

# Firm Order Cancellations (LTS Procedure #66) - FOLIO

**Scope:** This document outlines the procedure that LTS Acquisitions staff follow when processing a cancellation for materials that were not supplied by the vendor or that the subject specialist requested we cancel.

**Contact:** Masayo Uchiyama

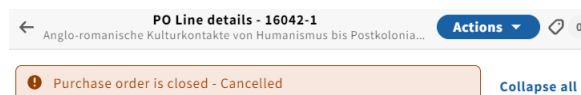
**Unit:** Acquisitions, Ordering

**Date last reviewed:** 05/19/23

**Date of next review:** May 2024

## A. Cancelling the Order for single line item orders:

- Search for your purchase order in the Orders app
- Click **Actions - Close order**
- Select "Reason" by clicking on the down arrow
- Add note for why it is being cancelled and click submit
- If you now click on the POL you will see:



- Move on to step "C"

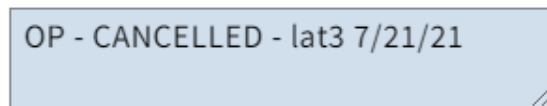


## B. Cancelling the Order when there are multiple line items:

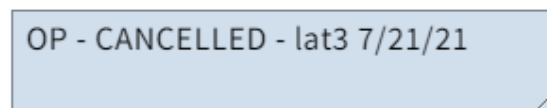
In the FOLIO POL (purchase order line), make a notation in the line item **Receiving note and Cancellation description** by clicking **Actions-Edit** with the following information:

- The reason the title was cancelled: **Example:** Out-of-Print (or "OP") Out-Of-Stock Indefinitely (or "OSI") Publication Abandoned (or "PA")
- The phrase, "Order Cancelled" (or "OC") or just "CANCELLED"
- Your netID and Today's date **Example:** OP - CANCELLED - lat3 7/21/21

### Receiving note



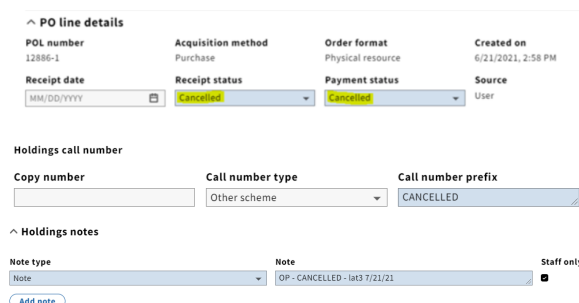
### Cancellation description



Scroll down to PO line details, and from the drop-down menus, change status to Cancelled for both Receipt status and Payment status.

## C. Adjusting the Inventory Records

- Click on the hyperlink in your POL to take you to the Inventory app
- When the cancelled title is associated with a title that has only one location, suppress the Instance, holding and item for the FOLIO record associated with the order.
- Add appropriate **note in the holdings call number prefix "CANCELLED"** by clicking **Actions-Edit** and add the same note in the Holding note field as you did on your POL.
- When the cancelled title is associated with a bibliographic record that has multiple locations, suppress ONLY the holding and item associated with the order.



**D. Notifying the Selector when cancellation is received from the vendor:**

- E-mail the ordering selector to alert him/her of the cancelled title
- Include POL number, title, and Instance record number for the publication
- Discard the cancellation notification from the vendor.
- If the cancellation was at the request of the subject specialist you will email the vendor of the cancellation and copy the subject specialist.