

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.

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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:

The screenshot shows the 'PO Line details - 16042-1' page. At the top, there is a navigation bar with a back arrow, the title 'PO Line details - 16042-1', and an 'Actions' button. Below the navigation bar, the main content area shows the title 'Anglo-romanische Kulturkontakte von Humanismus bis Postkolonia...'. A status bar at the bottom indicates 'Purchase order is closed - Cancelled' with a 'Collapse all' link.

- 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

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.

The screenshot shows the 'Close - purchase order - 16042' form. It has a 'Reason' dropdown menu set to 'Cancelled'. Below it is a 'Notes' text area containing 'OP - lat3 7/21/21'. At the bottom, there are 'Cancel' and 'Submit' buttons.

Receiving note

The screenshot shows the 'Receiving note' field in the FOLIO interface. It contains the text 'OP - CANCELLED - lat3 7/21/21'.

Cancellation description

The screenshot shows the 'Cancellation description' field in the FOLIO interface. It contains the text 'OP - CANCELLED - lat3 7/21/21'.

The screenshot shows the 'PO line details' page in the FOLIO interface. It displays various fields including 'POL number', 'Acquisition method', 'Order format', 'Created on', 'Receipt date', 'Receipt status', 'Payment status', and 'Source'. The 'Receipt status' and 'Payment status' are both set to 'Cancelled'. Below this, there is a section for 'Holdings call number' with fields for 'Copy number', 'Call number type', and 'Call number prefix'. The 'Call number prefix' is set to 'CANCELLED'. At the bottom, there is a section for 'Holdings notes' with a 'Note type' dropdown set to 'Note' and a 'Note' text area containing 'OP - CANCELLED - lat3 7/21/21'. There is also a 'Staff only' checkbox.

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.