

SECTION VI: PURCHASE ORDERS

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A. OVERVIEW OF ORDERING

Purchase orders are used for ordering in GetIt. Purchase orders have multiple levels of information.

Purchase Orders (PO)

The PO contains the vendor information and PO number.

Purchase Order Lines (PO LINES)

The PO Line contains the bibliographic information for the item that you are ordering.

Purchase Order Line Copies (PO LINE COPIES)

PO Line Copies represent each item that is ordered. For example, if you are ordering two copies of the same title, then you will have one PO Line for the title with two PO Line Copies attached. PO Line Copies are used to create on order item records in Bibliovation and to Receive items in GetIt.

B. STATUSES

POs, PO Lines, and PO Line Copies will have different statuses assigned, depending on where they are at in the ordering process.

Purchase Order Statuses

- **Open:** A status of *Open* is assigned when a PO is first created. It retains that status until it is approved. The PO displays as red.
- **Approved:** A status of *Approved* is assigned when a PO is Approved. Note that a PO *that has not been successfully received and acknowledged via EDI* will display a status of Approved. The PO displays as orange.
- **Acknowledged:** A status of *Acknowledged* is assigned after a PO has been sent to an EDI vendor, and the vendor has sent back an EDI Acknowledgement. The status usually changes to Acknowledged within a couple of hours after the PO is sent via EDI. If the status has not changed to Acknowledged within 24 hours of sending via EDI, then it is highly likely that there is a problem with the order and that the vendor has not received it. The PO displays as yellow.
- **Completed:** A status of *Completed* is assigned after all of the PO Line Copies on the PO have been both received and invoiced, meaning that all items were physically received by the library and the money for all PO Line Copies has been expended. The PO displays as blue.

Orders							
	New	Edit	Approve...	Send to Vendor...	Send to Catalog	Delete	Print
	PO Number	Lines	Vendor Account	Status	Total Funded		
+	573	1	Amazon	completed	\$10.00		
+	571	79	BT-PRINT	open	\$0.00		
+	568	21	INGRAM-PRINT	approved	\$387.46		
+	567	25	Amazon	approved	\$459.13		
+	566	18	Random House LP	approved	\$396.75		
+	565	8	Midwest Tape	acknowledged	\$355.92		
+	564	3	Midwest Tape	acknowledged	\$129.96		

PO Line Statuses

- **Open:** A status of *Open* is assigned when a PO Line is first created. If the PO Line is not fully funded, the PO Line displays in red. If it is fully funded, then it will display in green. “Fully funded” means that all PO Line Copies attached to the PO Line have a fund account assigned.

Lines									
	Charges	Notes	EDI						
	New...	Edit	Apply Template	Fill-In Search	Send to Catalog	View...	Cancel	Delete	F
	Title	Author	ISBN	# C	List Pri.:	Discount.:	Status		
+	Akin : a novel	Donoghue, ...	9780316491990 (I...	1	\$28.00	\$16.80	open		
+	All the flowers i...	Jio, Sarah, ...	9781101885055 (I...	0	\$27.00	\$16.20	open		

- **Completed:** A status of *Completed* is assigned after all of the PO Line Copies on the PO Line have been both received and invoiced, meaning that all items were physically received by the library and the money for all PO Line Copies has been expended. The PO Line displays in blue.

Lines		Charges	Notes	EDI			
New...	Edit	Apply Template	Fill-In Search	Send to Catalog	View...	Cancel	Delete
+	Title	Author	ISBN	#	List Pri.:	Discount.:	Status
+	The hunger g...	Collins, Su...	05453105...	1	\$10.00	\$10.00	completed

PO Line Copies

- **Expected:** A status of *Expected* is assigned when the PO Line Copy is first created. The status will remain as Expected until the physical item is received by the library and marked as Received in GetIt.
- **Received:** A status of *Received* is assigned when the PO Line Copy is marked Received in GetIt, because it has been physically received by the library.

