

# STANDING ORDERS

# Standing Orders Monograph In Alma

**Standing order** – Orders that are not repeated on a frequent or regular basis. Used, for example, for purchasing all the printed books by a particular author when they are published, or where a series of books are being published, but not necessarily on a regular basis. Physical monograph material is not received on the Receive New Material page. Instead, it is created manually by creating or choosing a bibliographic record, creating a holdings record, and then creating an item record, which you associate with the standing order PO line. You set a receipt date for the item in the Physical Item Editor.

- Standing orders is used for “unknown” receipt of material
  - Used when you do not know what the items(s) will be and when they will arrive
- Continuous is used for items that are expected and can be predicted
- PO Lines for standing order monographs do not create inventory
  - Holding and item records are created upon receipt of the Standing Order monograph
  - Items received are linked by the POL to the Standing Order container record
- Never receive on the Standing Order placeholder record

ExLibris Documentation for Standing Orders:

- <https://proquestmeetings.webex.com/mw3300/mywebex/nbrshared.do>
- [https://knowledge.exlibrisgroup.com/@api/deki/files/48554/Acquisitions\\_-\\_Standing\\_Orders\\_in\\_Alma.pptx?revision=4](https://knowledge.exlibrisgroup.com/@api/deki/files/48554/Acquisitions_-_Standing_Orders_in_Alma.pptx?revision=4)
- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/020Acquisitions/020Purchasing/010Purchasing\\_Workflow](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/020Acquisitions/020Purchasing/010Purchasing_Workflow)
- [https://knowledge.exlibrisgroup.com/Alma/Knowledge\\_Articles/How\\_to\\_receive\\_an\\_item\\_for\\_a\\_POL\\_of\\_type\\_Standing\\_Order\\_Monograph](https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/How_to_receive_an_item_for_a_POL_of_type_Standing_Order_Monograph)

## Background “Summary of One Time and Continuous”

POL Type	Inventory Receipt / Activation	Holdings and Items Creation	POL closure
Standing Order - Physical	Not “received”. Created and linked to POL in the item.	Holdings and items are created manually.	The PO line is manually closed
Standing Order - Electronic	Goes through the standard activation process.		The PO line is manually closed

# Steps To Create A Physical Standing Order

1. Create or use an existing bib record to **Order** from the NZ to serve as a placeholder record. If the bib record is not in the NZ:
  - a. Import it from OCLC to the NZ
  - b. Create the bib record from the metadata editor
    - i. ***File>Options>Placement of new records and templates***: Network
2. Create a POL
  - a. Purchase type: [Physical - Standing Order]
  - b. List price: [enter the amount to be encumbered for the FY]
3. “Send” the Order
4. Suppress the bib record
  - a. It is not a real record, but a placeholder for the Standing order

# Ordering A Physical Standing Order

1. Perform a repository search
2. Click ***Order***

The screenshot displays a library catalog search results page. At the top, a search bar contains the text "(OCoLC)32416774". Below the search bar, the results are filtered by "All Titles (1 - 1 of 1)". The "Network" tab is selected and highlighted with a red box. The search results are sorted by "Publication Date - Desc" and "Rank". The first result is "Music of the United States of America : MUSA." with the following details:

- Journal (Other Serial - Physical) text; unmediated; volume** By American Musicological Society. (Madison, Wis. : Published for the American Musicological Society by A-R Editions 1993-)
- Subject:** Music--United States--Scores. United States. Periodicals. and others
- Series:** Recent researches in American music.
- ISSN:** 1066-8217
- Record number:** ocm32416774-01suny\_network
- Language:** English
- Update Date:** -

At the bottom of the result, there are links for "Electronic", "Digital", "Held by (1)", and "Other details". On the right side of the result, there is an action menu with buttons for "Order" and "...". A red arrow points to the "Order" button.

# Create PO Line For A Physical Standing Order

1. PO Line Owner and Type Screen opens
  - a. PO Line Type: [Physical Book - Standing Order]
  - b. Po line owner: [ordering library]
  - c. Click Create **PO Line**

< PO Line Owner and Type Cancel Create PO line

1 **Music of the United States of America : MUSA.**  
Journal {Other Serial - Physical} text; unmediated; volume By American Musicological Society. (Madison, Wis. : Published for the American Musicological Society by A-R Editions 1993-)  
ISSN: 1066-8217  
Series: Recent researches in American music.  
Subject: Music--United States--Scores. United States. Periodicals. and others

