

Creating an ongoing order PO for physical, electronic, or P+E mix [Procedure #169]

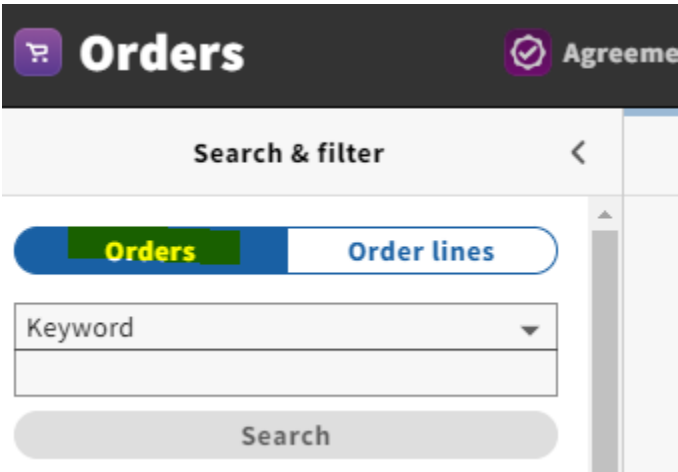
Contact: [Joanna Cerro](#)

Unit: LTS Serials

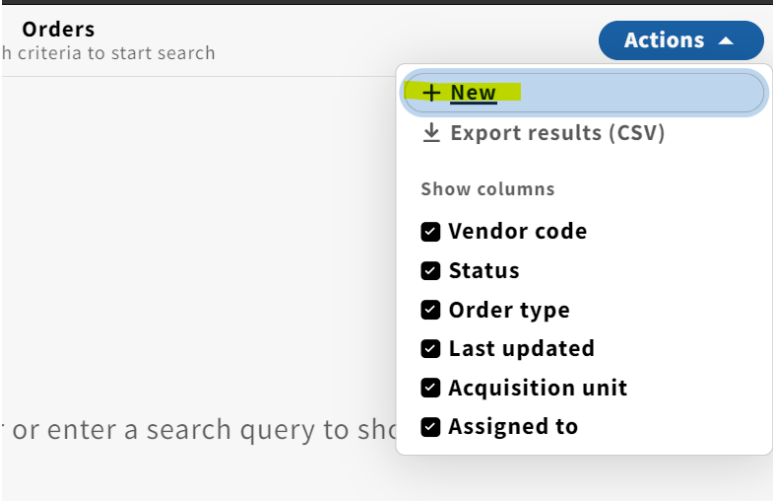
Date last updated: 07 May 2024

Date of next review:07 May 2025

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 if this is an e-resource PO
 - b. Vendor
 - c. Order type: Ongoing
 - d. Bill to/Ship to: LTS E-Resources & Serials
 - e. The Re-encumber box should be left checked

Create purchase order

^ Purchase order

Prefix

PO number

42846

Suffix

Vendor*

EBSCO



Order type*

Ongoing



Acquisition units

Assigned to



[Organization look-up](#)

Bill to

LTS E-Resources &
Serials



Address

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

Ship to

LTS E-Resources &
Serials



Address

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

Manual ⓘ

☐

Re-encumber

☒

Created by

-

Created on

-

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

Note: At this point (as of May 2024), 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 ⓘ

MM/DD/YYYY

Review period ⓘ

Manual renewal

☒

Review date

MM/DD/YYYY



Notes

^ PO summary

Total units

-

Total estimated price

-

Approved




Workflow status

Pending

Save & close

5. The purchase order will now display in the third column on the screen. Click on *Actions* under the PO Lines accordion and then click *Add PO line*.

^ Ongoing order information

| Subscription | Review date | Notes |
|---|-------------|-------|
|  | - | - |

^ PO summary

| | | |
|-----------------------|-------------------------------------|-----------------|
| Total units | Approved | Workflow status |
| 0 | <input checked="" type="checkbox"/> | Pending |
| Total estimated price | Total expended | |
| \$0.00 | \$0.00 | |

+ Add PO line

Show columns

- ☒ POL number
- ☒ Title or package name
- ☒ Product ID
- ☒ Vendor reference number
- ☒ Fund code
- ☒ Estimated price

^ PO lines

Actions

The list contains no items

End of list

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

MM/DD/YYYY

MM/DD/YYYY

Publication date

Publisher

Edition

Linked package

Lookup package POL

Please add contributor

Add contributor

7. The *Select instance* box will appear. Identify the title you would like to add as a POL. Searching by Instance HRID will yield the most accurate results.