Copies		Notes				
New	Edit	Receive	Unreceive	Send to Catalog	View...	Delete
+	Seq#	Location	Fund	Status		
+		DVD ADULT FEA..	DVD \$29.99	Received		
+		DVD ADULT FEA..	DVD \$29.99	Expected		

C. CREATING PURCHASE ORDERS

Instructions for creating a new Purchase Order is below:

1. On the left side of the page, under **Dashboard**, click the **Purchase Orders** link.
2. A new tab will open in GetIt. The tab will be labeled **Orders**.
3. If the **Orders** tab is not active, click on it to make it the active tab.
4. Click the **New** button. Fill in the fields as follows:
 - a. **Vendor Account:** Click on the drop-down box and select the appropriate Vendor Account. Alternatively, you can begin typing the correct Vendor Account, and GetIt will search for matching Vendor Accounts.
 - b. **Purchase Order Number:** You can assign a Purchase Order Number here, or leave the field blank. If you leave it blank, GetIt will assign a Purchase Order Number for you (in sequential order). Please do not use any punctuation or spaces in your Purchase Order Number. Note that some EDI vendors may not handle long purchase order numbers. It is advisable to limit the PO number to 20 characters.



- c. **Order Type:** You can leave this field blank. If you wish to select an Order Type, note that Order Types are for informational purposes only. (Note: Consult Section V Standing Orders before selecting an Order Type of Standing Orders).
- d. Click the **Save** button when you are finished.

D. CREATING PURCHASE ORDER LINES

Each Purchase Order must contain at least one Purchase Order Line. There are three ways to create PO Lines in GetIt: 1) uploading records from a vendor file of MARC records, 2) using the “from search” feature, and 3) manual entry. Out of those three options, uploading records is the most common option used. All three methods are explained below.

Creating PO Lines by uploading file of MARC records

1. Open the appropriate Purchase Order by highlighting the PO and clicking the **Edit** button or by double-clicking on the PO.
2. After the Purchase Order is open, click the **New** button and choose **Upload MARC**.

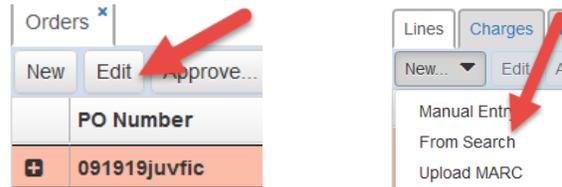


3. In the pop-up box, click the **Browse** button. A Windows pop-up will appear that you will use to navigate to the file of records to upload.
4. Navigate to the folder where the file is stored, and select the correct file. The filename will appear in the **File Name** box. Then click the **Open** button. The filename should now appear in the **Upload Records** box. Verify that the correct filename is listed.
5. In the drop-down box for *Default Create Item On Receipt setting for any 95x copies*, the default will be **No**. Do not change this to Yes, unless your vendor account is specifically set up for “Enriched EDI” (see Electronic Ordering via EDI below for more information).

- Click the **Upload** button. Each record the file of MARC records is then added as a PO Line.

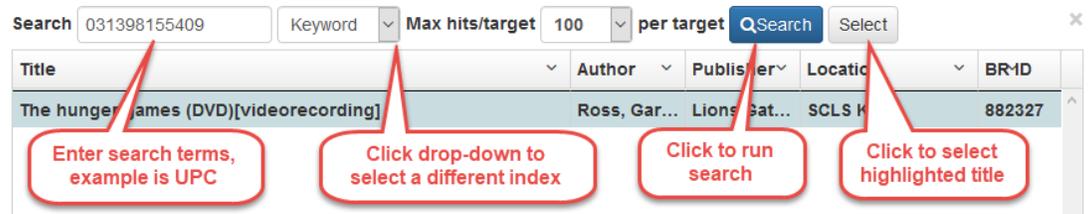
Creating PO Lines by using the “from search” feature

- Open the appropriate Purchase Order by highlighting the PO and clicking the **Edit** button or by double-clicking on the PO.
- After the Purchase Order is open, click the **New** button and choose **From Search**.



- In the pop-up box, enter your search terms into the **Search** box. To change the search index, click on the drop-down next to the search box, and select the appropriate index.
- Click the **Search** button to run the search.
- The list of matching bib records will appear. If you highlight a title, then a preview will appear below, in the Preview box (note that the Preview displays in MARC view).

- To choose a title, highlight the title and click the **Select** button.



- The bib information will be used to create a PO Line. The PO Line will be automatically linked to the Bibliovation bib record (see *Searching and Linking PO Lines* below for more information).

- Enter the pricing into the PO Line:

- List Price:** Fill in the list price of your title.
- Discount %:** Enter a discount percentage if it’s different from the default Vendor Account discount.
- Discounted Price:** This will be calculated automatically based on the list price and discount. (You can also type in a price manually).
- Vendor %:** If there is a discount in the Vendor account, this discount will be filled in automatically.

