POOF2 Selector Procedure (LTS Procedure #144)

Scope: *This procedure describes how to create an account, edit your profile, and create orders in the Pre-Order Online Form tool.*

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Unit: Ordering

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Host URL

http://poof2.library.cornell.edu

Supported browsers: Firefox and Chrome. REQUIRES VPN off-campus.

Sign up for an account

1. Click on the Sign up link at the top of the page
    a. Type in your institutional id (e.g., Netid at Cornell)
    b. Type in your institutional email address
    c. Type in a password and write it down
    d. Click Sign up button

Customize your profile

1. Click on the Sign in link at the top of the page
    a. Type in your email and password
    b. Click Sign in button
2. Edit user profile
    a. Your username and password should be correct
    b. Type in your full name
    c. Select your default currency (USD)
    d. Add the Home OCLC symbol (e.g., COO for Cornell)
    e. If you want to see the holdings for particular other libraries when you search for an item in OCLC, add their OCLC holdings symbols to the Holdings Preferences input box. If you do not know what they are, click the green and white i icon to the left of Holdings Preferences. All of the Borrow Direct symbols are listed, and a link to the OCLC lookup page is provided in the help popup. (To close the help popup click on the green and white i icon again.)
    f. To add your favorite funds, click in the Favorite Funds input box and start typing the fund code. Click to add it to your favorite funds list. Repeat this for your other favorites.
    g. To add your favorite locations, click in the favorite locations input box and start typing in the location code. Click to add it to your favorite locations list. Repeat this for your other favorite locations.
    h. You do not need to do anything in the password field at this time. That section is only used if you need to change your password.

Create an order

1. Click on the Sign in link at the top of the page
    a. Type in your email and password
    b. Click Sign in button
2. Click on the Selector Tools link at the top of the page
3. Click Create a new order in the drop down menu
4. You may search POOF2 with either an ISBN or an OCLC number. If you have an OCLC number for the item and manifestations that you want, then use that, because it is more precise. Add the identifier of your choice and click the Go button.
5. If you search by ISBN your result set will probably contain more than one manifestation. The result set is sorted by number of libraries that hold that particular bib record. Therefore, the first result is probably, but not always the one you want to use. In general, the more complete bib records are better. You also need to check the format column. If, for example, you want an ebook, select the most popular or complete ebook manifestation. To select one of the rows in the result set click anywhere in that row. (Note, the first column, OCLC Num, includes a hyperlink that will take you to the record in WorldCat; you are unlikely to need that.)
6. After you click on the row your view of the form will jump down to the Check Bibliographic Information section. Quickly scan the metadata to make sure you clicked on the right item.
7. Scroll down to the Enter Order Information section at the bottom of the form.
    a. If you have the institutional id (i.e., Netid for Cornell) for a requester, enter the netid in the first part of the section. You may add multiple requesters.
    b. If this item is for a course, click the Show course reserve information button. Add the course name/number and semester.
    c. Enter a price. Close is good enough. This is the amount that will be encumbered in the fund you select.
    d. Check that your currency is correct.
    e. Click on the Fund drop down. If the fund you want to use is one of the favorites that you set up in your profile, it will be listed at the top of the drop down list, in which case you may click on it. If the fund you need is not one of your favorites, start typing it. When it shows up in the list click on it.

    f. Click on the Locations drop down. If the location you want to use is one of the favorites that you set up in your profile, it will be listed at the top of the drop down list, in which case you may click on it. If the location you need is not one of your favorites, start typing it. When it shows up in the list click on it.
    g. If the item is Rush, click on the Yes radio button in the Rush? option.
    h. If you have additional information to convey to Acquisitions staff, add it to the last line of the form. Click the Order button at the bottom of the screen. (Note, if you do not want to order the item today but want to save it for later, click the Defer button instead.) After you click the Order button you should see a confirmation message at the top of the page.

Review your orders

1. After you create the order it is placed in a queue until a cron job runs later that evening and picks it up for processing. Until that happens, you may edit the order. To edit an order that is queued up click the Selector Tools menu then click the Ordered option in the drop down. You should see all the items you ordered that day.
    a. Click Show to review the item
    b. Click Edit to change the order
    c. Click Destroy to cancel the order
2. When the items for a given day are processed, their status changes. When that happens you can still see the item in POOF2 by clicking the Selector Tools menu item called Sent to Ordering System.