

Processing an ongoing order cancellation (LTS Procedure #115)

Scope: This document outlines the process that Library Technical Services serials staff follow when closing out a serial record due to a cancellation.

Contact: [Joanna Cerro](#)

Unit: Serials Management

Date last updated: 3/15/2024

Date of next review: Mar. 2025

1. In the Receiving app record of the cancelled serial, delete all pieces populating the *Expected* field by clicking each individual piece (if we know we won't be receiving the issues) and selecting *Delete*.

×

Mother Jones.
259274-1

Edit

Collapse all

Mother Jones.

▼ Title information

^ POL details

POL number
259274-1

Expected receipt date
04/02/2021

Receiving note
olin AP2 M91 + ci:Per Rm

Order type
Ongoing

Vendor
EBSCO

Material supplier
-

^ Expected

Receive

Add piece

Caption	Piece format	Expected receipt date	Request
v.47, no.1 (2022 Jan-Feb)	Physical	03/31/2022	- >
v.47, no.2 (2022 Mar-Apr)	Physical	05/31/2022	- >
v.47, no.3 (2022 May-Jun)	Physical	07/31/2022	- >

^ Received

Unreceive

Barcode	Caption	Piece format	Received date	Request
-	v.46, no.2 (2021 Mar-Apr)	Physical	04/26/2021	- >
-	v.46, no.3 (2021 May-Jun)	Physical	04/26/2021	- >

Edit piece

Caption
v.47, no.1 (2022 Jan-Feb)

Piece format *
Physical

Expected receipt date
03/31/2022

Comment

Select location
Olin (olin)

Supplement
☐

Assign a different location

CancelDeleteQuick receiveSave & close

2. Open the Instance record in the Inventory app by clicking on the title at the top of the Receiving record, which is a link. You'll want to open the link in a new tab so you can easily navigate back and forth between Receiving and Inventory.

Invoices

Licenses

Orders

Organizations

Receiving

Users

Settings

Mother Jones.
259274-1

Edit

Collapse all

Mother Jones.

▼ Title information

^ POL details

POL number

259274-1

Expected receipt date

04/02/2021

Receiving note

olin AP2 M91 + ci:Per Rm
CANCELLED AFTER 2021

Order type

Ongoing

Vendor

EBSCO

Material supplier

-

3. Open the holdings record by clicking View holdings next to the appropriate location.

Instance record Mother Jones. Foundation for National Progress]

Actions

0

Collapse all

Instance record (unspecified)

Mother Jones.

▼ Holdings: Olin > Oversize AP2 .M91 +

View holdings

Add item

27

▼ Holdings: Law > No call number

View holdings

Add item

0

▼ Holdings: RMC > Human Sexuality AP2 .M91

View holdings

Add item

0

▼ Holdings: Mann Reference > Disk AP2 .U51 GMOJ

View holdings

Add item

0

Add holdings

4. Select *Actions* and then *Edit* in the upper-righthand corner of the holdings screen.

Holdings: Olin > Oversize AP2 .M91 +

Actions

Instance: Mother Jones., Foundation for National Progress]

Collapse all

5. Make sure the holdings statement is accurate and shows the final completed volume before cancellation.

X

Mother Jones.
Foundation for National Progress]

Holdings call number

Copy number

Call number type

Call number prefix

Call number

Call number suffix

Library of Congress classification

Oversize

AP2 .M91

+

^ Holdings details

Number of items

Holdings statements

Holdings statement

Holdings statement public note

Holdings statement staff note

v.1 (1976:Feb./Mar.-Aug.)

v.4-27 (1979-2002)

v.34:no.1-3,5-6 (2009:Jan./Feb.-May/June,Sept./Oct.-Nov./Dec.)

v.35 (2010)

v.42:no.3-6 (2017:May/June-Nov./Dec.)

v.43:46 (2018-2021)

Add holdings statement

6. Scroll down to Holdings notes, click *Add note*, select *Note* for type and add the public cancellation statement. Leave the staff only toggle unchecked since this note should be visible to the public.

