

# Purchase Orders

This chapter describes how to create, activate, and receive purchase orders in the Acquisitions module. Other functions related to purchase orders are also covered.

## Anatomy of a Purchase Order

1. Purchase Order Information
2. Actions Menu
3. Batch Updater
4. Line Items
5. Direct Charges

Purchase Order (pending)

ID 1545

Name 1545

Provider Baker (Baker)

Total LineItems 2

Total Estimated \$58.95

Total Encumbered \$0.00

Total Spent \$0.00

Split Order by LineItems

Prepayment Required? No

Activatable? Yes. [Activate Order](#) / [Activate Without Loading Items](#)

Notes (0)

EDI Messages (0)

History [View](#)

Allow activation with zero-copy lineItems ☐

PO Information

--Actions--

Action Menu

Copies

Owning Branch

Copy Location

Collection Code

Fund

Circ Modifier

Distribution Formula

Apply to Selected

Batch Updater

Line Items

Expand All

Items

Notes

Actions

Status

Estimated Price

Sycamore Row / John Grisham

Grisham, John. 9780385537131 First edition 2013 Random House Inc Baker

Order Identifier ISBN 9780385537131

# 64075 | 0 | [catalog](#) | [worksheet](#) | [requests](#) | [view invoice\(s\)](#) | [queue](#)

Expand

Copies(1)

Notes(0)

-- Actions --

Pending-Order

28.95

The goldfinch / Donna Tartt

Tartt, Donna. 9780316055437 First Edition. 2013 Little Brown & Co Baker

Order Identifier ISBN 9780316055437

# 64078 | 0 | [catalog](#) | [worksheet](#) | [requests](#) | [view invoice\(s\)](#) | [queue](#)

Expand

Copies(1)

Notes(0)

-- Actions --

Pending-Order

30.00

Direct Charges, Taxes, Fees, etc.

There are no miscellaneous attached to this purchase order.

New Charge

Save New Charges

Direct Charges

Click to enlarge

## Purchase Order Information

### View History

The history of a specific purchase order can be viewed in two ways.

1. Open a purchase order.
2. In the top half of the purchase order, beside *History*, click the hyperlinked *View*.

Purchase Order (received) Activated 4/1/14 2:30 PM

ID 55      Prepayment Required? No

Name [55](#)      Activatable? Activated

Provider [Midwest Tapes \(Midwestft\)](#)      Notes [\(0\)](#)

Total Lineitems 1      EDI Messages [\(1\)](#)

Total Estimated \$22.35      History [View](#)

Or, using the main *Actions* menu, select *Actions*→*View PO History*.

3. The history of the purchase order will display. Use the column headers to sort.

#### Purchase Order History

[Back](#) [Next](#) [Filter](#)

✓	#	Audit Time	Name	State	Ordering Agency	Provider	Create Time	Edit Time	Order Date	Creator	Editor	Owner	Cancel Reason	Prepayment Required
<input type="checkbox"/>	1	1/21/15 1:09 PM	55	on-order	66	Midwestft	4/1/14 2:28 PM	1/6/15 3:59 PM	4/1/14 2:30 PM	1	3762439	1		False
<input type="checkbox"/>	2	1/6/15 3:59 PM	55	received	66	Midwestft	4/1/14 2:28 PM	8/21/14 1:41 PM	4/1/14 2:30 PM	1	3762439	1		False
<input type="checkbox"/>	3	8/21/14 1:41 PM	55	on-order	66	Midwestft	4/1/14 2:28 PM	4/1/14 2:30 PM	4/1/14 2:30 PM	1	1	1		False
<input type="checkbox"/>	4	4/1/14 2:30 PM	55	pending	66	Midwestft	4/1/14 2:28 PM	4/1/14 2:28 PM		1	1	1		False

## Purchase Order Notes

You can add notes to a purchase order. Notes can be viewed by staff and/or the provider. By default, notes are visible only to staff.

