

Cancel/Suspend

You can cancel or suspend entire purchase orders, line items on a purchase order, or individual copies that are attached to a line item.

The difference between canceling and suspending

Both cancelling or suspending line item both use “cancel reasons.” The process of cancelling or suspending purchase orders/line items/copies are the same whether you are intending to cancel or suspend; the only difference is what cancel reason you choose.

When you choose a cancel reason with the prefix “Cancelled” it has a hidden meaning of “Keep Debits: No (False).” What this means is that your fund debits, (your encumbrance) for that item, are lifted and the money is returned to the fund. The intention is that you will never be receiving that item, and you no longer want your money to be encumbered for it. Usually the item is also cancelled with the vendor.

When you choose a cancel reason with the prefix “Delayed” it has a hidden meaning of “Keep Debits: Yes (True).” This means that the associated fund debits (your encumbrance) for that item, are kept. Therefore your money remains encumbered. The intention is that you will, at some point, receive this item and you would like the money to remain encumbered in your fund. Usually the item remains on order with the vendor. Common cancel reasons for suspending are items that are backordered or not yet published.

Cancel reasons are used to suspend or cancel line items.

PO / Item / Request Cancellation Reasons						New Cancel Reason
Context Org Unit: <input type="text" value="STATELIB"/>						
Back Next Filter						
✓	#	Using Library	Label	Description	Keep Debits?	
<input type="checkbox"/>	1	PINES	OS	Out of Stock	False	
<input type="checkbox"/>	2	PINES	OSI	Out of Stock Indefinitely	False	
<input type="checkbox"/>	3	PINES	PP	Title has been postponed	True	
<input type="checkbox"/>	4	PINES	Pieces delivered	Number of pieces actually received at the final destination.	True	
<input type="checkbox"/>	5	PINES	Repriced	Item has been repriced	False	

Cancel reasons are PINES defaults. You can see a list of them [here](#) that includes whether they are Keep Debits? True or False. If for some reason you need an additional cancel reason, please open a Helpdesk ticket.

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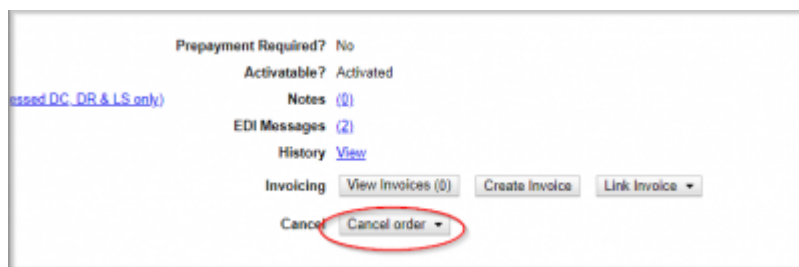
...A Purchase Order

You can cancel or suspend purchase orders where all line items are in a state of *on-order*.