^ Holdings notes

Note type

Note

Staff only

Note

Current issues shelved in Current Periodicals Room

☐

Note

Publication cancelled after 2021

☐

Add note

7. Scroll down to Acquisition and update Receipt status to *Not currently received* for a cancelled subscription.

^ Acquisition

Acquisition method

Order format

Receipt status

Not currently received

8. Click Save & close at the bottom of the screen when done.

9. Click the X in the upper-lefthand corner of the screen to exit the holdings record.

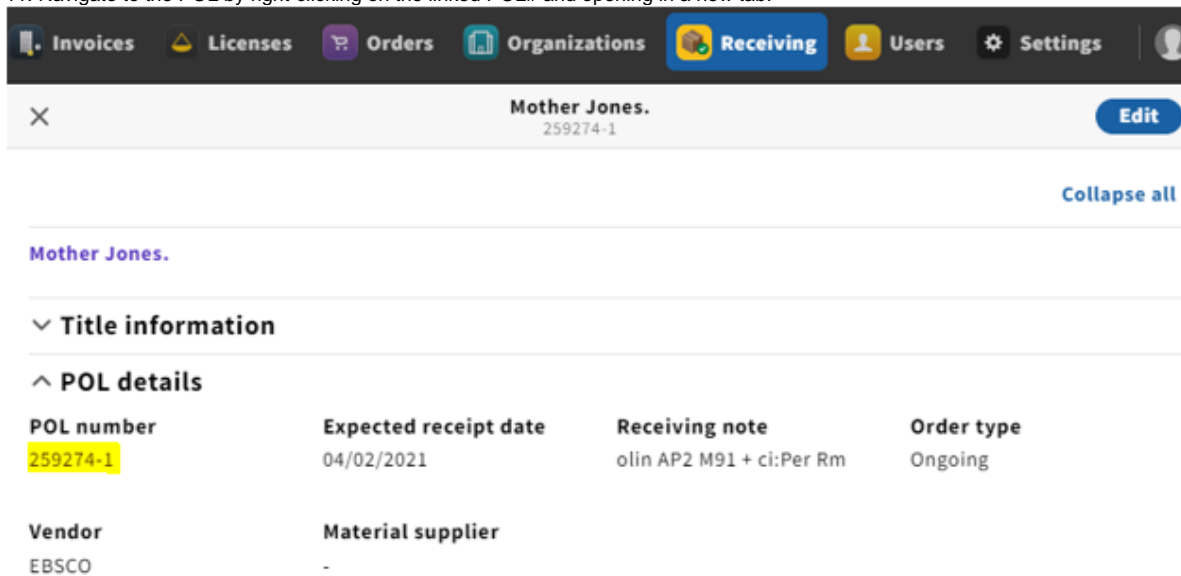
X

Holdings: Olin > Oversize AP2 .M91 +

Instance: Mother Jones.. Foundation for National Progress]

10. Exit out of the Inventory app tab and go back to the Receiving app tab.

11. Navigate to the POL by right-clicking on the linked POL# and opening in a new tab.



Mother Jones. 259274-1 [Edit](#)

[Collapse all](#)

Mother Jones.

▼ **Title information**

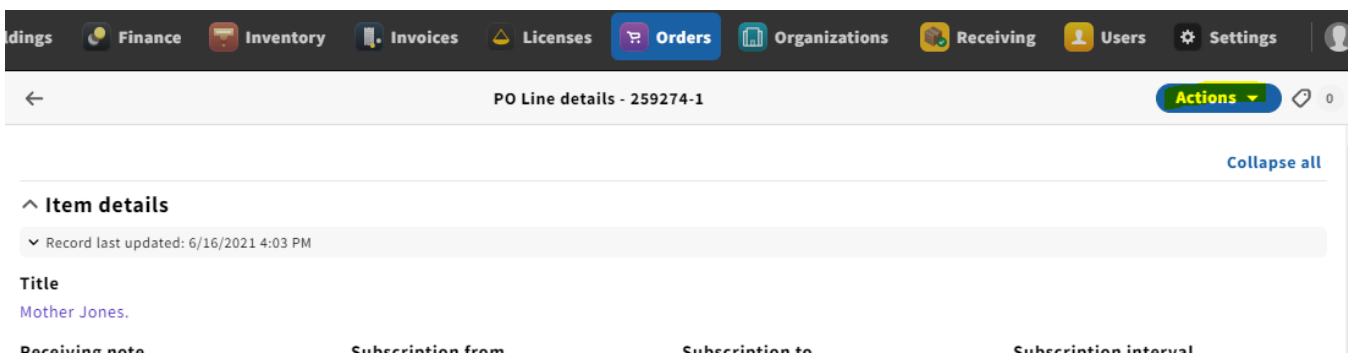
^ **POL details**

POL number	Expected receipt date	Receiving note	Order type
259274-1	04/02/2021	olin AP2 M91 + ci:Per Rm	Ongoing

