Processing a ceased serial (LTS Procedure #169)

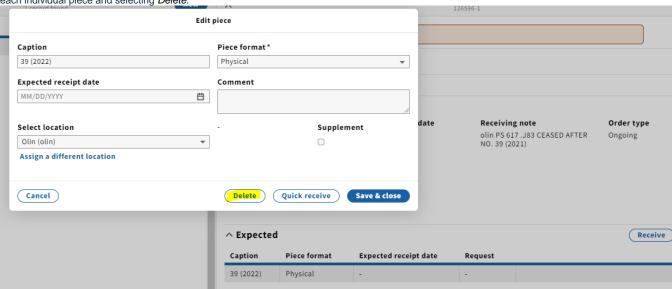
Scope: This document outlines the process that Library Technical Services serials staff follow when processing a serial that has been ceased. Note: In the case of a ceased serial, Paul Heckathorn (pjh25) (E-Resources & Serials Assistant) should be notified after taking the steps below. Jarrett Villines (jcv44) (Public Services Assistant) should be notified so he can bind what is unbound in the stacks.

Contact: Joanna Cerro

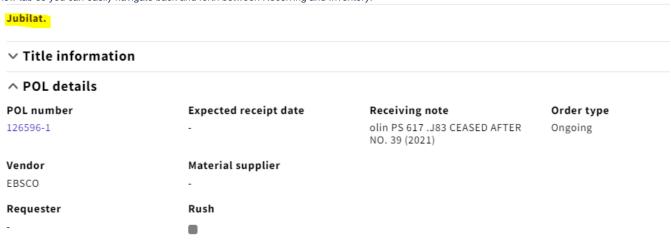
Unit: Serials ManagementDate last updated: 2/17/2022

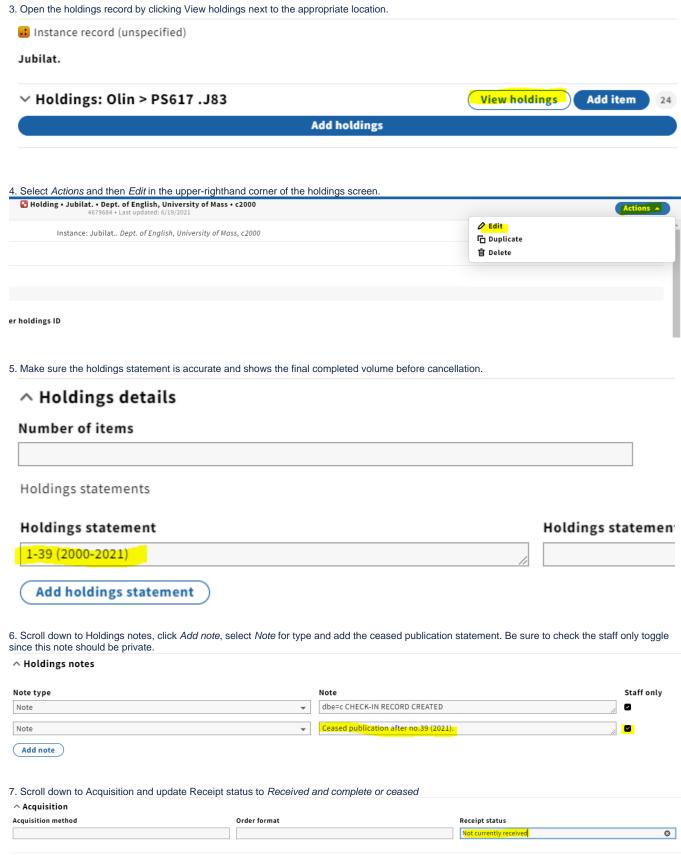
Date of next review: February 2023

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



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.





Note: As of the Kiwi release, these fields are no longer available. They may be available again for the Lotus release in Spring 2022.

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.



- 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.

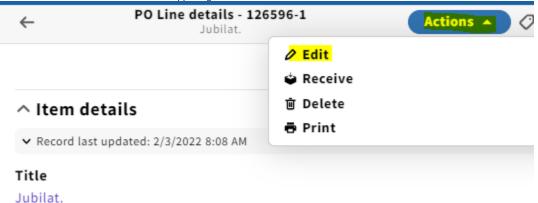
Jubilat.

Title information

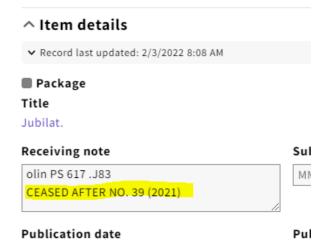
^ POL details



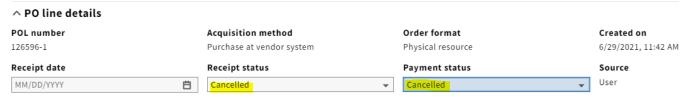
12. Select Actions and then Edit in the upper-righthand corner of the POL detail screen.



13. You'll want to indicate that the ongoing order has been ceased after a given year in the Receiving note field.

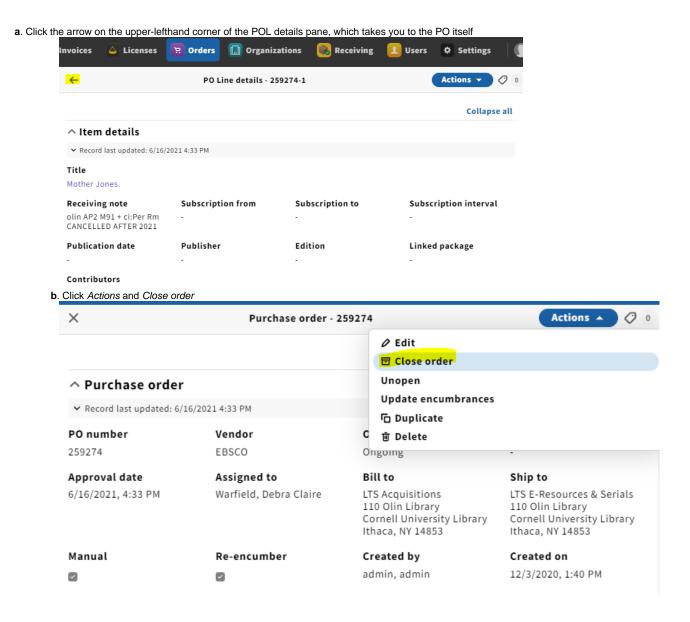


14. Scroll down to PO line details, and change both the *Receipt status* and *Payment status* (as long as the last invoice has been paid) to *Cancelled* from the drop-down menu.

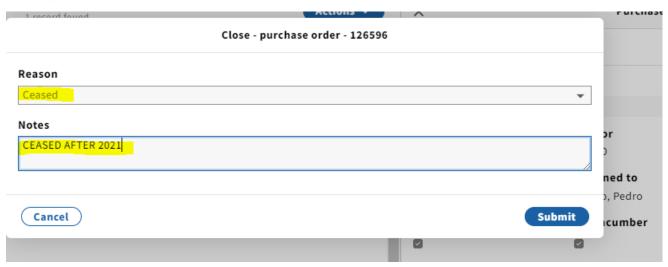


15. Click Save & close

16. If this is the only line item on the purchase order, you will want to close out the PO. Note that only open orders can be closed. Take the following steps to do so:



c. A pop-up box will appear where you can indicate why you are closing the PO. Select Ceased under the *Reason* dropdown menu and note when the publication was ceased.



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