×

Select instance

Search & filter

Instance Holdings Item

Instance HRID

15658917

Search

✕ Reset all

^ Effective location (item)

Language

Resource Type

Format

Mode of issuance

Close

Search results

Enter search criteria to start search

← Choose a filter or enter a search query to show results.

8. Click the title you wish to add from the results list.

×

Select instance

Search & filter

Instance Holdings Item

Instance HRID

15658917

Search

✕ Reset all

^ Effective location (item)

Language

Resource Type

Format

Mode of issuance

Close

Search results

1 record found

| Title ^ | Contributors | Publishers |
|--------------------------------------|-----------------------------------|-------------------------------------|
| YILLIK : annual of Istanbul studies. | İstanbul Araştırmaları Enstitüsü, | Istanbul Research Institute (2019-) |

< Previous

1 - 1

Next >

9. Fields under the Item details accordion will automatically populate upon attaching a POL to an Instance. The Receiving note is a good place to put any pertinent information regarding the order.

Note: As of May 2024, I've been leaving the subscription fields in this section blank. I haven't yet found a use for them.

^ Item details

☐ Package

Title *

Connected [↗](#)

YILLIK : annual of Istanbul studies.

[Title look-up](#)

Receiving note

Must acknowledge receiving note

On order



Subscription from

Subscription to

Subscription interval

MM/DD/YYYY



MM/DD/YYYY



Publication date

2019-

Publisher

Istanbul Research Institute

Edition

Linked package

[Lookup package POL](#)

Contributors

Contributor *

Contributor type *

Istanbul Araştırmaları Enstitüsü,

Corporate name



[Add contributor](#)

Product identifiers

Product ID *

Qualifier

Product ID type *

2687-5012

ISSN



[Add product ID and product ID type](#)

10. Scroll down to "PO line details" and fill in the Acquisition method field. 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 in some other way. 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.

^ PO line details

POL number

-

Acquisition method *

Purchase at vendor system

Created on

-

Receipt date

MM/DD/YYYY



11. Select the appropriate Order format: *Physical resource*, *Electronic Resource*, or *P/E Mix*. Select *Independent order and receipt quantity* under *Receiving workflow*, which is the workflow we select for all ongoing orders.

Note: In prior system releases, this field was a checkbox named *Manually add pieces for receiving*.

^ PO line details

| | | | |
|---|--|---|---|
| POL number - | Acquisition method * Purchase at vendor system | Automatic export <input type="checkbox"/> | Order format * Physical resource |
| Created on - | Receipt date MM/DD/YYYY | Receipt status | Payment status |
| Source User | Donor | Selector | Requester |
| Cancellation restriction <input type="checkbox"/> | Rush <input type="checkbox"/> | Collection <input type="checkbox"/> | Receiving workflow ⓘ * Independent order and receipt quanti |
| Cancellation description | Line description | Tags | |

12. Scroll down to the *Cost details* accordion. Fill in 0 for the unit price. Fill in the quantity (which will usually be one for serials & e-resources).

Physical:

^ Cost details

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

Electronic:

^ Cost details

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

P/E Mix:

^ Cost details

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

13. Fill in the *Fund ID* and *Expense class* under the *Fund distribution* accordion.

Physical:

^ Fund distribution

Remaining amount to be distributed: \$0.00

| Fund ID * | Expense class * | Value * | Type | Amount | |
|----------------------|-----------------------------------|---------|------|--------|--|
| 220 Humanities (220) | Physical Res - On-going-perpetual | 100 | % \$ | \$0.00 | |

[Add fund distribution](#)

Electronic:

^ Fund distribution

Remaining amount to be distributed: \$0.00

| Fund ID * | Expense class * | Value * | Type | Amount | |
|----------------------|-----------------------------------|---------|------|--------|--|
| 220 Humanities (220) | On going Electronic Res-Perpetual | 100 | % \$ | \$0.00 | |

[Add fund distribution](#)

The expense class could also be non-perpetual for electronic resources.