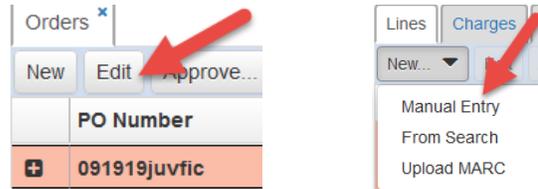
- You must click the **Save** button to save the new PO Line, along with the price information.



Creating PO Lines using manual entry

- Open the appropriate Purchase Order by highlighting the PO and clicking the **Edit** button or by double-clicking on the PO.

2. After the Purchase Order is open, click the **New** button and choose **Manual Entry**.



3. A new tab will open in GetIt. The tab will be labeled **New POL**.
4. Instructions for entering information into the PO Line form is below. Please note that the same guidelines that are used for entering BSE records should be used to manually enter a PO Line. *See the appropriate format section of the Linking Manual for detailed information.*

- a. **Title:** Enter the complete title of your item. Include subtitles and the GMD ([sound recording], (DVD) [videorecording], etc.).
- b. **Author:** Enter the author's name, if applicable. Enter the author name in the format lastname, firstname.
- c. **ISBN:** Fill in the ISBN for your title, if one is available.
- d. **ISSN:** If your title is a serial, fill in the ISSN.
- e. **UPC:** Enter the UPC code (if you have one)
- f. **Publisher:** Enter the publisher name.
- g. **Pub. Date:** Enter the publication date.
- h. **Volume Part:** Enter the number of volumes, if your title is a multi-part item. For annual titles, enter the year.
- i. **Edition:** Enter the appropriate format code for your item. If there is any other edition information, first enter the format code, and then enter the edition information (e.g. **bks; large print**).
 - i. Books: **bks**
 - ii. Book/CD kts: **bk/cd**
 - iii. Compact Discs: **cd**
 - iv. Videorecordings (DVDs and Blu-ray): **vid**
 - v. Software: **sft**
 - vi. Annuals: **ann**
- j. **Description:** Enter the collation for the item (23 pages ; 10 sound discs (12.5 hours))
- k. **List Price:** Fill in the list price of your title.
- l. **Discount %:** Enter a discount percentage if it's different from the default Vendor Account discount.
- m. **Discounted Price:** This will be calculated automatically based on the list price and discount. (You can also type in a price manually).
- n. **Vendor %:** If there is a discount in the Vendor account, this discount will be filled in automatically.
- o. **Prepaid:** Check if appropriate. *Note: If you check the Prepaid box, then funds will be expended, rather than encumbered, when you approve the PO.*
- p. **Rush:** Check if appropriate.
- q. **Backorder OK:** This box should be checked.

- r. **Manufacturer #:** Enter a music or video number here.
- s. All other fields not mentioned above can remain blank.
- t. Click the **Save** button when finished. See example below.

The screenshot shows a web form for creating a Purchase Order (PO) line. At the top, there are tabs for 'Orders', 'PO 091919juvfic', and 'New POL'. Below the tabs is a navigation bar with buttons: Save, Apply Template, Fill-In Search, Send to Catalog, View..., Cancel, Print, Prev, and Next. The form fields are organized into several sections:

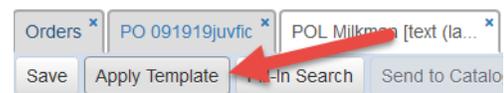
- Title:** Milkman [text (large print)]
- Author:** Burns, Anna
- Order Type:** (Dropdown menu)
- OCLC:** (Empty field)
- EAN13:** (Empty field)
- Status:** (Greyed out field)
- ISBN:** 978143286329
- ISSN:** (Empty field)
- Cancel Reason:** (Dropdown menu)
- Cancel:** (Button)
- ISMN:** (Empty field)
- UPC:** (Empty field)
- Biblio ID:** (Empty field)
- Subscription ID:** (Empty field)
- Publisher:** Thorndike Press
- Order Line Ref:** (Empty field)
- Issue ID:** (Greyed out field)
- Pub. City:** (Empty field)
- List Price:** 40.00
- Discount %:** 15
- Pub. Date:** 2019
- Discount Price:** 34.00
- Vendor %:** (Greyed out field)
- Binding:** (Empty field)
- Prepaid:**
- Rush:**
- Volume Part:** (Empty field)
- Backorder OK:**
- Backordered:**
- Edition:** bks ; large print
- Manufacturer #:** (Empty field)
- Supplier #:** (Empty field)
- Description:** 591 pages

E. ADDING PURCHASE ORDER LINE COPIES TO PO LINES

After you have created a PO Line, you must add one or more Purchase Order Line Copies for each PO Line. PO Line Copies represent the actual item you are ordering. PO Line Copies can be added by applying Templates (the most common method), or they can be created manually. Instructions for both methods are below.

