

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:

PO Line details - 16042-1
Anglo-romanische Kulturkontakte von Humanismus bis Postkolonia...

Actions

Purchase order is closed - Cancelled

- Move on to step "C"

Close - purchase order - 16042

Reason
Cancelled

Notes
OP - lat3 7/21/21

Cancel Submit

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

OP - CANCELLED - lat3 7/21/21

Cancellation description

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.

PO line details

POL number: 12886-1
Acquisition method: Purchase
Order format: Physical resource
Created on: 6/21/2021, 2:58 PM

Receipt date: MM/DD/YYYY
Receipt status: Cancelled
Payment status: Cancelled
Source: User

Holdings call number

Copy number: [empty]
Call number type: Other scheme
Call number prefix: CANCELLED

Holding notes

Note type: Note
Note: OP - CANCELLED - lat3 7/21/21
Add note

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.