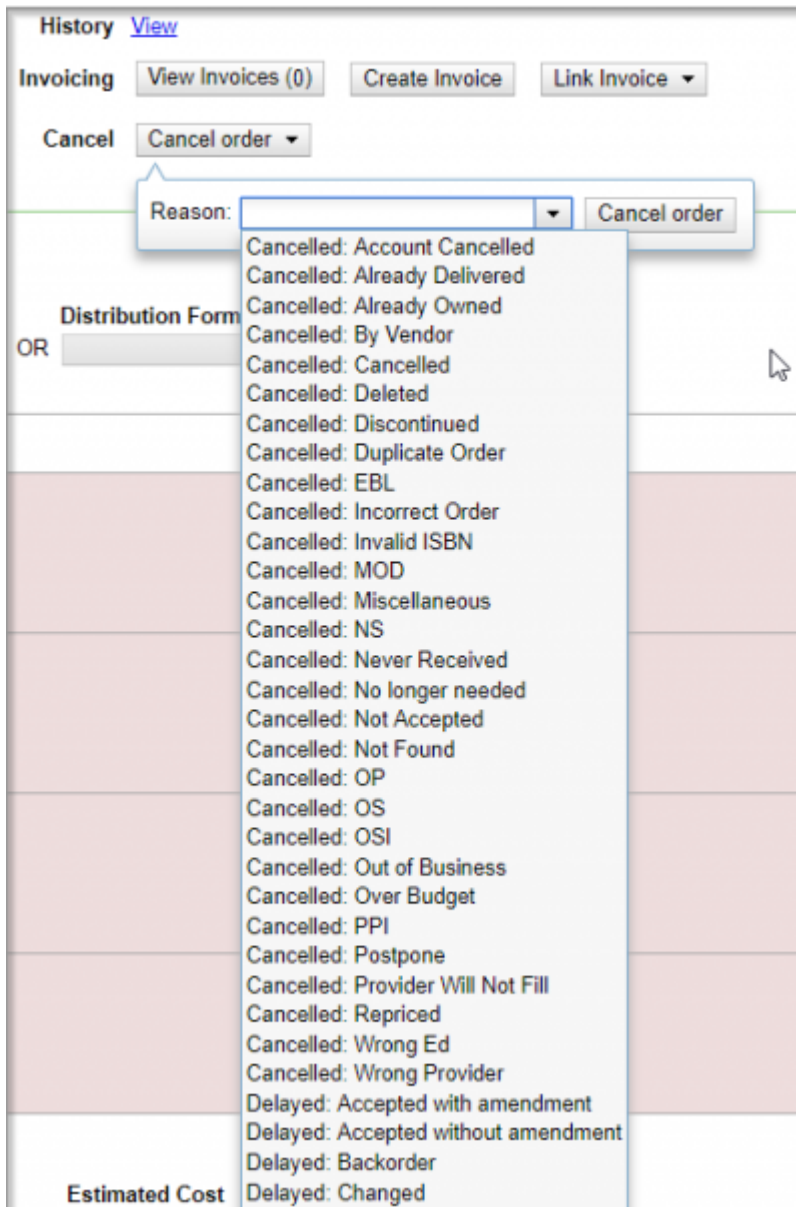
Canceling/Suspending an entire purchase order is most appropriate when all line items need to use the same cancel reason. If you need to use different cancel reasons for different line items, or you only need to mark specific line items cancelled/suspended, you cannot use this method. See [Cancel/Suspend Line Items](#).

Remember: The process to cancel vs. suspend a purchase order is the same. The only difference is which cancel reason you choose.

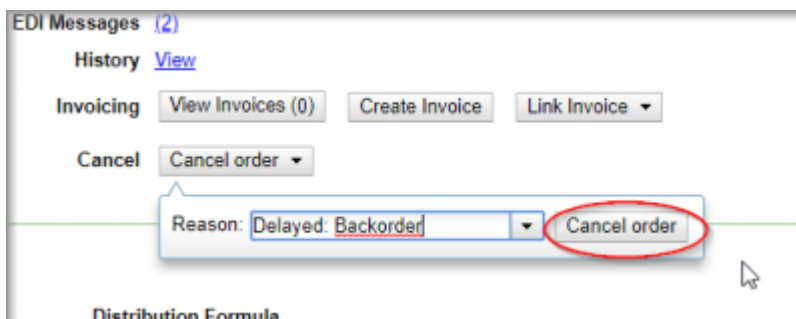
1. Open the purchase order.
2. Click **Cancel order**.



