

Daily Print Firm Order Processing (LTS Procedure #117)-FOLIO

Scope: This document provides guidelines for Ordering staff to process and send items ordered each day by staff and through Oasis Ally and POOF.

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Unit: Ordering

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Open Cyberduck and download print order marc files
Open Lehigh App and upload files
Open FOLIO Orders App to search PO
Create CSV file for EDI vendors. Print PO for non-EDI vendors
Send orders to vendor via email with CSV file or print PO as PDF attachment

A. In Cyberduck, download marc files of print orders submitted through Oasis Ally and POOF previous work day.

1. Double click each file to download. Files get sent to your download folder.
2. Use MarcEdit to update order marc record (vendor code, location, fund etc.) as needed.
3. Compile file into marc and rename.

B. Use Lehigh App to create PO in FOLIO. <https://folio-order-import-dev.aws-ecs.library.cornell.edu/order-import-poc/import> (when you remote, use <https://folio-order-import-dev.aws-ecs.internal.library.cornell.edu/order-import-poc/import>)

1. Choose a file and send request, wait for results (PO, POL, Title, number of holdings, HRID number, ISBN number, series title, selector's notes for LTS) Carefully review results.
2. If there is a series title, search in Inventory app to verify it is not a former standing order.
3. If more than one holding in results, click the title to go to the inventory app. Verify it is not a duplicate order. Unless selector instructed as intentional duplicate.
4. Write down PO and number of PO Lines in memo pad as your record.

NOTES: Lehigh app gives you an error message without any results if there is no sufficient fund. Search new PO in Orders app, and you will find pending PO created by Lehigh app. This pending PO can be deleted.

C. Do a compound search in Orders App for current day's firm orders created by Lehigh App then create CSV file for EDI vendors.

1. Compare the information for each PO number displayed in FOLIO search result and PO number in your note pad.
2. For EDI vendors, create CSV file in Orders App. Click action button on right hand corner of middle pane, and select Export results (CSV).
3. When you click Export results (CSV), Export settings window pops up. We need PO number from PO field. POLine number, Title, Publisher, Product ID (ISBN), Rush, Physical unit price, Quantity physical, Currency, Fund code & Location from POL fields to export. Click Export once selection is done.
4. For non-EDI vendors, print order in PDF format. Click action in right hand corner of right pane, select Print order. Save as PDF and use PO number for the file name.



Orders Agreement

Search & filter

- Approve
- Acquisition unit
- Assigned to
- Created by**
- Find User
- Date created**
 - From:
 - To:
 -
- Date opened
- Order type
- Vendor**
Organization look-up
- Tags
- Reason for closure
- Re-encumber
- Subscription
- Renewal date
- Manual renewal
- Review period
- Bill to
- Ship to**

Actions

-
- Export results (CSV)**
- Show columns
 - PO number
 - Vendor code
 - Status
 - Order type
 - Last updated
 - Acquisition unit
 - Assigned to

Export settings

This export could take a few minutes. If you reload or close the page the export will not be completed. Once the file is ready it could take another minute for your browser to finish downloading the file. You can continue to work with orders and order lines in a different browser tab if needed.

PO fields to export

All
 PO number X

POL fields to export

All
 POLine number X | Title X | Publisher X | Product ID, Qualifier, Product ID type X | Rush X
 Physical unit price X | Quantity physical X | Currency X | Fund code, Expense class, Value, Amount X
 Location, Quantity P, Quantity E X

Purchase order - 32773 Actions ▾ 0

- [Edit](#)
- [Close order](#)
- [Unopen](#)
- [Receive](#)
- [Update encumbrances](#)
- [New invoice](#)
- [Duplicate](#)
- [Re-export](#)
- [Delete](#)
- [Print order](#)

D. Examine CSV files and cleanup unwanted information for vendor. Email to EDI vendors with CSV file as attachments. Examine printed PO and email to non-EDI vendors with PDF as attachments.

NOTES: Some vendors send us order confirmation/acknowledgement and they should be filed in each vendor's folder of print mailbox for our record.

Coutts firm-order books are shelf-ready. We need to give Coutts instructions not to catalog/process if there are any books we need to avoid shelf-ready. (Example: copy 2, muti volumes)

VENDOR	EMAIL FOR CVS FILES
Amalivre	ama@amalivre.fr
Casalini	orders@casalini.it
Coutts	ordersacademic@proquest.com
Erasmus	erasmus@erasmusbooks.nl
Harrassowitz	service@harrassowitz.de
Mary Martin	info@marymartin.com
Midwest	orders2@midwestls.com
Vanschek	mullerm@vanschaik.com
Yankee	chuckeastman@ybp.com