Adding PO Line Copies using Templates

1. From the list of PO Lines, highlight the PO Line for which you are adding Copies and click the **Edit** button. (You can also double-click on the PO Line to edit it).
2. Click the **Apply Template** button.
3. The Select Templates pop-up box will appear. Click on the correct Template to highlight it, and click the **Select** button to choose a Template. You can also search for a template using the search box.
4. One or more PO Line Copies will be added to the PO Line (the number of PO Line Copies added is set in the Template). The PO Line Copy will appear in the Copies tab at the bottom of the PO Line screen.



Select Template

Search adult

Name	Copies	Created Date
FIC ADULT	1	1/16/2014
Holiday Fund Book - Adult	1	4/9/2014
NF ADULT	1	1/27/2014
SCA ADULT FIC	1	9/3/2019

Copies Notes

Seq#	Location	Fund	Status
1	BOOK ADU...	Adult Fictio...	Expected

- To add an additional PO Line Copy to the PO Line, click the **Apply Template** button again.

Creating PO Line Copies manually

- From the list of PO Lines, highlight the PO Line for which you are adding Copies and click the **Edit** button. (You can also double-click on the PO Line to edit it).
- Under the Copies tab, click the **New** button.
- A pop-up box will appear, labeled **New PO Line Copy**.
- Fill in the fields as follows:
 - Received?** Do not check.
 - Create on Receipt?** Do not check.
 - Expected:** Leave blank.
 - Location:** Click on the drop-down box and choose the correct Location. Alternatively, you can enter a Location into the box and GetIt will search for matching Locations.
 - Fund:** Click on the drop-down box and choose the correct Fund. Alternatively, you can enter a Fund into the box and GetIt will search for matching Funds. Or, you can click on the **tree** icon to view the fund hierarchy and select a fund.
 - Amount:** Will be automatically filled in.
 - Item ID and Copy ID:** Leave blank.
 - Staff Note:** *Optionally*, enter an internal staff note. This note will only appear in GetIt.
 - Vendor Note:** Leave blank.
 - Click the **Save** button when finished. See example below.



New PO Line Copy ×

Copy Price: 19.99, Total Funded: 19.99 (fully funded)

Status Received? Create on Rcpt? Expected

Location

Fund Amount

Item ID Copy ID

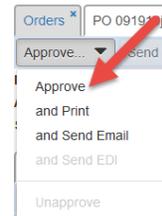
Staff Note

Vendor Note

F. APPROVING PURCHASE ORDERS

After all of the PO Line Copies have been fully funded, the PO is ready for approval. Approving the PO will encumber funds. (NOTE: If the *Prepaid* box in a PO Line is checked, then funds will be expended, rather than encumbered, for that PO Line). Instructions for approving POs are below:

1. Open the appropriate Purchase Order by highlighting the PO and clicking the **Edit** button or by double-clicking on the PO.
2. Click on the **Approve** button and select **Approve**.
3. The PO will be approved. A small pop-up box will briefly appear in the upper right-hand corner noting that the PO was approved.
4. Note: In the Approve menu, there is an option to Unapprove the PO. You can use this feature, if, after approving the PO, you wish to make a change to the PO. **However, do not Unapprove POs that have already been sent to the Vendor via EDI. Also, do not Unapprove POs that have PO Line Copies that have already been Received and Expended.** To unapprove POs, do the following:
 - a. Open the PO and go to **Approve>Unapprove**.
 - b. The PO will change to **open** status.
 - c. Make the appropriate changes.
 - d. Go to **Approve>Approve** to approve the PO again and encumber funds.

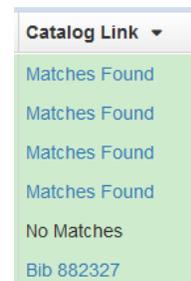


G. SEARCHING AND LINKING PO LINES

After the PO has been approved, you may send the PO to the catalog, which will create BSE records and/or on order items. However, before sending to the catalog, you must search and link the PO Lines to the appropriate bib records in Bibliovation. This will ensure that your library's on order items appear on the correct bib records and will prevent duplicate bib records from being created. In order to search and link PO Lines in GetIt, staff must be trained in the searching and matching rules, by reviewing the Linking Manual and by watching the Linking I tutorials. Instructions for searching and linking PO Lines are below.

