

Creating Orders for XBOs (Items Expected on Approval) (LTS Procedure #84) - Voyager

Scope: Occasionally, a patron requests an item or a selector requests an item to be New & Noteworthy that the Ordering staff either knows or suspects will arrive on one of the Library's approval plans. In both cases, a purchase order must be created to record the requester information .

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Requested titles **expected/suspected** to arrive on an approval plan

Requested titles expected to arrive through the NPAC blanket plan

When an item has been profiled by a vendor for approval or is **expected/suspected** to come on approval, a purchase order should be created. The PO will serve as a placeholder for Requester or Receiving instructions.

A. Requested title expected/suspected to arrive on approval plan:

This purchase order does not need to be sent to the vendor. If the title has not been published or profiled by the vendor, we should still create a purchase order.

1. Create a new purchase order.
2. Select "Approval" from the **TYPE** field.
3. In the **ORDER LOCATION, SHIP TO** and **BILL TO** fields, select "LTS Approvals".
4. Enter the vendor code.
5. Import the bibliographic line item.
6. Leave the price at \$0.
7. Select "**LTS review shelves**" as the item's location.
8. In the fund code field, enter **521** for Coutts approval items or appropriate selector fund for other vendors.
9. Enter the requester information in the **REQUESTER** note field. Example: **REQ:bm123@, Bat Man**.
10. Enter New & Noteworthy in the in the **REQUESTER** note field. Example: **New & Noteworthy**
11. Approve the PO but do not print or send it to vendor via EDI. It is a placeholder only.
12. In the Holdings screen, add a subfield "x" after "cts,rev" in the 852 field, and type "**XBO REQ see PO**" or "**XBO New & Noteworthy**"
13. Suppress Bib and Holdings records.

B. Requested title expected to arrive on NPAC blanket plan:

Records for items expected to arrive from Southeast Asia on the NPAC plan (usually for Echols) are entered solely to prevent duplication by firm orders. A purchase order should be created and that will serve as a placeholder for Requestor or Receiving instructions.

1. Create a new purchase order.
2. Select "Approval" from the **TYPE** field.
3. In the **ORDER LOCATION, SHIP TO** and **BILL TO** fields, select "LTS Approvals".
4. Enter the vendor code as **NPAC**
5. Import the bibliographic line item.
6. Leave the price at \$0.
7. Select "**ECH**" as the item location.
8. In the fund code field, enter **LOOK**.
9. Enter the requester information in the **REQUESTER** note field. Example: **REQ:bm123@, Bat Man**.
10. Approve the PO but do not print or send it to vendor via EDI. This PO does not need to be sent to the vendor.
11. In the Holdings screen, add a subfield "x" after "Ech" in the 852 field, and type '**XBO REQ see PO**'.