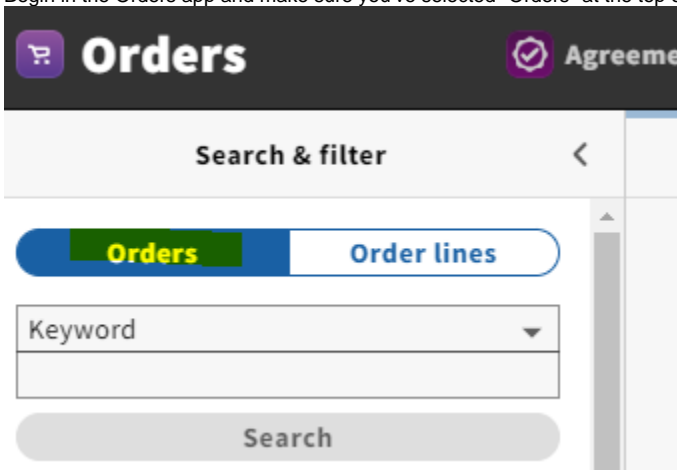
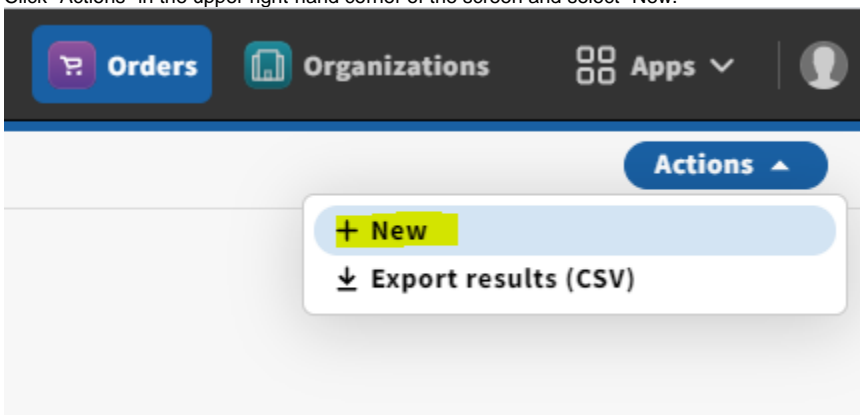


How to create an ongoing order PO for electronic resource [NO LONGER UP TO DATE. see <https://confluence.cornell.edu/pages/viewpage.action?pageId=476099825>]

1. Begin in the Orders app and make sure you've selected "Orders" at the top of the left-hand column on the screen.



2. Click "Actions" in the upper right-hand corner of the screen and select "New."



3. You'll be directed to the Edit Purchase Order screen, where you can begin filling in your PO "header" information. Fill in the following information in the "Purchase Order" section:
 - a. PO number: FOLIO will auto-populate this field with a system-generated number. Add an "e" to the end of this number to indicate that this is an e-resource PO
 - b. Vendor
 - c. Order type: Ongoing
 - d. Bill to/Ship to: LTS E-Resources & Serials

^ Purchase order

Prefix	PO number	Suffix
<input type="text"/>	13279e	<input type="text"/>

Vendor*	Order type*	Acquisition units	Assigned to
EBSCO	Ongoing	<input type="text"/>	<input type="text"/>

Organization look-up

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

Manual	Re-encumber	Created by	Created on
<input type="checkbox"/>	<input checked="" type="checkbox"/>	-	-

Tags

4. Scroll down to "Ongoing order information" and check the "Approved" box and click "Save & close".

Note: At this point (as of Oct. 2021), I haven't found the other fields in this section to be useful, but that doesn't mean they won't be in the future. For now, I don't think there's a need to fill them in.

^ Ongoing order information

Subscription	Renewal interval ⚙	Renewal date ⚙	Review period ⚙
<input type="checkbox"/>	<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>
Manual renewal	Review date	Notes	
<input checked="" type="checkbox"/>	<input type="text" value="MM/DD/YYYY"/> 📅	<input type="text"/>	

^ PO summary

Total units	Total estimated price	Approved	Workflow status
-	-	<input checked="" type="checkbox"/>	Pending

Save & close

5. The purchase order will now display in the third column on the screen. Click on "Add PO line" under the "PO lines" accordion in the purchase order.

×

Purchase order - 13279e

Actions ▾

🔍 0

^ Ongoing order information

Subscription	Review date	Notes
<input checked="" type="checkbox"/>	-	-

^ PO summary

Total units	Approved	Workflow status
0	<input checked="" type="checkbox"/>	Pending

Total estimated price	Total expended
\$0.00	\$0.00

^ PO lines

Add PO line

The list contains no items

🔍 End of list

^ Related invoices

The list contains no items

6. In the "Item details" section of the "Add PO line" screen, click "Title look-up" to link the POL (PO line) to the appropriate Instance record in Inventory.