Reviewing the Catalog Link column

1. Open the appropriate Purchase Order by highlighting the PO and clicking the **Edit** button or by double-clicking on the PO.
2. Go to the **Catalog Link** column on the right-hand side of the screen.
3. In the Catalog Link column, you will see records labeled with one of the following: Matches found, Bib nnnnnn, or No Matches.
 - a. **Bib nnnnnn**: These bibs have already been linked to a bib record.
 - b. **Matches found**: This means that the ISBN in the PO Line matches an ISBN in at least one bib record in Bibliovation.
 - c. **No Matches**: This means that there is either no ISBN in the PO Line record or that the ISBN does not match any ISBNs in the catalog. You will have to search the catalog separately to determine if there is a match.



Linking PO Lines with the Matches Found link

1. Click on the **Matches found** link. A box will pop up with one or more matches. To view the bib record, click the **Bib nnnnnn** link in the **Link** column.

2. The bib record will open in another browser tab.
3. Review the bib record to be sure that it actually matches the title that is on order. Follow the Linking rules for the appropriate format, checking the title, author, translators, illustrators, etc. to be sure that the record is the correct match.
4. If the record is a match, go back to the GetIt browser tab, make sure that the correct line is highlighted, and click the **Select** button to select the title and link the PO Line to the bib record.
 - a. In the PO, the Matches found link will change to a **Bib nnnnnn** link.
5. If the bib record is not a match, follow the instructions below for *Linking PO Lines with No Matches*.
6. Close the additional browser tabs that were opened.

Catalog Matches

Double-click on a row to select a match

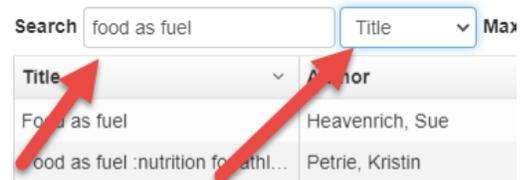
Title	Bib ID	Link
Flying snake /	1406378	Bib 1406378

Linking PO Lines using the Fill-in Search button

1. Open the appropriate PO Line. Click the **Fill-in Search** button in the top toolbar.
2. A search box will appear and the PO Line's ISBN will be automatically filled in. GetIt will automatically search the ISBN. This is the same type of search used when you add a PO Line using the **From Search** option.
3. If there is an ISBN match, highlight the appropriate line and review the bib record information in the lower part of the box.
 - a. If the record matches, then click the **Select** button to link the PO Line to the bib record.



- a. Click the **Save** button in the PO Line to save the change (if you close the PO Line without saving, then the bib record link will not be saved).
4. If there is no ISBN match, you can remove the ISBN from the search box and enter the title and/or author instead. You must change the search index to search by title and/or author. Click the **Search** button to run the new search.
 - a. If you get a possible match(es), highlight the appropriate line and review the bib record information in the lower part of the box.
 - b. If the record matches, then click the **Select** button to link the PO Line to the bib record. Click the **Save** button in the PO Line to save the change (if you close the PO Line without saving, then the bib record link will not be saved).



- a. If you get a possible match(es), highlight the appropriate line and review the bib record information in the lower part of the box.
 - b. If the record matches, then click the **Select** button to link the PO Line to the bib record. Click the **Save** button in the PO Line to save the change (if you close the PO Line without saving, then the bib record link will not be saved).
5. If there are no matches, then move on to the next section, Linking PO Lines with No Matches.

Linking PO Lines with No Matches

1. Open Bibliovation in a new browser tab. In the new browser tab, search for your item by ISBN or UPC (if available). If there is no ISBN or UPC match, you must also search by title (and author if

necessary) to determine whether Bibliovation has a matching bib. Follow the Linking rules for the appropriate format to determine if any bib records are matches for your PO Line.

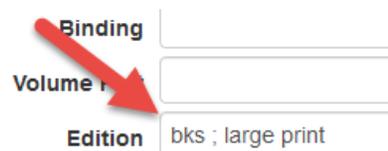
2. If you find a match, then you can link the PO Line in GetIt to the Bibliovation bib record. You will do this by adding the bib number from Bibliovation to the PO Line.
3. To find the bib number in Bibliovation, click on the **MARC** tab of the bib record. At the top of the record, you will see the heading **MARC biblio : [number]**.
The number following the colon is the Bibliovation biblionumber. Copy the Bibliovation biblionumber (select it, right-click and choose **Copy**).
4. Open the PO Line in GetIt, and paste the Bibliovation biblionumber into the **Biblio ID** field (right-click in the field, and select **Paste**).
5. Click the **Save** button to save PO Line. The PO Line is now linked to the Bibliovation bib record.