1. Open a purchase order.
2. In the top half of the purchase order there is a *Notes* field. The number of notes attached to the purchase order is hyperlinked in parentheses next to this field. Click the hyperlinked number.

Purchase Order (pending)

ID 104      Prepayment Required? No

Name [NameYourPurchaseOrder](#)      Activatable? No: The requ

Provider [TestVendor1 \(TV1\)](#)      Notes [\(0\)](#)

Total Lineitems 1      EDI Messages [\(0\)](#)

Total Estimated \$13.11      History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

3. Click *New Note*.

4. Enter the note. There is an option to make it available to the provider, however <font inherit/inherit;;inherit;;#ffff99>PINES does not send notes to vendors</font> so do not check the box

adjacent to *Note is vendor-public*. [link] [check if this is true]

Purchase Order (pending)

ID 104      Prepayment Required? No

Name [NameYourPurchaseOrder](#)      Activatable? No: T

Provider [TestVendor1 \(TV1\)](#)      Notes (0)

Total Lineitems 1      EDI Messages (0)

Total Estimated \$13.11      History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems ☐

[Return](#)      [New Note](#)

Example Note

☐ Note is vendor-public

[Create](#)

5. Click *Create* and your note will appear. Repeat the process to add as many notes as you require.

Purchase Order (pending)

ID 104      Prepayment Required? No

Name [NameYourPurchaseOrder](#)      Activatable? No: T

Provider [TestVendor1 \(TV1\)](#)      Notes (1)

Total Lineitems 1      EDI Messages [View](#)

Total Estimated \$13.11      History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems ☐

[Return](#)      [New Note](#)

1. Example Note      7/26/16 5:33 PM [Delete](#)

6. Click *Return* to return to the purchase order.

7. The number of notes in the hyperlinked parantheses next to the Notes field will increase to reflect the number of notes attached to the purchase order.

<b>Purchase Order (pending)</b>	
<b>ID</b> 104	<b>Prepayment Required?</b> No
<b>Name</b> <a href="#">NameYourPurchaseOrder</a>	<b>Activatable?</b> No: T
<b>Provider</b> <a href="#">TestVendor1 (TV1)</a>	<b>Notes</b> <a href="#">(1)</a>
<b>Total Lineitems</b> 1	<b>EDI Messages</b> <a href="#">View</a>
<b>Total Estimated</b> \$13.11	<b>History</b> <a href="#">View</a>
<b>Total Encumbered</b> \$0.00	
<b>Total Spent</b> \$0.00	

### Split Purchase Order by Line Items

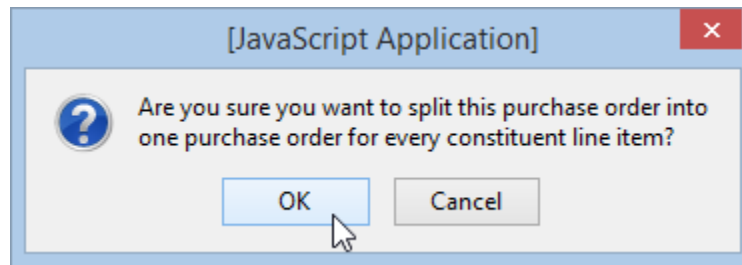
You can create a purchase order with multiple line items and then split the purchase order so that each line item is on a separate purchase order.

When a purchase order is in the status of *pending*, a link to *Split Order by Lineitems* appears in the bottom left corner of the top half of the screen.

1. Open the purchase order you would like to split.
2. Click *Split Order by Lineitems*.

<b>Purchase Order (pending)</b>	
<b>ID</b> 67	
<b>Name</b> <a href="#">67</a>	
<b>Provider</b> <a href="#">TestVendor1 (TV1)</a>	
<b>Total Lineitems</b> 10	
<b>Total Estimated</b> \$144.00	
<b>Total Encumbered</b> \$0.00	
<b>Total Spent</b> \$0.00	
<a href="#">Split Order by Lineitems</a>	

3. A pop-up box will confirm that you wish to split the purchase order. Click OK to continue.



4. The line items will display with a PO search.

5. Select *Pending* from the *State* drop down menu. Leave *Show results as a virtual combined PO* checked and click *Search*.