Add PO line

^ Item details

☐ Package

Title *

Title look-up

Receiving note

Subscription from

Subscription to

Subscription interval

Publication date

Publisher

Edition

Linked package

Lookup package POL

Please add contributor

Add contributor

7. The "Select instance" box will appear where you can search by title name. Select the title you would like to link the POL to.

Select instance

Search & filter

Search results

2 records found

Search

Reset all

Language

English

Spanish

French

German

Mandarin

Russian

Arabic

Resource Type

Close

Title	Contributors	Publishers
Hungarian Journal of Minority Studies.		Nemzetpolitikai Kutatóintézet
Hungarian Journal of Minority Studies		

End of list

Note: Often the search will result in several records of the same title. Right-clicking on the "Connected" link will bring you to the Instance record of the title you selected. If it happens to be the wrong title, you can click on "Title look-up", search the title again, and select the correct one.

Add PO line

^ Item details

☐ Package

Title *

Connected

Hungarian Journal of Minority Studies.

Title look-up

8. The "Receiving note" field is a good place to put any pertinent information/notes.

Note: As of Oct. 2021, I've been leaving the subscription fields in this section blank. I haven't yet found a use for them.

Add PO line

^ Item details

☐ Package

Title *

Connected

Hungarian Journal of Minority Studies.

Title look-up

Receiving note

Alert e-resources when invoice received, 10/8/21

Subscription from

Subscription to

Subscription interval

Publication date

Publisher

Edition

Linked package

Lookup package POL

9. Scroll down to "PO line details" and fill in the following fields:
 - a. Acquisition method: In most cases, you'll be selecting "Purchase at vendor system," which we select after placing an order via email or directly to the vendor somehow. The "Purchase" line is used to indicate that the order was placed by EDI, which is something we don't do in Serials/E-Resources.
 - b. Order format: Electronic resource
 - c. Receipt status and Payment status: Select "Pending" for both
 - d. Make sure you check the "Manually add pieces for receiving" box

Add PO line

^ PO line details

POL number	Acquisition method *	Order format *	Created on
-	Purchase at vendor system	Electronic resource	-
Receipt date	Receipt status	Payment status	Source
MM/DD/YYYY	Pending	Pending	User
Donor	Selector	Requester	
Cancellation restriction	Rush	Collection	Manually add pieces for receiving
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cancellation description	Line description	Tags	

10. Scroll down to "Cost details" and fill in the following fields:
 - a. Electronic unit price: 0
 - b. Quantity electronic: 1
 - c. Note: currency should always be in US dollars

Add PO line

^ Cost details

Physical unit price	Quantity physical	Additional cost
Currency *	Current exchange rate	Use set exchange rate
US Dollar (USD)	-	<input type="checkbox"/>
		Set exchange rate Ⓢ
Electronic unit price *	Quantity electronic *	Discount
0	1	
		Type
		% \$
		Estimated price ⓘ
		\$0.00

11. Scroll down to "Fund distribution" to add the appropriate fund(s). Expense class should either be "On going Electronic Res-Perpetual" or "Non-Perpetual" depending on the e-resource. To add multiple funds, click on "Add fund distribution" and change the "Value" percentage.

^ Fund distribution

Remaining amount to be distributed: \$0.00

Fund ID *	Expense class *	Value *	Type	Amount
410 Social Sciences CC (410)	On going Electronic Res - Perpetual	100	% \$	\$0.00

Add fund distribution

12. Under the "Location" section, select serv,remo and fill in Quantity electronic with 1.

^ Location

Name (code) *	Quantity physical	Quantity electronic *
serv,remo (serv,remo)		1
Location look-up		

Add location

13. Under E-resources details, select "None" from the "Create inventory" dropdown menu to avoid duplicate instance records being created and assuming that you will be creating the holdings record manually.

^ E-resources details

Access provider

EBSCO

✖

Activation status

☐

Activation due

MM/DD/YYYY

📅

Create inventory*

None

▼

Organization look-up

Material type

▼

Trial

☐

Expected activation

MM/DD/YYYY

📅

User limit

URL

14. Click "Save & open order" at the bottom right-hand corner of the screen.

Save & close

Save & open order

15. Verify the purchase order and the purchase order line display all entered information correctly. To view the PO line from the Purchase Order view screen, click anywhere on the PO line under the "PO lines" accordion.