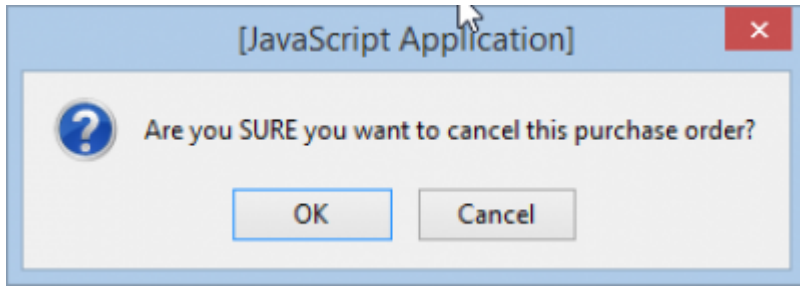
3. From the drop down menu that appears, select a **cancel reason**.



4. Click **Cancel order**.



5. A pop-up will appear asking you to confirm that you wish to cancel the purchase order. Click OK.



6. The status of the purchase order becomes *cancel*ed and:

For Cancels:

- All the line item bars change to white
- The funds no longer show as encumbered

Go Back **Reload** Go Forward Debug

Purchase Order (cancelled) Activated 1/21/16 12:36 PM

ID 65 Prepayment Required? No

Name 65 Activatable? Activated

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

Total Lineitems 3 EDI Messages (1)

Total Estimated \$66.03 History [View](#)

Total Encumbered \$0.00 Invoicing [View Invoices \(0\)](#) [Create Invoice](#) [Link Invoice](#)

Total Spent \$0.00 **Cancel reason** Out Of Print (Cancelled: OP)

--Actions--

Copies Owning Branch Copy Location Collection Code Fund Circ Modifier Distribution Formula [Apply to Selected](#)

Line Items [Expand All Items](#) [Notes](#) [Actions](#) [Status](#) [Est Pri](#)

<input type="checkbox"/>	The cat who sniffed glue / Lilian Jackson Braun.	Braun, Lilian Jackson. 9780816148646 1990. G K. Hall, TV1	Expand	Copies(2)	Notes(2)	-- Actions --	Cancelled: OP	3
# 1606 0 catalog worksheet walkthru? requests view invoice(s) queue								
<input type="checkbox"/>	The world is full of divorced women / Jackie Collins.	Collins, Jackie. 9780446357197 1994, c1975. Warner Books, TV1	Expand	Copies(2)	Notes(2)	-- Actions --	Cancelled: OP	9
# 1607 0 catalog worksheet walkthru? requests view invoice(s) queue								

For Suspends:

- All the line item bars change to blue
- The funds still show as encumbered

Purchase Order (cancelled) Activated 1/6/15 3:26 PM

ID: 100 Prepayment Required? No

Name: 158 Activatable? Activated

Provider: TestVendor1 (TV1) Notes: (0)

Total Line Items: 3 EDI Messages: (0)

Total Estimated: \$99.97 History: View

Total Encumbered: \$54.98 Invoicing: View Invoices (8) Create Invoice Link Invoice

Total Spent: \$0.00 Cancel reason: The quantity of goods that is on back-order. (Delayed Backorder)

Line Items Table:

Line Item	Expand	Copies	Notes	Actions	Status	Estim Price
AND THE MOUNTAINS ECHOED Khaled Hosseini, Hosseini, Khaled. 9781611761801 Unabridged. 2013. Penguin Audio, TV1 Order Identifier: ISBN 9781611761801	Expand	Copies(1)	Notes(0)	- Actions -	Delayed Backorder	\$9.99
GOLDFINCH THE Donna Tartt, Tartt, Donna. 9781660247118 Unabridged. 2013. Hachette Audio, TV1 Order Identifier: ISBN 9781660247118	Expand	Copies(1)	Notes(0)	- Actions -	Delayed Backorder	\$4.99

For backorders, you can and should still receive the items once they arrive at your library.

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...Line Items

You can cancel or suspend line items that have a status of *on-order*.

Cancelling or suspending line items is most appropriate when:

- You need to use different cancel reasons for different line items
- You only need to cancel/suspend some line items in the PO, not all of them
- All the copies under one title can have the same cancel reason (i.e. You cannot cancel at the line item level if you have 3 copies under a title, with one to be backordered, one to be true cancelled, and one to remain on-order)

Remember: The process to cancel vs. suspend line items is the same. The only difference is which cancel reason you choose.