Order Type	
Status	open
Cancel Reason	
Biblio ID	1419476

Handling PO Lines with no matching bib record

1. There will be situations where there is no matching bib record in Bibliovation. In this case, the PO Line will remain unlinked until it is sent to the catalog.
2. Sending an unlinked PO Line to the catalog will create a BSE record in Bibliovation. Before sending to catalog, open the PO Line, and enter the appropriate format code in the Edition field:
Note: If there is any other edition information, first enter the format code, and then enter the edition information (e.g. **bks**; **large print**).
 - a. Books: **bks**
 - b. Book/CD kts: **bk/cd**
 - c. Compact Discs, Digital Audio Players, and Vinyl: **cd**
 - d. Videorecordings (DVDs and Blu-ray): **vid**
 - e. Software: **sft**
 - f. Annuals: **ann**
3. Click the **Save** button to save the PO Line.



Binding	
Volume	
Edition	bks ; large print

H. SENDING PO LINES AND PO LINE COPIES TO THE CATALOG

After you have searched and linked the PO Lines in your PO, you can use Send to Catalog to 1)create on order item records for those PO Lines that are linked to a matching bib record, and 2)create GetIt BSE records (and on order item records) for those PO Lines that do not have a matching bib record.

NOTE: Not every PO Line should be sent to the catalog as a GetIt BSE. Certain types of items do not go into the catalog until you have received the item and can link it to the correct bib record with the item-in-hand. Adding certain types of items to the catalog at the point of order can cause complications with patrons placing holds. **Do not send the following types of items to the catalog at the point of order:**

- Generic materials
- Rental items

- Multi-part items that are circulated separately (such as non-fiction TV series)
- Local materials
- Serials
- Computer software

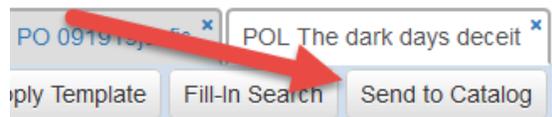
You may want to consider placing the items above on separate POs, so they are not accidentally sent to the catalog.

Sending individual PO Lines to the catalog

Instructions for sending individual PO Lines to the catalog are below:

1. Open the appropriate PO Line by highlighting the PO Line and clicking the Edit button or by double-clicking on the PO Line.

2. In the toolbar, click the **Send to Catalog** button.



- a. Note: If the PO Line is already linked to the bib record, then an on order item record will be added to the linked bib record. If the PO Line is not linked to the bib record, then a GetIt BSE record will be created, along with an on order item record.
3. You will receive a pop-up message asking: "Do you want to suppress this record from being entered into the public OPAC?" Click **No** so the record will not be suppressed from the public catalog.
 4. A small pop-up box will briefly appear in the upper right-hand corner noting that the PO Line was sent to the catalog. The pop-up box will disappear on its own.
 5. The PO Line and PO Line Copy will be updated with the appropriate bib and item numbers.
 - a. If a GetIt BSE record was created, the new bib number will appear in the **Biblio ID** field.
 - b. In the PO Line Copy(ies), the Item number will appear in the Catalog Link field of the PO Line Copy(ies).

Seq#	Location	Fund	Status	Create I..	Notes	Catalog Link
1	BOOK JUV FIC	Juv Books \$19.99	Expected	No	This is a staff note.	Item 6183150

6. After you are finished sending to catalog, the **Send to Catalog** button will remain active. However, unless you manually un-link the bib and/or item record from the PO Line and/or PO Line Copy, clicking the button again will not re-send to the catalog. (See "I" below for information on manually un-linking.)

Sending entire PO to the catalog

If all PO Lines on the can be sent to the catalog, you can send all PO Lines at once from the PO, instead of sending each PO Line individually. Instructions for sending the entire PO to the catalog are below:

1. Open the appropriate Purchase Order by highlighting the PO and clicking the **Edit** button or by double-clicking on the PO.

