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

Name 1555 Activatable? Yes Activate Order / Activate Without Loading Rems Provide: Base (Base) Noes () Total Eliminate: 58.95 Filsery, Yess Total Eliminate: 58.95 Filsery, Total Eliminate Total Eliminate: 58.95 Filsery, Total Eliminate Total Eliminate: 58.95 Filsery, Total Eliminate Statione: Statione: Scanael Constitution Formula Filsery, Total Eliminate Scanael Constitution Formula Filsery, Total Eliminate Scanael Constitution Formula Filsery, Filser,	Purchase Order (pending) ID 1545 Prepayment Required? No	PO Information
Total Lineitems 2 EDI Messages Bittiony Set Total Estimated 55.05 History Set Total Estimated 50.00 Total Spenti 30.00 Allow activation with azero-copy lineitems Set Set Order by Lineitems Batch Updater	Name 1545 Activatable? Yes. Activate Order / Activate Without Loading Items	
Total Estimated \$58 95 History Yaw Total Estimated \$50 95 History Yaw Total Estimated \$50 95 Naliova activation with acco-copy lineitems Spid Order by Lineitems	Provider Baker (Baker) Notes (0)	
Total Encumbered 50.00 Total Speet 50.00 Allow activation with zero copy lineitems Split Order by Lineitems Actions Actions Split Order by Lineitems Actions Split Order by Lineitems Actions Split Order by Lineitems Actions State Split Order by Lineitems Actions State State State State Split Order by Lineitems Actions State State State State State State State	Total Lineitems 2 EDI Messages (Q)	
Total Spent 50.00 Spic Order by Lineitems Copies Owning Branch Copies Coming Collection Code Fund Circ Modifier OR	Total Estimated \$58.95 History View	
Allow activation with zero-copy lineitems Skt Oxfer by Lineitems Actions	Total Encumbered \$0.00	
Spit Order by Lineitems Copies Owning Branch Copy Location Collection Code Fund	Total Spent \$0.00	
Actions Action Menu Copies Owning Branch Copy Location Collection Code Fund Circ Modifier Distribution Formula Copies Owning Branch Copy Location Collection Code Fund Circ Modifier OR Apply to Selected Line Items Expand All Items Notes Actions Status Estimate Sycamore Row / John Grisham. Grisham. John 970038537131 Fust estion 2013 Random House In: Baker Order Identifier EBN 970038537131 # 64075 101 - catalog ^ worksheet requests yew imoice(s)] ~ queue For Charges, Taxes, Fees, etc. There are no miccellance atlached to this purchase order. Direct Charges, Taxes, Fees, etc. There are no miccellance atlached to this purchase order.	Allow activation with zero-copy lineitems	
Systematics Expand All Items Notes Actions Statu Prince I Line Items Succanore. Row / John Grisham. Order Identifier [SBN v 9780385537131 First edition.2013 Random House Inc Baker Order Identifier [SBN v 9780385537131 • • • • • • • • • • • • • • • • • •	Split Order by Lineitems	
Systematics Expand All Items Notes Actions Statu Prince I Line Items Succanore. Row / John Grisham. Order Identifier [SBN v 9780385537131 First edition.2013 Random House Inc Baker Order Identifier [SBN v 9780385537131 • • • • • • • • • • • • • • • • • •	Action Menu	
✓ Ine Items OR ▲ Apply to Selected ✓ Line Items Expand All Items Notes Actions Statu Estimate ✓ Line Items Systamore Row Llohn Grisham. Status Estimate Price ✓ Ginsham, John, 9700385537131 First edition 2013 Random House Inc Baker Expand Copies(1) Notes(0) - Actions		
Expand All Items Expand All Items Notes Actions Status Estimation Systemacre Row J.John Grisham. Grisham. John. 970038553713 [] Status Setimation Setimation <td></td> <td></td>		
Child refersion Copies(1) Notes(0) Actions Status Price Image: Status Finand Andres Records Status Price Image: Status Status Price Records Status Price Image: Status Status Price Records Records Status Price Image: Status Status Price Records Re		rypy to celetere
Grisham, John - 9700336537131 First edition 2013 Random House Inc Baker Expand Capies(1) Notes(0) - Actions \virtual Conder C		
Image: Series of the serie	∠ Line Items	Expand All Items Notes Actions Status Estimated Price
There are no miscellanes attached to this purchase order, Direct Charges	Sycamore Row / John Grisham, Grisham, John. 9780385537131 First edition 2013 Random House Inc Baker Order Identifier ISBN v 9780385537131 v	Expand All items notes Actions Status Price
Click to enlarge	Sycamore Row / John Grisham. Grisham, John. 9780385537131 First edition 2013 Random House Inc Baker Order Identifier [ISBN v] 9780385537131 v # 6407510]catalog A worksheet requests view invoice(s)] queue Image: Comparison of the state of the	Expand All nems notes Actions Status Price Expand Copies(1) Notes(0) Actions Pending- 28.95 Order

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*.