There is an open bug that affects [attempting to cancel line items](#). You may get an error message "ACQ_NOT_CANCELABLE→The object is not in a cancelable state." To resolve, each copy on a line item must be canceled. The status of the line item will remain on-order, but each copy will show a status of canceled. See [Canceling and Suspending Copies](#) for more information.

1. Open a purchase order.
2. Check the box(es) of the line item(s) you wish to cancel.

Go Back Reload Go Forward Debug Print Page

Purchase Order (on-order) Activated 12/4/14 3:07 PM

ID 150 Prepayment Required? No

Name 150 Activatable? Activated

Provider TestVendor1 (TV1) Notes (0)

Total Lineitems 2 EDI Messages (0)

Total Estimated \$61.70 History View


Total Encumbered \$34.75 Invoicing View Invoices (1) Create Invoice Link Invoice

Total Spent \$0.00 Cancel Cancel order

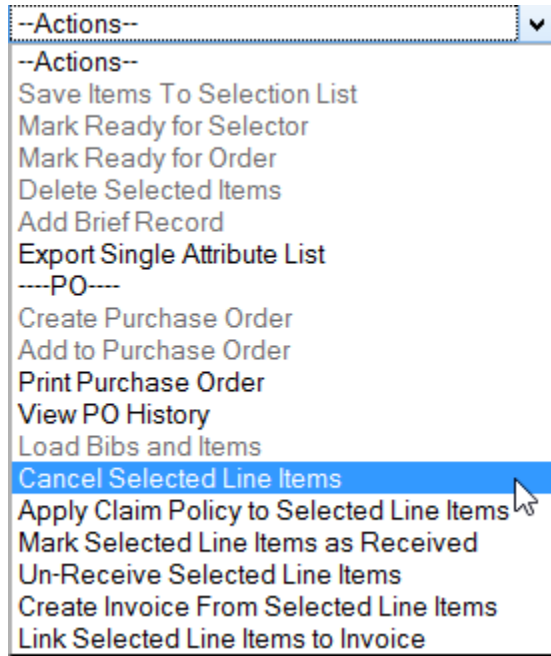
--Actions--

Copies Owning Branch Copy Location Collection Code Fund Circ Modifier Distribution Formula

OR Apply to Selected

Line Items	Expand All	Items	Notes	Actions	Status	Estimated Price
 <p>The pelican brief / John Grisham. Grisham, John. 9780375433481 [2004], c1992. Random House Large Print, TV1</p> <p>Order Identifier ISBN 9780375433481</p> <p># 1611 0 → catalog ↗ worksheet ↗ walkthru3 requests view invoice(s) claim policy: Damaged Replace = queue</p>	Expand	Copies(1)	Notes(1)	-- Actions --	On-Order	26.95

3. Using the main *Actions* menu, select **Actions > Cancel Selected Line Items**.



4. From the drop down menu that appears, select a **cancel reason**.

The screenshot shows a library catalog interface. At the top, there is a dropdown menu labeled "--Actions--" and a "Cancel Line Items" button. Below this, there are fields for "Copies", "Owning Branch", and "Copy Location". A "Line Items" section is visible, showing a book titled "The pelican brief / John Grisham" with its ISBN 9780375433481. A dropdown menu is open, listing various cancellation reasons, with "Cancelled: OSI" highlighted. Other reasons include "Cancelled: Not Accepted", "Cancelled: Not Found", "Cancelled: OP", "Cancelled: OS", "Cancelled: Out of Business", "Cancelled: Over Budget", "Cancelled: PPI", "Cancelled: Postponed", "Cancelled: Provider Will Not Fill", "Cancelled: Publication Canceled", and "Cancelled: Repriced".