2. In the toolbar, click the **Send to Catalog** button.



- a. Note: If the PO Lines in the PO are already linked to the bib record, then on order item records will be added to the linked bib records. If the PO Lines are not linked to the bib record, then GetIt BSE records will be created, along with on order item records.
3. You will receive a pop-up message asking: "Do you want to suppress this record from being entered into the public OPAC?" Click **No** so the record will not be suppressed from the public catalog.
4. A small pop-up box will briefly appear in the upper right-hand corner noting that the PO was sent to the catalog. The pop-up box will disappear on its own.
5. The PO Lines and PO Line Copy(ies) will be updated with the appropriate bib and item numbers.
 - a. If GetIt BSE records were created, the new bib number will appear in the Catalog link field.
 - b. In the PO Line Copy(ies), the Item number will appear in the Catalog Link field of the PO Line Copy(ies).
6. You can view both of the bib and item numbers from the main PO screen by clicking on the + (plus) sign next to the PO Line. The PO Line Copies will appear under the PO Line.

Title	Author	ISBN	# C	List Price	Discounted	Type	Status	Notes	Created	Owner	Catalog Link
Come November	van Dam, Katrin (W...	9781338268423 (IS...	2	\$18.99	\$18.99		open		9/20/2019	reels	Bib 1442876
Seq#	Location	Fund	Received?	Create I..	Status	Notes	Catalog Link	Do			
1	BOOK ADULT FIC	Adult Fiction \$18.99	Expected	No	Open		Item 6183155				

7. After you are finished sending to catalog, the **Send to Catalog** button will remain active. However, unless you manually un-link the bibs and/or item records from the PO Lines and/or PO Line Copies in the PO, clicking the button again will not re-send to the catalog. (See "I" below for information on manually un-linking.)

I. UN-LINKING PO LINES AND PO LINE COPIES

Occasionally you may need to "un-link" or disconnect a PO Line and/or PO Line Copy from a bib record and/or item record in Bibliovation. Instructions for un-linking are below:

Unlinking a bib record from a PO Line

1. Open the appropriate PO Line.
2. In the **Biblio ID** field, delete the existing bib number.
3. Click the **Save** button on the PO Line header to save the changes.
4. The PO Line will no longer be linked to the bib record in Bibliovation. If the PO Line Copy(ies) were linked to item record(s) on the bib record, then the item record link(s) will be removed as well.
5. NOTE: The bib record that was linked will not affected by removing the bib number from the PO Line.

Unlinking an item record from a PO Line Copy

1. Open the appropriate PO Line.

- At the bottom of the screen, in the **Copies** tab, click on the appropriate PO Line Copy to highlight it, and click the **Edit** button.
- The **Update PO Line Copy** pop-up box will appear.
- In the **Item ID** field, remove the existing item number.
- Click the **Save** button to save the changes.
- The PO Line Copy will no longer be linked to the item record in Bibliovation. The **Catalog Link** column will display **No link**.
- NOTE: The item record that was linked will not be affected by removing the bib number from the PO Line.

J. **ELECTRONIC ORDERING VIA EDI**

Before you can order via EDI, the Vendor must make your account “EDI-enabled” and SCLS staff must do setup in GetIt. Contact your vendor and SCLS staff to get started.

There are a couple of ways to send a PO to the vendor via EDI:

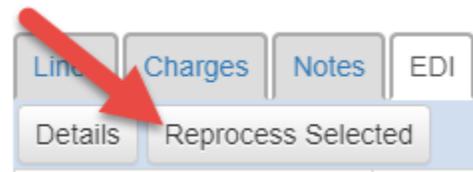
- When you approve a PO, click on the **Approve** button and choose **and Send EDI**.
- If the PO is already approved, click on the **Send to Vendor** button and choose **Send EDI**.
- To find information about the EDI transaction, click the **EDI** tab.



- If the **Status** of the Purchase Order says “Failed” or “Rejected” then there was a problem with the transaction. It is likely that the order did not go through. In that case, contact your vendor to confirm that the vendor did not receive the order.
- If the vendor did not receive the order, review the order to be sure that there is an ISBN or UPC in every PO Line. If the order appears to be correct, try sending the order. Click on the **850/Purchase Order** line to highlight it, and click the **Reprocess Selected** button.
- If the order continues to fail, report the problem via the SCLS Help Desk Portal.



- After an EDI order is successfully received by a vendor, the vendor will send an EDI Acknowledgement that will be automatically loaded into GetIt. You will know when the EDI Acknowledgement has been received because the status of the PO will change to Acknowledged, and the PO will turn yellow. Also, the **Vendor Notes** field will note whether the item will be shipping, has been cancelled, or has been backordered. Each vendor may have slightly different notes.
- The EDI Acknowledgement should be delivered within 24 hours maximum. To find information about the status of the EDI Acknowledgement, click the **EDI** tab.



