List	Selection List Type
Favorite Author List - February 1st	<input type="text"/>
Created On or After	Created On or Before
<input type="text"/>	<input type="text"/>
Last Modified On or After	Last Modified On or Before
<input type="text"/>	<input type="text"/>

More than one Selection List can be chosen from the dropdown; use the small arrow on the right on the right of the search field to close the dropdown box.

If you are selecting many Selection Lists, another way to select all items off of the Selection Lists (instead of selecting each one individually) is to use the “Order Source” dropdown to select the option “Selection List”:

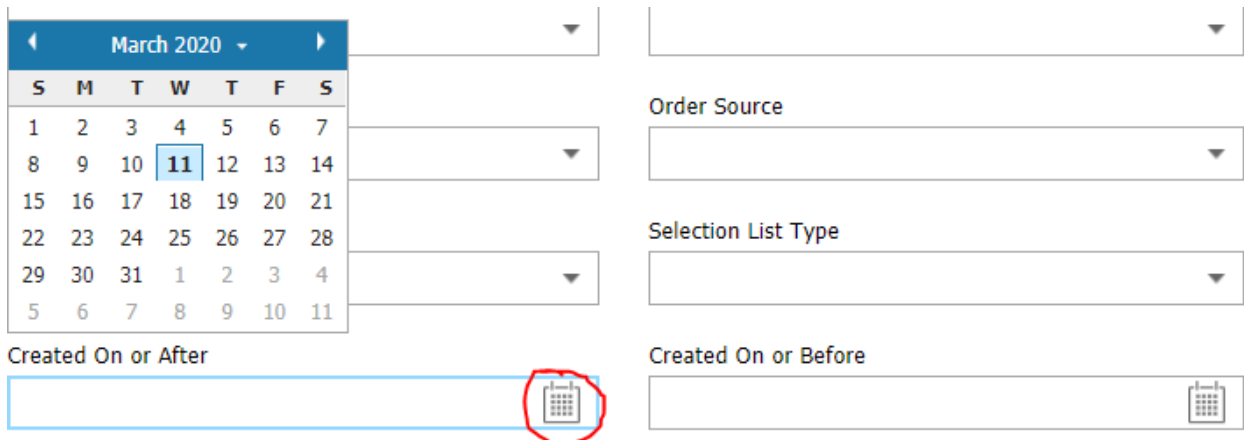


The screenshot shows a search form with several fields. The 'Order Source' dropdown menu is open, and the 'Selection List' option is highlighted in blue. A red circle is drawn around the 'Order Source' dropdown and its options.

Distribution Institution	Fiscal Cycle
Berlin Public Library	
Fund Category	Order Source
	Imported File
Selection List	Manually Created
	Selection List
Created On or After	Created On or Before

This will select all orders that were placed using a Selection List, regardless of which list they were on.

Optionally, you can set a date limit for the orders; this is useful as a way to keep from exporting every order, including ones that have already been exported. Use the “Created On or After” field to set a beginning date (all orders created *after* this date) by clicking on the calendar gadget in the field:





The screenshot shows the same search form as above, but with a calendar gadget open for the 'Created On or After' field. The date '11' is selected. A red circle is drawn around the calendar gadget icon in the 'Created On or After' field.

March 2020	
S M T W T F S	
1 2 3 4 5 6 7	
8 9 10 11 12 13 14	
15 16 17 18 19 20 21	
22 23 24 25 26 27 28	
29 30 31 1 2 3 4	
5 6 7 8 9 10 11	

Likewise, the “Created On or Before” field sets an end date (select orders up to this date). This is useful if you need a list of orders created only in the previous month.

With the fields filled in as needed, click the blue “Search” button:

Last Modified On or After 

Last Modified On or Before 

On the list of results, select all the titles you want printed out, or select all by clicking on the checkbox on the top header bar:

Staff > Acquisitions > Orders > Search Results

Search for an order

Order Results

<input type="checkbox"/>	Order Number	Title
<input type="checkbox"/>	WCTS-PO-154	In a jar / Deborah Marceró.
<input type="checkbox"/>	WCTS-PO-155	The oh she glows cookbook : over 100 vegan
<input type="checkbox"/>	WCTS-PO-156	I'm not just a scribble ... / written and illustrate

To export the orders, click on the “Export Order Data” button located just above the header bar:

12 results found | Order Number

Order Number	Status	Amount
...	Denied	\$ 75.98 USD

In the popup window that appears, be sure that the Format dropdown is set to Excel, and that “Only show distribution for current institution context and descendants” is checked (both are the defaults):

Export Order Data

Format *

Only show distributions for current institution context and descendants

Click “Export”, and the file will download as Excel, to the browser’s default location for downloaded files (usually “Downloads”).

Upon opening the Excel file, click “Enable editing” in the top yellow header if prompted, and then delete, rearrange, or expand columns as need to print the list; it works just as any other Excel file.