Description \* **Music of the United States of America : MUSA.**

PO line type \* **Print Book - Standing Order**

PO line owner \* **Milne Library**

Load from template

# Create PO Line For A Physical Standing Order

## 1. Purchase Order Line Details

- a. Notice no holding or item record is created
- b. Mandatory fields
  - i. Materials supplier: [appropriate vendor]
  - ii. List price: [amount to be encumbered for the Fiscal Year]
  - iii. Add fund: [add the appropriate fund]
  - iv. Manual renew: [keep checked]
    - 1. If unchecked, renewal cycle field appears
  - v. Renewal date:[date of renewal]
  - vi. Renewal reminder period (days): [number of days prior to renewal to be notified]
- c. Optional fields
  - i. Material type:
  - ii. Reporting Code:
- d. Click **Order Now**

Purchase Order Line Details

Save as template

Change Bib Reference

Delete

Cancel Line

Order Now

Save

Back

Save and Continue

Music of the United States of America : MUSA., Madison, Wis. :, Published for the American Musicological ...



PO line  
POL-211  
Print Book - Standing Order

PO  
PO line owner  
-  
Milne Library

Status  
Sent date  
In Review (2019-03-04)

Summary

Description

Alerts

Invoice Lines

Associated PO Lines

Communications

Interested Users

History

Notes

Attachments

Ordered Items

No records were found.

Receiving note

Routing during receiving

Binding during receiving

Vendor Information

Material supplier \* EBSCO/EBSCO-00/Default Account - E

View vendor

Claiming grace period  
(days)

90

Expected receipt after  
ordering (days)

0

Or expected receipt date

Pricing

List price \*

500.00

USD

Net price 500.00 USD

Quantity for pricing \*

1

Discount (%)

0.0

Funding

Add Fund

Redistribute Lines

#	Fund Name	Fund Code	Percent	Amount
1	Library Continuing Resources (FY-2019) (65,062.85 USD)	LIBR-CONT	100.0%	500.00 USD
2	Total	-	100.0%	500.00 USD

PO Line Details

Acquisition method Purchase at Vendor System

Material type Book

Invoice status No invoice

Reporting code Print\*Monographs (7031)

Secondary reporting code

Tertiary reporting code

Rush

Manual packaging

Cancellation restriction

Cancellation restriction  
note

Identifier 1066-8217

Proposed identifier

Vendor reference number

Vendor reference number  
type

Note to vendor

Vendor invoice number -

Renewal

Manual renewal



Subscription from date

Subscription to date

Renewal date \* 12/30/2019

Renewal reminder period  
(days) \*

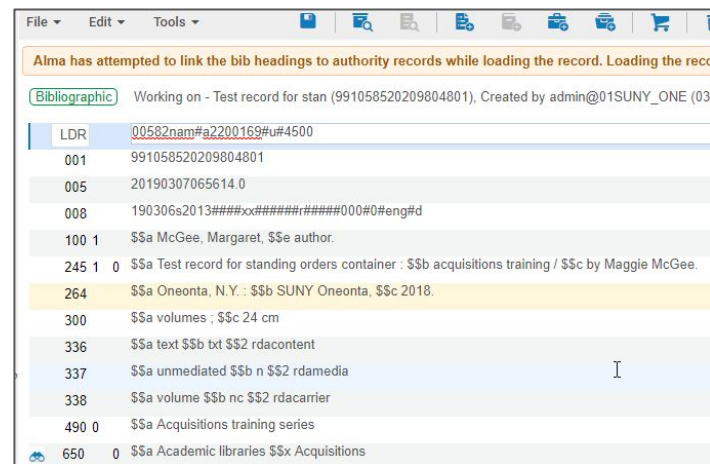
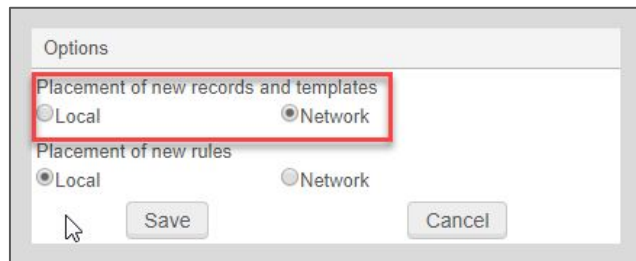
90



