# **Order Record Status in Sierra**

When an order is made, Sierra gives you the option of encumbering a fund associated with the order—earmarking the order’s estimated price. Whether or not a fund is encumbered has to do with the STATUS of the order record. STATUS is also a good indicator of where the order record is in the Acquisitions workflow.

## Pending selection

These statuses can be used for order records that have been created, but the title has not been ordered by the library from the vendor, or the library has decided to not order a title.

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| **Code** | **Action** |
| 1 | ON HOLD – No encumbering. This is used for orders under consideration, or that have not yet been ordered from vendor. |
| 2 | APPROVAL REJ—Marks as rejected, so that the order does not encumber a fund. |

## Selecting titles from vendor

When records have been ordered from the vendor, these statuses will **encumber** (or, in the case of CANCELLED, **disencumber**) the order record’s fund. An encumbrance marks an amount of money to be set aside for the purchase of a title.

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| **Code** | **Action** |
| o | ON ORDER – Sierra encumbers the fund at an amount equal to order record’s EPRICE multiplied by its COPIES |
| c | SER ON ORDER—Encumbers the fund at amount equal to order record’s EPRICE. Helpful in distinguishing serial orders from firm orders |
| f | SERIAL NO ENC—Does not encumber or disencumber a fund, but allows payments on the order to be made. Often used for subscriptions. |
| g | SERIAL LIENED—No encumbrance when order is created, but disencumbers the fund when a payment is made. Also used for subscriptions. |
| z | CANCELLED – Fully disencumbers fund without expenditure |

## Titles paid and invoiced

When an order record is marked as paid by the posting of an invoice, the amount paid is marked as an **expenditure** on the order record’s fund. The previous encumbrance on the order records is disencumbered at the same time.

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| **Code** | **Action** |
| a and d | FULLY PAID and SERIAL PAID—Disencumbers fund and marks the payment as an expenditure in the fund |
| q and e | PART PAID and SER PART PAID—Only part of the encumbrance is removed and marked as expenditure |
| g | SERIAL LIENED—No encumbrance when order is created, but disencumbers the fund when a payment is made. Also used for subscriptions. |