A form titled "PO Search" with a light blue header bar. Below the header, there are four input fields: "ID", "Provider", "State", and "Ordering Agency". The "State" dropdown menu is open, showing options: "New", "In Process", "Pending", and "On order". A checkbox labeled "Show results as a virtual combined PO" is checked. A "Search" button is located to the right of the "Ordering Agency" field. A mouse cursor is pointing at the "Search" button.

6. All pending orders will appear as a virtual combined purchase order. You are able to activate the purchase order for each item from this screen.



The Virtual combined purchase order is a known bug and does not work. Each PO will appear separately in your purchase order search.

## Actions Menu

### Mark Ready for Selector

This step is optional, but may be useful to some individual workflows.

See [Mark Ready for Selector](#)

### Line Items

See [Line Items](#)

## Creating Purchase Orders

There are three important monetary numbers in every purchase order: Total Estimated, Total Encumbered, and Total Spent.

Total Estimated	\$0.00
Total Encumbered	\$0.00
Total Spent	\$0.00

Total Estimated = Sum of estimated item prices + amount of direct charges  
Total Encumbered = Sum of estimated item prices that have not been paid yet  
Total Spent = Sum of invoiced amounts on invoices associated with this PO

When the provider and funds use different currencies:

- Total Estimated is calculated in the currency of the provider
- Total Encumbered is calculated in the currency of the fund
- Total Spent is calculated in the currency of the fund



There is a soft limit of 250 items (copies) on purchase orders. If the resulting invoices have more than 250 items, there become issues with printing and EDI orders may fail.

## Create a Purchase Order from Line Items

The following instructions apply if you are creating a purchase order while using Catalog IDs or the View/Place Order link from the Actions for the Record function in the catalog.

1. Select *Create Purchase Order*.

## Related Lineitems

■

--Actions--

- Actions--
- Save Items To Selection List
- Mark Ready for Selector
- Mark Ready for Order
- Delete Selected Items
- Add Brief Record
- Export Single Attribute List
- PO----
- Create Purchase Order**
- Add to Purchase Order
- Print Purchase Order
- View PO History
- Load Bibs and Items
- Cancel Selected Line Items
- Apply Claim Policy to Selected Line Items
- Mark Selected Line Items as Received
- Un-Receive Selected Line Items
- Create Invoice From Selected Line Items
- Link Selected Line Items to Invoice

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c2007. Brown Dog Books, native-eve

196734

[requests](#)

2. A pop-up box will appear.

Ordering Agency

Name (optional)