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.

Ρι	urchase Order History													
Bad	Back Next Filter													
~	#	Audit Time	Name	State	Ordering Agency	Provider	Create Time	Edit Time	Order Date	Creator	Editor	Owner	Cancel Reason	Prepayment Required
	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
	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
	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
	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.

pending)		
104	Prepayment Required?	No
NameYourPurchaseOrder	Activatable?	No: The reque
TestVendor1 (TV1)	Notes	ጨ
1	EDI Messages	N
\$13.11	History	View
\$0.00		
\$0.00		
	pending) 104 NameYourPurchaseOrder TestVendor1 (TV1) 1 \$13.11 \$0.00 \$0.00	104Prepayment Required?NameYourPurchaseOrderActivatable?TestVendor1 (TV1)Notes1EDI Messages\$13.11History\$0.00

3. Click New Note.

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

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

Purchase Order (p	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			

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

				ending)	hase Order (p	Purch
		No	Prepayment Required?	104	ID	
		No:	Activatable?	NameYourPurchaseOrder	Name	
		(1)	Notes	TestVendor1 (TV1)	Provider	
		Ð	EDI Messages	1	tal Lineitems	То
		Viev	History	\$13.11	tal Estimated	То
				\$0.00	Encumbered	Total
				\$0.00	Total Spent	
			Allow activation with zero-copy lineitems			
New Note 👻	New Note				eturn	≺ Re
PM Delete	7/26/16 5:33 PM Delet			e Note	Example	1.
3	7/26/16 5:33			e Note	Example	1.

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.

Purchase Order (p	ending)		
ID	104	Prepayment Required?	No
Name	NameYourPurchaseOrder	Activatable?	No: T
Provider	TestVendor1 (TV1)	Notes	(1)
Total Lineitems	1	EDI Messages	5
Total Estimated	\$13.11	History	<u>View</u>
Total Encumbered	\$0.00		
Total Spent	\$0.00		

Split Purchase Order by Line Items

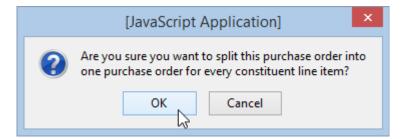
You can create a purchase order with multiple line items and then split the purchase order so that <u>each</u> line item is on a separate purchase order.

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.

Purchase Order (p	ending)
ID	67
Name	<u>67</u>
Provider	TestVendor1 (TV1)
Total Lineitems	10
Total Estimated	\$144.00
Total Encumbered	\$0.00
Total Spent	\$0.00
Split Order by Lineite	ems

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

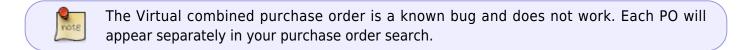


4. The line items will display with a PO search.

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

PO Search			
ID Provider State ✓ Show results as a virtual combined PO	Pending New In Process Pending On order	▼ Ordering Agency ▼ Search	

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.



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\$0.00Total Encumbered\$0.00Total 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



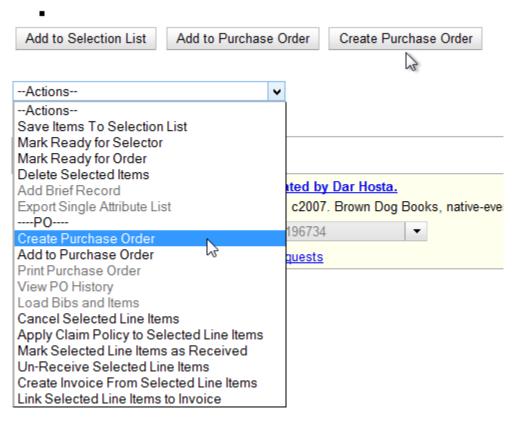
There is a soft limit of 250 items (copies) on purchase orders. If the resulting invoices have more than 250 items, there become issues with printing and EDI orders may fail.

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



2. A pop-up box will appear.

	⊗,
Ordering Agency	•
Name (optional)	
Provider	
Prepayment Required	
All Line Items	۲
Selected Line Items	0
Import Bibs and Create Copies	
Submit	Cancel

- 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.

	8
Ordering Agency	STATELIB 🗸
Name (optional)	NameYourPurchasOrder
Provider	TV1
Prepayment Required	
All Line Items	۲
Selected Line Items	0
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	1	Activate Without Loading Items
Provider	TestVendor1 (TV1)	Notes	<u>(0)</u>			
Total Lineitems	0	EDI Messages	<u>(0)</u>			
Total Estimated	\$0.00	History	<u>View</u>			
Total Encumbered	\$0.00					
Total Spent	\$0.00					
		Allow activation with zero-copy lineitems				
Add Brief Record						
Direct Charges, Taxe There are no miscellar	es, Fees, etc. nea attached to this purcha	se 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.