- a. If GetIt picked up an EDI Acknowledgement, there will be a line labeled **855/PO Acknowledgement**. Normally the status will be Processed, which means that the EDI Acknowledgement was processed and loaded by GetIt.
- b. If the status says “Failed” or “Rejected” then there was some kind of problem with the Acknowledgement. Click on the **855/PO Acknowledgement** to highlight it, and click the **Reprocess Selected** button. GetIt will reprocess the file and attempt to load it into the PO again. In some cases, this will fix the problem.
- c. If reprocessing the EDI Acknowledgement does not work and the status continues to display “Failed” or “Rejected” report the problem via the SCLS Help Desk Portal.
- d. Also, if you do not receive an EDI Acknowledgement within 24 hours of sending the order, report the problem via the SCLS Help Desk Portal.

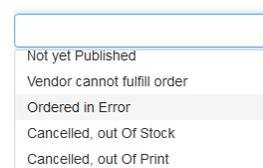
K. CANCELLING A PO LINE

Occasionally, you may need to cancel a PO Line. Canceling a PO Line will un-encumber funds associated with the PO Line. **NOTE: you should not delete a PO Line from an approved PO – doing this may not un-encumber the funds.** Instructions for canceling a PO Line are below.

1. Open the appropriate PO Line by highlighting the PO Line and clicking the Edit button or by double-clicking on the PO Line.
2. In the toolbar, click the **Cancel** button.
3. The **Cancel/Close PO Line** pop-up will display. Click on the drop-down menu and select a reason for closing the PO Line.
4. Click the **Cancel/Close PO Line** button.
5. The status of the PO Line will change to **cancelled**. The funds associated with the PO Line will be un-encumbered.



Cancel/Close PO Line



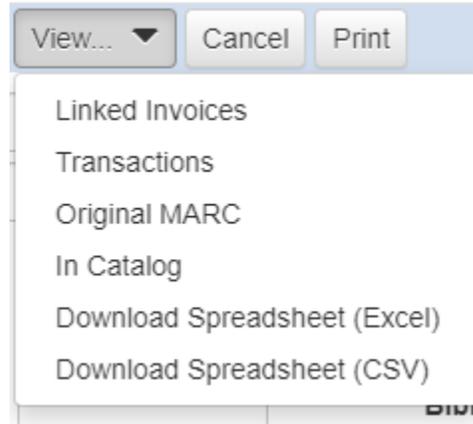
Lines		Charges	Notes	EDI				
New...		Edit	Apply Template	Fill-In Search	Send to Catalog	View...	Cancel	Delete
Title	Author	ISBN	#	List Price	Discounted	Type	Status	
Flying snake	Canasi, Brittany	9781641566100 (IS...	1	\$9.95	\$9.95		cancelled	

6. NOTE: Canceling a PO Line will not remove any associated BSEs and on order item records from Bibliovation. **You must manually delete on order item records in Bibliovation if an order is cancelled.**

L. USING THE PO LINE VIEW BUTTON

The View button of the PO Line has several options. The different options are explained below.

1. **Linked Invoices:** Will display a pop-up box that shows any invoices associated with the PO Line Copy(ies). If the Copy(ies) hasn't been invoiced, then the Copy(ies) will display, with (not invoiced) in the Invoice # column.
2. **Transactions:** Will display a pop-up box that shows any transactions associated with the PO Line Copy(ies), such as PO approvals.
3. **Original MARC:** A pop-up will appear that contains the original MARC data used to create the PO Line. If the PO Line was created using a vendor MARC record, then the vendor MARC will appear. If the PO Line was created using the "from search" option, then the MARC data from the Bibliovation bib record will appear. If the PO Line was not created using a MARC record, then the Original MARC option will be grayed out.
4. **In Catalog:** The linked bib record will open in a new browser tab. If the PO Line does not have a linked bib record, then the In Catalog option is grayed out.
5. **Download Spreadsheet (Excel):** Not available
6. **Download Spreadsheet (CSV):** Not available



M. PRINTING PO LINES AND PO LINE COPIES

1. The Print button of the PO Line will print both the PO Line and PO Line Copy information. See instructions below.
2. Open the PO Line to be printed, and in the PO Line toolbar, click the **Print** button.
3. A printable view will open in a new browser tab. The printable view will display all fields from the PO Line in addition to all fields from all PO Line Copies on the PO Line.
4. The printer dialog box will automatically display. Click **Print** to print the document. The new browser tab will automatically close.