If line items are being canceled for different reasons, they will need to be canceled separately so different cancel reasons can be used.

5. Click **Cancel Line Items**.

The screenshot shows the library catalog interface with the "Cancel Line Items" button clicked. A confirmation dialog box titled "[JavaScript Application]" is open, asking "Are you SURE you want to cancel this line item?". The dialog has "OK" and "Cancel" buttons. The "Cancelled: OSI" dropdown is visible in the background.

6. A pop-up will appear asking you to confirm that you wish to cancel the line item. Click OK.

For Cancels:

- The line item bar(s) change to white
- The funds no longer show as encumbered

For Suspend:

- The line item bar(s) change to blue
- The funds still show as encumbered

Purchase Order (on-order) Activated 12/4/14 3:07 PM

ID 150 Prepayment Required? No

Name 150 Activatable? Activated

Provider TestVendor1 (TV1) Notes (0)

Total Lineitems 2 EDI Messages (0)

Total Estimated \$61.70 History View

Total Encumbered \$34.75 Invoicing View Invoices (1) Create Invoice Link Invoice

Total Spent \$0.00 Cancel Cancel order

--Actions--

Copies Owning Branch Copy Location Collection Code Fund Circ Modifier Distribution Formula

Apply to Selected

Line Items Expand All Items Notes Actions Status Estimated Price

<input checked="" type="checkbox"/>	The Revolution	Brand, Russell 9781780893051 2014 Gardners Books TV1									
<input checked="" type="checkbox"/>		Order Identifier ISBN 9781780893051									Delayed: Backorder 34.75

1612 | 0 | [catalog](#) | [worksheet](#) | [walkthru3](#) | [requests](#) | [view invoice\(s\)](#) | [claim policy: Damaged Replace](#) | [queue](#)

For backorders, you can and should still receive the items once they arrive at your library.

...Copies

You can cancel or suspend copies that are in a state of *on-order*.

Cancel a Copy

1. Open a purchase order.
2. Click the *Copies* link on the line item containing the cop(ies) you wish to cancel.

Purchase Order (on-order) Activated 2/21/17 2:35 PM

ID 647 Prepayment Required? No

Name 647 Activatable? Activated

Provider Fake Test Vendor (FTV) Notes (0)

Total Lineitems 3 EDI Messages (0)

Total Estimated \$75.61 History View

Total Encumbered \$48.95 Invoicing View Invoices (0) Create Invoice Link Invoice

Total Spent \$0.00 Cancel Cancel order

--Actions--

Copies Owning Branch Copy Location Collection Code Fund Circ Modifier Distribution Formula

Apply to Selected

Line Items Expand All Items Notes Act

<input type="checkbox"/>	1920s jazz age fashion	Pel, Martin 1910787280 02/15/2017 Unicorn Press Ltd FTV									
<input type="checkbox"/>		Order Identifier ISBN 1910787280									Expand Copies(1) Notes(0)

29388 | 0 | [catalog](#) | [worksheet](#) | [Suppl12](#) | [requests](#) | [view invoice\(s\)](#) | [queue](#)

3. Click the *Cancel* link adjacent to the copy you wish to cancel. Copies must be canceled individually.

Purchase Order (on-order) Activated 2/21/17 2:35 PM

ID 647 Prepayment Required? No

Name 647 Activatable? Activated

Provider Fake Test Vendor (FTV) Notes (0)

Total Lineitems 3 EDI Messages (0)

Total Estimated \$75.61 History View

Total Encumbered \$48.95 Invoicing View Invoices (0) Create Invoice Link Invoice

Total Spent \$0.00 Cancel Cancel order

--Actions--

1920s jazz age fashion, by Pel, Martin (1910787280)