9/14

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].

	8
Ordering Agency	STATELIB 🗸
Name (optional)	BlanketAFICBS
Provider	FTV
Prepayment Required	
Cancel	Save

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

Purchase Order (p	pending)					
ID	645	Prepayment Required?	No			
Name	BlanketAFICBS	Activatable?	Yes.	Activate Order	1	Activate Without Loading Items
Provider	Fake Test Vendor (FTV)	Notes	<u>(0)</u>			
Total Lineitems	0	EDI Messages	<u>(0)</u>			
Total Estimated	\$0.00	History	<u>View</u>			
Total Encumbered	\$0.00					
Total Spent	\$0.00					
		Allow activation with zero-copy lineitems				
Actions	~]				
	es, Fees, etc. hea attached to this purch Save New Charges	ase order.				

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

pending)					
645	Prepayment Required?	No			
BlanketAFICBS	Activatable?	Yes.	Activate Order	1	Activate Without Loading Items
Fake Test Vendor (FTV)	Notes	<u>(0)</u>			
0	EDI Messages	<u>(0)</u>			
\$0.00	History	<u>View</u>			
\$0.00					
\$0.00					
	Allow activation with zero-copy lineitems				
~					
nea attached to this purch	ase order.				
	es, Fees, etc.	645 Prepayment Required? BlanketAFICBS Activatable? Fake Test Vendor (FTV) Notes 0 EDI Messages \$0.00 History \$0.00 \$0.00 Allow activation with zero-copy lineitems es, Fees, etc. hee attached to this purchase order.	645 Prepayment Required? No BlanketAFICBS Activatable? Yes. Fake Test Vendor (FTV) Notes (0) 0 EDI Messages (0) \$0.00 History View \$0.00 Allow activation with zero-copy lineitems	645 Prepayment Required? No BlanketAFICBS Activatable? Yes. Activate Order Fake Test Vendor (FTV) Notes (0) 0 EDI Messages (0) \$0.00 History View \$0.00 Allow activation with zero-copy lineitems Image: Comparison of the set of the s	645 Prepayment Required? No BlanketAFICBS Activatable? Yes. Activate Order / Fake Test Vendor (FTV) Notes (0) 0 EDI Messages (0) \$0.00 History View \$0.00 Allow activation with zero-copy lineitems -

- 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 (p	pending)							
ID	645	Prepayment Required?	No					
Name	BlanketAFICBS	Activatable?	Yes.	Activate Order	1	Activate Without Loading Items		
Provider	Fake Test Vendor (FTV)	Notes	<u>(0)</u>					
Total Lineitems	0	EDI Messages	<u>(0)</u>					
Total Estimated	\$0.00	History	<u>View</u>					
Total Encumbered	\$0.00							
Total Spent	\$0.00							
		Allow activation with zero-copy lineitems						
Actions	~]						
Direct Charges, Taxe Charge Type	es, Fees, etc. Fund	Title/De	scriptio	on Auth	hor	Note	Estimated Cost	
Blanket Order	▼ George (2017)	•					5,000.00	X
New Charge	Save New Charges							

9. Click Activate Order.

Purchase Order (p	pending)							
ID	645	Prepayment Required?	No					
Name	BlanketAFICBS	Activatable?	Yes.	Activate Order	Activate Witho	ut Loading Items		
Provider	Fake Test Vendor (FTV)	Notes	<u>(0)</u>	0				
Total Lineitems	0	EDI Messages	<u>(0)</u>					
Total Estimated	\$5000.00	History	<u>View</u>					
Total Encumbered	\$0.00							
Total Spent	\$0.00							
		Allow activation with zero-copy lineitems						
Actions	~]						
Direct Charges, Taxe	es, Fees, etc.							
Charge Type	Fund	Title/Description		Author	Note	Estima	ted Cost	
Blanket Order	George (2017)					5000.0	0 [X
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.

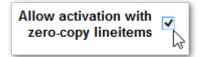
Error: If there is no copy, the Activate Order? field will read, Activatable? No: The lineitem has no

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.





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	1	Activate Without Loading Items			
Provider	TestVendor1 (TV1)	Notes	(1)	Ŀ					
Total Lineitems	1	EDI Messages	<u>(0)</u>						
Total Estimated	\$13.11	History	<u>View</u>						
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	1	Activate Without Loading Items			
Provider	TestVendor1 (TV1)	Notes	(1)			Ē			
Total Lineitems	1	EDI Messages	<u>(0)</u>						
Total Estimated	\$13.11	History	<u>View</u>						
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.

From: https://pines.georgialibraries.org/dokuwiki/ - **PINES Documentation**

Permanent link: https://pines.georgialibraries.org/dokuwiki/doku.php?id=acq:purchaseorders

Last update: 2019/06/27 01:59