# Create A Brief Bib Record For Physical Standing Orders Not In The NZ

Manually create a brief bib record if it does not exist in the NZ or OCLC

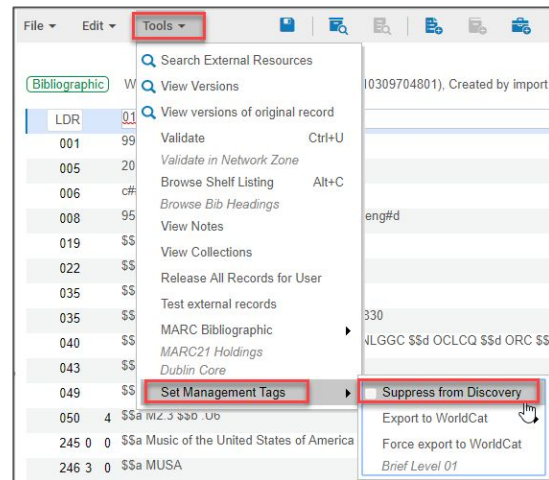
1. Go to **Resources>Cataloging>Open Metadata Editor**
2. Click **File>Options**
  - a. Make sure “Placement of new records and templates” is set to **Network**
3. Click **File>New>MARC21 Bibliographic**
  - a. Catalog the Bib record for the container
  - b. Click **File>Save and Release Record** (Ctrl+Alt+R)
  - c. Order from the NZ bib record as usual



[MSP-14 Policy on In-Process Brief Bibliographic Records](#)

# Suppress The Physical Standing Order Bib Record

1. Perform a repository search for the Standing Order placeholder in the IZ
  - a. Click **Edit Record**
    - i. Go to **Tools>Set Management Tags>Suppress from Discovery**
  - b. Click **File>Save and Release Record** (Ctrl+Alt+R)



# Steps To Receive Physical Standing Orders

1. Use an existing bib record or create a separate bib record for the item in hand
  - a. Add holding record
  - b. Add an item record
    - i. Item record Detail screen
      1. Enter date received
      2. Link the item record to the POL
2. Pay for the item
  - a. Create an invoice
    - i. Use From PO (POL-### if known)
  - b. Create a separate invoice line for each item
3. Pay the Invoice as you would normally pay an invoice
  - a. Close invoice

# Receiving A Physical Standing Orders In The NZ

1. Find the bib record for the title in hand in the NZ
  - a. Click **Edit Record**

The screenshot shows a library catalog interface. At the top, there are tabs for 'Institution', 'Network', and 'Community'. Below these, there are sorting options: 'Sort by : Publication Date - Desc' and 'Secondary Sort by : Rank'. On the right, there are links for 'Expand', a share icon, and a settings icon. The main content area displays a record for '1 🏠 The most important thing : discovering truth at the heart of life / Adyashanti.' The record details include: 'Book (Book - Physical) text; unmediated; volume By Adyashanti, (Boulder, CO : Sounds True, [2019])', 'Subject: Meditation. Self. Self-realization.', 'ISBN: 9781683641919 and others', 'Record number: (OCoLC)1022794640', 'Language: English', and 'Update Date: -'. At the bottom, there are links for 'Electronic', 'Digital', 'Held by (1)', and 'Other details'. A red arrow points to the 'Edit Record' button, which is located next to the 'Order' button and a three-dot menu icon.

Sort by : Publication Date - Desc	Secondary Sort by : Rank	Expand	Share	Settings
1 🏠 The most important thing : discovering truth at the heart of life / Adyashanti.				
Book (Book - Physical) text; unmediated; volume By Adyashanti, (Boulder, CO : Sounds True, [2019])				
Subject: Meditation. Self. Self-realization.				
ISBN: 9781683641919 and others				
Record number: (OCoLC)1022794640				
Language: English				
Update Date: -				
⌵ Electronic Digital Held by (1) Other details				
Edit Record Order ...				

# Receiving A Physical Standing Orders

This is an optional step, however it is a way for titles that are part of a series to be attached to the series (placeholder) record.

## 2. Review the bib record for MARC field 760

- a. 760 links this bib record back to the placeholder record for the series
- b. Add field (F8) if there is not a 760 MARC field in the record
  - i. 760 0# \$\$a series title \$\$w (OCoLC)#
- c. Click **File>Save Record** (Ctrl+S)

Record saved at 7:17:58 AM. You have 1 warning(s) in your record

**Bibliographic** Working on - International taxati (991058487611904801), Created by admin@01SUNY\_ONE (02/19/2019 11:54:24 EST), Modified by admin@01SUNY\_ONE (03/07/2019 07:17:57 EST)  
avoidance. In addition to providing a survey of the technical rules, the book also offers insight into tax planning considerations and how these have been altered by recent U.S. and global developments. Both the U.S. activities of foreign taxpayers, as well as the foreign activities of U.S. taxpayers are explored. In today's world, it is crucial for those involved in business and investment activities to understand the tax consequences that impact cross-border flows. The authors' careers span both the academic and private sectors, and they have used their experiences to distill the complexities of real-world tax considerations into a clearly written, straight-forward presentation of the key international tax concepts."--Publisher website.