Provider

Prepayment Required ☐

All Line Items ☒

Selected Line Items ☐

Import Bibs and Create Copies ☐

3. Select the Ordering Agency from the drop down menu.

4. Enter the code for the Provider. This field will auto-complete as you type.

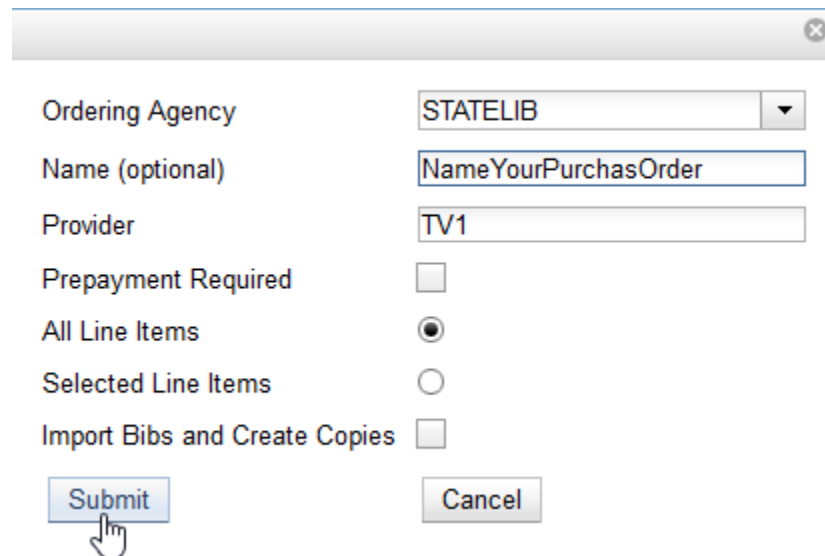
5. If prepayment is required, check the box adjacent to Prepayment Required.

6. Choose to either add *All Line Items* or *Selected Line Items* to the purchase order.

7. Check the box adjacent to *Import Bibs and Create Copies* if you wish to import them at this time. If not previously selected, bibliographic items will be imported and copies created when the purchase order is activated.

If you check this box, the Vandelay interface will appear when *Submit* is clicked. See [How to Load Bibliographic Records and Items into the Catalog \[link\]](#) for instructions.

8. Click *Submit*.



Ordering Agency: STATELIB

Name (optional): NameYourPurchasOrder

Provider: TV1

Prepayment Required: ☐

All Line Items: ☒

Selected Line Items: ☐

Import Bibs and Create Copies: ☐

Submit Cancel

9. Your purchase order will be created, the page will reload and the new purchase order will appear in the same tab.

Purchase Order (pending)

ID 889      Prepayment Required? No

Name [NameYourPurchaseOrder](#)      Activatable? Yes.      [Activate Order](#) / [Activate Without Loading Items](#)

Provider [TestVendor1 \(TV1\)](#)      Notes [\(0\)](#)

Total Lineitems 0      EDI Messages [\(0\)](#)

Total Estimated \$0.00      History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems ☐

[Add Brief Record](#)

#### Direct Charges, Taxes, Fees, etc.

*There are no miscellanea attached to this purchase order.*

[New Charge](#)

[Save New Charges](#)



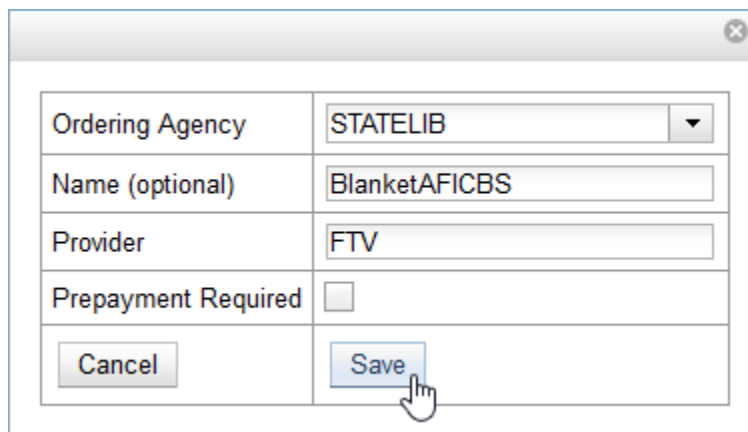
## Blanket Orders

Blanket orders allow staff to invoice an encumbered amount multiple times, paying off the charge over a period of time.

The workflow supported by a blanket order assumes staff does not need to track the individual contents of the order, only the bulk amounts encumbered and invoiced.