14. Under *Physical resource details*, *E-resource details* or both, make sure that *Instance, holdings* is selected under *Create inventory*. NOTE: This will **NOT** result in a duplicate *Instance* and *holdings* as long as you've followed these instructions correctly. *Instance, holdings* needs to be selected in order to link the correct *holdings* location to this order.

Select the holdings location attached to this order (you should only see one location under this drop-down menu). Fill in the Quantity for either Physical or Electronic.

Physical:

^ Location

| Select holdings * | Quantity physical * | Quantity electronic | |
|--|---------------------|---------------------|--|
| <div>Required!</div> <div>Filter options list</div> <div>Fine Arts > On Order</div> | 1 | | |

^ Physical resource details

| Material supplier | Receipt due | Expected receipt date | Create inventory * |
|-----------------------------|-------------|-----------------------|--------------------|
| Istanbul Research Institute | MM/DD/YYYY | MM/DD/YYYY | Instance, holdings |

Electronic:

^ Location

| Select holdings * | Quantity physical | Quantity electronic * | |
|----------------------|-------------------|-----------------------|--|
| Fine Arts > On Order | 0 | 1 | |

[Create new holdings for location](#)

[Add location](#)

^ E-resources details

| Access provider | Activation status | Activation due | Create inventory * |
|-----------------------------|--------------------------|----------------|--------------------|
| Istanbul Research Institute | <input type="checkbox"/> | MM/DD/YYYY | Instance, holdings |

P/E Mix:

^ Cost details

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

^ Fund distribution

Remaining amount to be distributed: \$0.00

| | | | | |
|---|--|----------------------------------|--------------------------------|--------|
| Fund ID * | Expense class * | Value * | Type | Amount |
| <input type="text" value="220 Humanities (220)"/> | <input type="text" value="Physical Res - On-going perpetual"/> | <input type="text" value="100"/> | <input type="text" value="%"/> | \$0.00 |

[Add fund distribution](#)

^ Location

| | | |
|--|--------------------------------|--------------------------------|
| Select holdings * | Quantity physical * | Quantity electronic * |
| <input type="text" value="Fine Arts > On Order"/> | <input type="text" value="1"/> | <input type="text" value="1"/> |

[Create new holdings for location](#)

15. Select Serial under Material type. Click Save & open order if you are done adding POL's.

Material type

Please add volume

[Add volume](#)

[Cancel](#)

☐ Create another

[Save & close](#)

[Save & open order](#)

If this is an electronic resource and you are adding more POL's, click Save & close and repeat the above steps. When done, click the arrow at the top left of the PO Line details screen to go back to the PO screen.

[←](#)

PO Line details - 42846-1
YILLIK: Annual of Istanbul Studies

Actions

[Collap](#)

^ Item details

▼ Record last updated: 5/7/2024 10:23 AM

Title

YILLIK: Annual of Istanbul Studies

| | | | |
|------------------|-------------------|-----------------|-----------------------|
| Receiving note | Subscription from | Subscription to | Subscription interval |
| - | - | - | - |
| Publication date | Publisher | Edition | Linked pack: |

Click [Open](#).

×

Purchase order - 42846

Actions

▲

🔖

0

✎ Edit

🛒 Open

📄 Duplicate

🔄 Re-export

🗑 Delete

🖨 Print order

^ Purchase order

▼ Record last updated: 5/7/2024 10:19 AM

| | | | |
|----------------------|--------------------|---|---|
| PO number | Vendor | Order | |
| 42846 <div>📄</div> | EBSCO | Ongoing | |
| Approval date | Assigned to | Bill to | Ship to |
| 5/7/2024, 10:19 AM | - | LTS E-Resources & Serials 110 Olin Library Cornell University | LTS E-Resources & Serials 110 Olin Library Cornell University |

NOTE: It's important to open a PO and not leave it as pending. Accounting cannot approve an invoice that has been paid from a pending PO.