# 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:



• 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

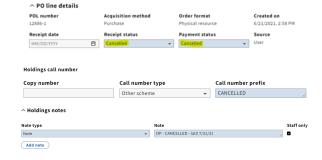
- Click on the hyperlink in your POL to take you to the Inventory app
- When the cancelled title is associated with a title that has only one location, suppress the Instance, holding and item for the FOLIO record associated with the order.
- Add appropriate note in the holdings call number prefix "CANCELLED" 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.

## Receiving note

OP - CANCELLED - lat3 7/21/21

### Cancellation description

OP - CANCELLED - lat3 7/21/21



## D. Notifying the Selector when cancellation is received from the

- E-mail the ordering selector to alert him/her of the cancelled title
  Include POL number, title, and Instance record number for the
- Include POE 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.