**Create a Blanket Order** 1. Select *Acquisitions*→*Create Purchase Order*.

2. A pop-up window will appear. Create the purchase order as normal [link].



Ordering Agency	STATELIB
Name (optional)	BlanketAFICBS
Provider	FTV
Prepayment Required	<input type="checkbox"/>
Cancel	Save

3. Click Save. The purchase order is created and will appear on your screen.

Purchase Order (pending)

ID 645	Prepayment Required? No
Name <a href="#">BlanketAFICBS</a>	Activatable? Yes. <a href="#">Activate Order</a> / <a href="#">Activate Without Loading Items</a>
Provider <a href="#">Fake Test Vendor (FTV)</a>	Notes <a href="#">(0)</a>
Total Lineitems 0	EDI Messages <a href="#">(0)</a>
Total Estimated \$0.00	History <a href="#">View</a>
Total Encumbered \$0.00	
Total Spent \$0.00	
Allow activation with zero-copy lineitems <input type="checkbox"/>	

--Actions--

### Direct Charges, Taxes, Fees, etc.

*There are no miscellanea attached to this purchase order.*

[New Charge](#)

[Save New Charges](#)

4. Go to the Direct Charges line at the bottom of the purchase order and choose New Charge.

Purchase Order (pending)

ID 645

Prepayment Required? No

Name [BlanketAFICBS](#)

Activatable? Yes. [Activate Order](#) / [Activate Without Loading Items](#)

Provider [Fake Test Vendor \(FTV\)](#)

Notes [\(0\)](#)

Total Lineitems 0

EDI Messages [\(0\)](#)

Total Estimated \$0.00

History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems ☐

--Actions--

#### Direct Charges, Taxes, Fees, etc.

There are no miscellanea attached to this purchase order.

New Charge

Save New Charges

5. From the New Charge drop-down choose Blanket Order from the list.

6. Choose a fund from the Fund drop down menu.

7. Enter the Estimated Cost for the blanket order.

8. Click Save New Charges.

Purchase Order (pending)

ID 645

Prepayment Required? No

Name [BlanketAFICBS](#)

Activatable? Yes. [Activate Order](#) / [Activate Without Loading Items](#)

Provider [Fake Test Vendor \(FTV\)](#)

Notes [\(0\)](#)

Total Lineitems 0

EDI Messages [\(0\)](#)

Total Estimated \$0.00

History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems ☐

--Actions--

#### Direct Charges, Taxes, Fees, etc.

Charge Type	Fund	Title/Description	Author	Note	Estimated Cost	
<a href="#">Blanket Order</a>	<a href="#">George (2017)</a>				5,000.00	X
New Charge	Save New Charges					

## 9. Click Activate Order.

Purchase Order (pending)

ID 645

Name [BlanketAFICBS](#)

Provider [Fake Test Vendor \(FTV\)](#)

Total Lineitems 0

Total Estimated \$5000.00

Total Encumbered \$0.00

Total Spent \$0.00

Prepayment Required? No

Activatable? Yes.

Notes [\(0\)](#)

EDI Messages [\(0\)](#)

History [View](#)

Allow activation with zero-copy lineitems ☐

[Activate Order](#) / [Activate Without Loading Items](#)

--Actions--

Direct Charges, Taxes, Fees, etc.					
Charge Type	Fund	Title/Description	Author	Note	Estimated Cost
Blanket Order	George (2017)				5000.00

New Charge

Save New Charges

After a blanket order is activated, multiple invoices can be created to gradually expend funds over a period of time. Alternatively, there is an option to close a blanket order without expending all funds. See [Blanket Order Invoices and Receiving](#) [link] for guidelines.

## Activating Purchase Orders

### Activation Criteria

Before you can activate a purchase order, the following criteria must be met:

#### Each line item must contain an estimated price.

Error: If there is no estimated price, the *Activate Order?* field will read, *No: The lineitem has no price (ACQ\_LINEITEM\_NO\_PRICE)*.

**Activatable?** No: The lineitem has no price (ACQ\_LINEITEM\_NO\_PRICE)

To resolve: Enter prices in the estimated price fields and click *Reload*.

#### Each line item must have at least one copy attached to it.

Error: If there is no copy, the *Activate Order?* field will read, *Activatable? No: The lineitem has no*

attached copies (ACQ\_LINEITEM\_NO\_COPIES) (lineitemID).