1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed

Estimated \$26.70, Encumbered \$26.70, Paid \$0.00

29388 # 647 2/21/17 + Suppl12

Add/Edit Items

< Return | Item Count: 1 | Go | Save Changes

Distribution Formulas [dropdown] | Apply | Reset Formulas

Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Callnumber	Batch Update
[dropdown]	[dropdown]	[input]	[dropdown]	[dropdown]	[input]	[button]

Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode	Notes	Receiver
STATELIB-L	ON ORDER	[input]	Mary (2017)	book	ACQ29939	ACQ29939	[input]	Mark Received Cancel

4. From the drop down menu that appears, select a cancel reason.

Reason: Canceled: OSI [dropdown] [button: Cancel Copy]

5. Click Cancel Copy.

6. A pop-up will appear asking you to confirm that you wish to cancel the copy. Click OK.

7. The status of the item becomes canceled.

1920s jazz age fashion, by Pel, Martin (1910787280)

1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 1 Cancelled, 0 Delayed

Estimated \$0.00, Encumbered \$0.00, Paid \$0.00

29388 # 647 2/21/17 + Suppl12

Add/Edit Items

< Return | Item Count: 1 | Go | Save Changes

Distribution Formulas [dropdown] | Apply | Reset Formulas

Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Callnumber	Batch Update
[dropdown]	[dropdown]	[input]	[dropdown]	[dropdown]	[input]	[button]

Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode	Notes	Receiver
STATELIB-L	ON ORDER	[input]	Mary (2017)	book	ACQ29939	ACQ29939	[input]	Canceled: OSI

The line item bar will only change to white and have a status of canceled if all copies for the line item have been canceled.

The funds for the particular copy will no longer be encumbered.

Purchase Order (on-order) Activated 2/21/17 2:35 PM

ID 647 Prepayment Required? No

Name [647](#) Activatable? Activated

Provider [Fake Test Vendor \(FTV\)](#) Notes [\(0\)](#)

Total Lineitems 3 EDI Messages [\(0\)](#)

Total Estimated \$75.61 History [View](#)

Total Encumbered \$22.25 Invoicing [View Invoices \(0\)](#) [Create Invoice](#) [Link Invoice](#)

Total Spent \$0.00 Cancel [Cancel order](#)

--Actions--

Copies Owing Branch Copy Location Collection Code Fund Circ Modifier Distributi

Line Items	Items	Notes	Actions	Status	Estimated Price
10-minute millionaire: the shockingly easy trick for making more money than you can spend in two lifetimes Hsu, Robert 1118856708 02/13/2017 John Wiley & Sons Inc FTV Order Identifier ISBN 1118856708 # 29351 0 catalog worksheet Suppl12 requests view invoice(s) queue	Copies(1)	Notes(0)	-- Actions --	Canceled: By Vendor	26.66
1920s jazz age fashion Pel, Martin 1910787280 02/15/2017 Unicorn Press Ltd FTV Order Identifier ISBN 1910787280 # 29388 0 catalog worksheet Suppl12 requests view invoice(s) queue	Copies(1)	Notes(0)	-- Actions --	On-Order	26.70

Suspend a Copy

1. Open a purchase order.
2. Click the *Copies* link on the line item containing the cop(ies) you wish to suspend.

Purchase Order (on-order) Activated 2/21/17 2:35 PM

ID 647 Prepayment Required? No

Name [647](#) Activatable? Activated

Provider [Fake Test Vendor \(FTV\)](#) Notes [\(0\)](#)

Total Lineitems 3 EDI Messages [\(0\)](#)

Total Estimated \$75.61 History [View](#)

Total Encumbered \$48.95 Invoicing [View Invoices \(0\)](#) [Create Invoice](#) [Link Invoice](#)

Total Spent \$0.00 Cancel [Cancel order](#)

--Actions--

Copies Owing Branch Copy Location Collection Code Fund Circ Modifier Distribution Formula [Apply to Selected](#)

Line Items [Expand All](#) Items Notes Act

1920s jazz age fashion Pel, Martin 1910787280 02/15/2017 Unicorn Press Ltd FTV Order Identifier ISBN 1910787280 # 29388 0 catalog worksheet Suppl12 requests view invoice(s) queue	Expand	Copies(1)	Notes(0)	-- /
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3. Click the *Cancel* link adjacent to the copy you wish to suspend. Copies must be suspended individually.