650	0	\$\$a Income tax \$\$z United States \$\$x Foreign income.
650	0	\$\$a Investments, Foreign \$\$x Taxation \$\$x Law and legislation \$\$z United States.
650	0	\$\$a Corporations, Foreign \$\$x Taxation \$\$x Law and legislation \$\$z United States.
650	0	\$\$a Aliens \$\$x Taxation \$\$x Law and legislation \$\$z United States.
655	7	\$\$a Study guides. \$\$2 lcgt
700	1	\$\$a Doernberg, Richard L., \$\$e author.
775	0	8 \$\$i Revision of. \$\$a Doernberg, Richard L. \$\$t International taxation in a nutshell. \$\$b 10th ed. \$\$d St. Paul, Minn. : West, ©2016 \$\$z 1634604350 \$\$w (OCoLC)933441973
760	0	\$\$a Nutshell series \$\$w (OCoLC)785276097
830	0	\$\$a Nutshell series.
930		\$\$a 20180910
948		\$\$a LTI 09/16/2018

# Receiving A Physical Standing Orders

## 3. Add a holdings record

a. Click on the **Add Holdings** icon (Ctrl+Alt+H)

i. Edit the holding record

1. \$\$b [library code] \$\$c [Location]

ii. Click **Save** (Ctrl+S)

1. Call number auto-populates

File Edit Tools

**Add Holdings**

**Bibliographic** Working on - The Ingalls Wilder f (991044396189704801), Created by import (10/07/2018 15:00:36 EDT), Modified by admin@01SUNY\_ONE (03/05/2019 18:00:41 EST)

LDR	05339ccm#a2200529la#4500
001	991044396189704801
005	20190305180041.0
008	110114s2011####wiumum###bhi###n####eng#d
010	\$\$a ##2013568462
020	\$\$a 9780895796875

**Holdings** Working on - The Ingalls Wilder f (22118019980004804), Created by admin (03/05/2019 18:17:44 EST), Modified by admin (03/05/2019 18:17:44 EST)

LDR	00150nx##a22000611n#4500
008	1011252u####8####4001uueng0000000
005	20190305181744.0
852 0	\$\$b ONEMN \$\$c BOOKO \$\$h M2.3.U6 \$\$i R4 vol. 71

Record saved at 6:17:45 PM.

# Receiving A Physical Standing Orders

## 4. Add an item record

- a. Click on the **Add Item** icon (Alt+I)
- b. Item Editor opens
  - i. Barcode: [scan/type barcode number]
  - ii. Material type: [material type for the item in hand]
  - iii. Item policy: [choose the appropriate item policy]
  - iv. POLine: [enter Po Line]
    1. Search by POL-####
    2. Search by title
  - v. Receiving date: [select date of receipt]
  - vi. Click **Save**
  - vii. Click **File>Save and Release Record (Ctrl+Alt+R)**



# Receiving A Physical Standing Orders

Physical Item Editor

Relink to another bibliographic record

Save and Cancel Save

International taxation in a nutshell / Herzfeld, Mindy, author. West Academic Publishing, St. Paul, MN : 2018 [1640209050]

Holdings

Holdings ID

Barcode

Process type

Milne Library: Circulating Collection; KF6419 .Z9 D64 2018

883838383838

-

Item ID

Status

-

-

View all holdings

View all items

Browse shelf listing

General Information

Barcode

883838383838

Material type

Book

Provenance

PO Line

POL-222

Receiving date

03/07/2019

Enumeration A

Chronology I

Description

Generate

Pages

Replacement cost

Physical condition

Process type

Copy ID

Item policy

Regular Loan

Is magnetic

Issue date

Expected receiving date

Enumeration B

Chronology J

Pieces

Receiving operator

Inventory Number Information

Inventory number

Inventory price

Inventory date

Clear Inventory Information

Location Information

Permanent location \*

Milne Library: Circulating Collection (BOOKM)

Item call number type

Source (Subfield 2)