Vendor
EBSCO

Material supplier
-

12. Select *Actions* and then *Edit* in the upper-right hand corner of the POL detail screen.



PO Line details - 259274-1 [Actions](#) 0

[Collapse all](#)

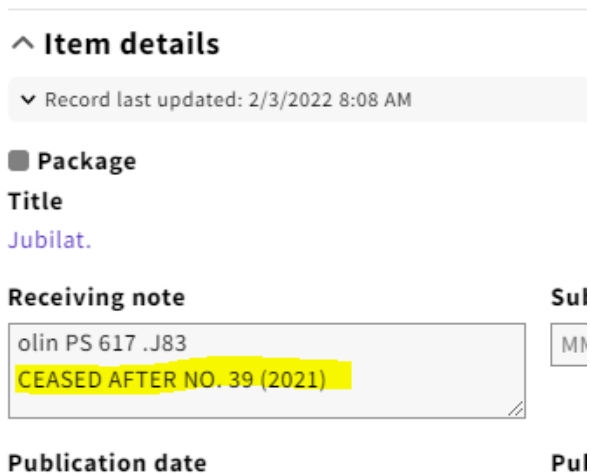
^ **Item details**

▼ Record last updated: 6/16/2021 4:03 PM

Title
Mother Jones.

Receiving note	Subscription from	Subscription to	Subscription interval
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13. You'll want to indicate that the ongoing order has been cancelled after a given year in the *Receiving note* field.



^ **Item details**

▼ Record last updated: 2/3/2022 8:08 AM

Package

Title
Jubilat.

Receiving note

olin PS 617 .J83
CEASED AFTER NO. 39 (2021)

Publication date

14. Scroll down to PO line details, and change both the *Receipt status* and *Payment status* (as long as the last invoice has been paid) to *Cancelled* from the drop-down menu.

^ PO line details

POL number 1ABF1018-1	Acquisition method Purchase at vendor system	Order format Physical resource	Created on 12/3/2020, 1:09 PM
Receipt date 03/19/2021	Receipt status Cancelled	Payment status Cancelled	Source User

15. Click *Save & close*

16. As of Jan. 2023, if this is the only POL on the PO, changing the Receipt and Payment status fields to *Cancelled* will automatically close out the entire PO.

An alternative way to close the PO would be to do so at the PO level (as opposed to the POL level). Take the following steps to do so:

a. Click the arrow on the upper-lefthand corner of the POL details pane, which takes you to the PO itself

InvoicesLicensesOrdersOrganizationsReceivingUsersSettings

PO Line details - 259274-1

Actions

Collapse all

^ Item details

Record last updated: 6/16/2021 4:33 PM

Title

Mother Jones.

Receiving note

olin AP2 M91 + ci:Per Rm
CANCELLED AFTER 2021

Subscription from

-

Subscription to

-

Subscription interval

-

Publication date

-

Publisher

-

Edition

-

Linked package

-

Contributors

b. Click *Actions* and *Close order*

Purchase order - 259274

Actions

Edit

Close order

Unopen

Update encumbrances

Duplicate

Delete

^ Purchase order

Record last updated: 6/16/2021 4:33 PM

PO number
259274

Vendor
EBSCO

Approval date
6/16/2021, 4:33 PM

Assigned to
Warfield, Debra Claire

Manual
☒

Re-encumber
☒

Bill to
LTS Acquisitions
110 Olin Library
Cornell University Library
Ithaca, NY 14853

Ship to
LTS E-Resources & Serials
110 Olin Library
Cornell University Library
Ithaca, NY 14853

Created by
admin, admin

Created on
12/3/2020, 1:40 PM

c. A pop-up box will appear where you can indicate why you are closing the PO. For cancellations, you'll want to select *Cancelled*. If you would like to add a note reiterating what you've already added to the Receiving note, you can do so.

Close - purchase order - 259274

Reason

Cancelled

Notes

CANCELLED AFTER 2021

Cancel

Submit

d. To close the order, click *Submit*. A confirmation message appears and the order's status changes to *Closed*.