**Activatable?** No: The lineitem has no attached copies (ACQ\_LINEITEM\_NO\_COPIES) (

To resolve: Add a copy to the line item. (See: [Add a Copy to a Line Item](#) [link])

In instances where a line item should not have any copies the *Allow activation with zero-copy lineitems* check box may be used.

**Allow activation with  
zero-copy lineitems**



Copies should never be added to line items after a purchase order has already been activated. Copies added to line items after purchase order activation will never be ordered or tracked.

### **Each line item must have funds applied to it.**

Error: If no funds are applied, the *Activate Order?* field will read, *No: The requested acq.fund was not found (ACQ\_FUND\_NOT\_FOUND)*.

**Activatable?** No: The requested acq.fund was not found (ACQ\_FUND\_NOT\_FOUND)

To resolve: Apply funds individually or as a batch. (See: [Apply Funds to Line Items](#) [link])

### **The fund(s) used for the purchase order must not have reached its STOP level.**

Error: If ordering these item(s) would encumber the fund beyond its stop level, the *Activate Order?* field will read, *No; fund [fund name here] would be encumbered beyond its stop level*.

**Activatable?** No; fund EDI (2014) would be encumbered beyond its stop level.

To resolve: in this case more credit must be allocated to the fund, or a different fund must be applied to the purchase order.

If the fund(s) used for the purchase order reaches the WARNING level, staff will be alerted but are able to continue with activating the purchase order.



If you are importing bibs and copies when you activate the PO, you hit Activate and it



gives you the error message that fund(s) are past the warning level, **DO NOT** just hit Activate again! See this troubleshooting FAQ for how to proceed: [PO Activation Fails](#).

## Activating a Purchase Order

When the activation criteria have been met, the *Activate Order* buttons will appear and you can proceed.

1. Click the button *Activate Order*.

Purchase Order (pending)

ID 104

Prepayment Required? No

Name [NameYourPurchaseOrder](#)

Activatable? Yes.

Activate Order

/

Activate Without Loading Items

Provider [TestVendor1 \(TV1\)](#)

Notes [\(1\)](#)

Total Lineitems 1

EDI Messages [\(0\)](#)

Total Estimated \$13.11

History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems

☐

2. When you click *Activate Order*:

- If not previously imported, **the bibliographic records and copies will be imported into the catalog** using the Vandelay interface. (See: [How to Load Bibliographic Records and Items into the Catalog \[link\]](#))
- **The funds associated with the purchases will be encumbered.** This includes any direct charges that may have been added to the purchase order.
- The tab will reload with several changes: an activation date and time are added, encumbered funds updates, and invoicing buttons and cancel order buttons are now available.

## Activate without Loading Items



Once the purchase order has been activated without loading items, it is **NOT** possible to load the items.

This feature should only be used in situations where the copies have already been added to the catalog or if you wish to encumber funds via the Direct Charges feature.

When the activation criteria have been met, the *Activate Order* buttons will appear and you can proceed with the following:

1. Click the button *Activate Without Loading Items*.

Purchase Order (pending)

ID 104

Prepayment Required? No

Name [NameYourPurchaseOrder](#)

Activatable? Yes.

Activate Order

/

Activate Without Loading Items

Provider [TestVendor1 \(TV1\)](#)

Notes [\(1\)](#)

Total Lineitems 1

EDI Messages [\(0\)](#)

Total Estimated \$13.11

History [View](#)

Total Encumbered \$0.00

Total Spent \$0.00

Allow activation with zero-copy lineitems ☐

2. When you click *Activate Without Loading Items*:

- The funds associated with the purchases will be encumbered. This includes any direct charges that may have been added to the purchase order.
- The tab will reload with several changes: an activation date and time, encumbered funds displayed, invoicing and cancel order buttons now available.

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