Purchase Order (on-order) Activated 2/21/17 2:35 PM

ID 647 Prepayment Required? No

Name 647 Activatable? Activated

Provider Fake Test Vendor (FTV) Notes (0)

Total Lineitems 3 EDI Messages (0)

Total Estimated \$75.61 History View

Total Encumbered \$48.95 Invoicing View Invoices (0) Create Invoice Link Invoice

Total Spent \$0.00 Cancel Cancel order

--Actions--

1920s jazz age fashion, by Pel, Martin (1910787280)

1 Ordered, 0 Received, 0 Invoiced, 0 Claimed, 0 Cancelled, 0 Delayed

Estimated \$26.70, Encumbered \$26.70, Paid \$0.00

29388 # 647 2/21/17 + Suppl12

Add/Edit Items

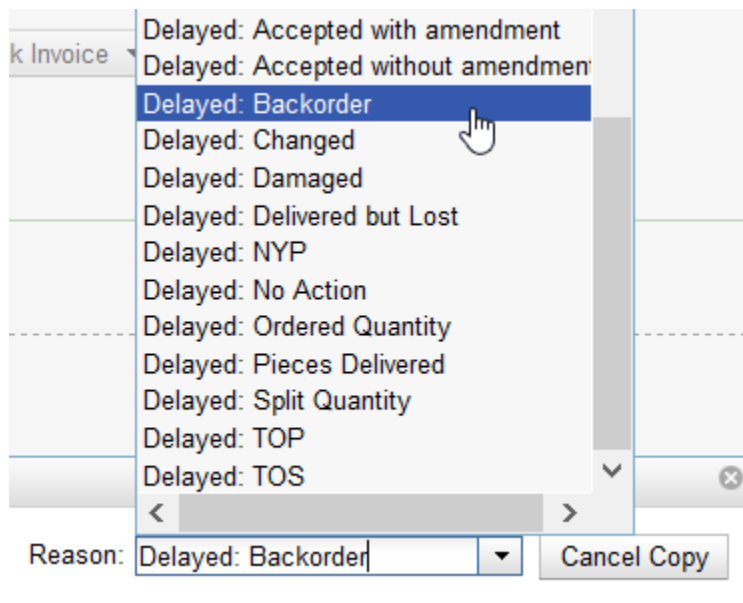
Return | Item Count: 1 | Go | Save Changes

Distribution Formulas Apply Reset Formulas

Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Callnumber	Batch Update

Owning Branch	Copy Location	Collection Code	Fund	Circ Modifier	Callnumber	Barcode	Notes	Receiver
STATELIB-L	ON ORDER		Mary (2017)	book	ACQ29939	ACQ29939		Mark Received Cancel

4. From the drop down menu that appears, choose a cancel reason that keeps debits.



5. Click *Cancel copy*.

6. A pop-up will appear asking you to confirm to that you wish to cancel the copy. Click *OK*.

7. The status of the copy becomes canceled. The line item bar will only change to white and have a status of canceled if all copies for the line item have been canceled.

Because the copy has been suspended rather than truly canceled, the funds for the copy are still encumbered.

	Barcode	Notes	Receiver
916	ACQCRLS29912	<input type="text"/>	Cancelled: OP
916	ACQCRLS29914	<input type="text"/>	Cancel Delayed: Backorder
916	ACQCRLS29915	<input type="text"/>	Mark Received Cancel
916	ACQCRLS29916	<input type="text"/>	Mark Received Cancel

8. A suspended copy is resolved when the item arrives and is marked received.

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Last update: **2019/06/26 22:08**