

## Encumbering standing orders

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### Question

Has anyone decided to encumber standing orders and found advantages to doing so?

We never have and suspect there would be many negatives and few, if any, advantages. I don't think encumbering would give you valid numbers after fiscal roll-over anyway, because you couldn't really account for the annual price increases we see.

But, maybe we're missing some benefits we should consider, so we thought we'd put it out there.

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### Answer

[From Mark Hemhauser, University of Maryland, via Global Aleph Users list:]

You can rollover with an inflation factor. You could apply it only to your standing order rollover. We have one campus that encumbers serials. From what I've seen if the order is invoiced for less than encumbered, the remaining encumbrance balance does not clear. I believe this is because of the order type and Acq Method. They manually adjust all the balances. They also manually change the encumbered amount for the new year. We are not using the inflation factor option at rollover and they seem to prefer setting the encumbered amounts themselves.

I could ask them why they feel all this work is worthwhile.

**Category:** System Management (500)

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