Storage location ID

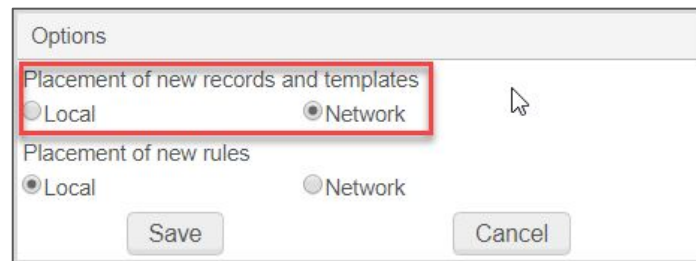
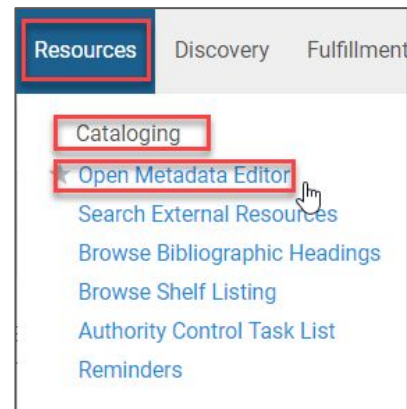
Item call number



# Receiving Standing Orders Not In The NZ

## Manually create a brief bib record option 1

1. Go to **Resources>Cataloging>Open Metadata Editor**
2. Make sure the record will be published to the NZ
  - a. Go to **File>Options** (Ctrl+O) and select Network for the placement of new records
  - b. Got to **File>New>MARC21 Bibliographic**
    - i. Catalog the record
  - c. Click on the **Save** icon
  - d. Create a holdings record
    - i. Click on the **Add Holdings** icon (Ctrl+Alt+H)
    - ii. Save the record
  - e. Create and item record
    - i. Click on the **Add Item** icon (Alt+I)
  - f. Go to **File>Save and Release Record** (Ctrl+Alt+R)





You have 1 warning(s) in your record - Draft saved at 11:00:59 AM.

**Bibliographic**

Working on - Toxic torts in a nut (991058520409104801), Created by admin@01SUNY\_ONE (03/06/2019 21:43:27 EST), Modified by admin@01SUNY\_ONE (03/07/2019 07:15:32 EST)

LDR	00606nam#a2200181#u#4500
001	991058520409104801
005	20190306214630.0
008	190306s2013####xx#####r#####000#0#eng#d
050	4 \$\$a KF1299.H39 #b E37 2019
100	1 \$\$a Eggen, Jean Macchiaroli, \$d 1949- \$e author.
245	1 0 \$\$a Toxic torts in a nutshell / \$\$c Jean Macchiaroli Eggen.
250	\$\$a Sixth edition.
264	1 \$\$a St. Paul, MN : \$\$b West Academic Publishing, \$\$c [2019]
300	\$\$a 1,566 pages ; \$\$c 19 cm.
490	0 \$\$a Nutshell series
650	0 \$\$a Toxic torts \$\$z United States.
760	0 \$\$a Nutshell series \$\$w (OCoLC)785276097
830	0 \$\$a Nutshell series.

Record saved at 11:01:22 AM.

**Holdings**

Working on - Toxic torts in a nut (22118029640004804), Created admin (03/07/2019 11:01:21 EST)

LDR	00160nx##a22000611n#4500
008	1011252u####8###4001uueng0000000
005	20190307110121.0
852	0 \$\$b ONEMN \$\$c BOOKM \$\$h KF1299.H39 #b E37 2019

Physical Item Editor

Relink to another bibliographic recordSave and CancelSave

International taxation in a nutshell / Herzfeld, Mindy, author. West Academic Publishing, St. Paul, MN : 2018 [1640209050]

HoldingsMilne Library: Circulating Collection; KF6419 .Z9 D64 2018

Holdings ID-

Barcode883838383838

Process type-

Item ID-

Status-

View all holdings

View all items

Browse shelf listing

General Information

Barcode883838383838

Material typeBook

Provenance

PO LinePOL-222View Details

Receiving date03/07/2019

Enumeration A

Chronology I

DescriptionGenerate

Pages

Replacement cost

Physical condition

Process type

Copy ID

Item policyRegular Loan

Is magnetic

Issue date

Expected receiving date

Enumeration B

Chronology J

Pieces

Receiving operator

Inventory Number Information

Inventory number

Inventory price

Inventory date

Clear Inventory Information

Location Information

Permanent location \*Milne Library: Circulating Collection (BOOKM)

Item call number type

Source (Subfield 2)

Storage location ID

Item call number

# Receiving Standing Orders Not In The NZ

## Manually create a brief bib record option 2

1. Go to **Resources>Create Inventory>Add Physical Item**
2. Choose Holding Type: [New]
3. Citation Type: [choose Book or Issue]
4. Click **Choose**

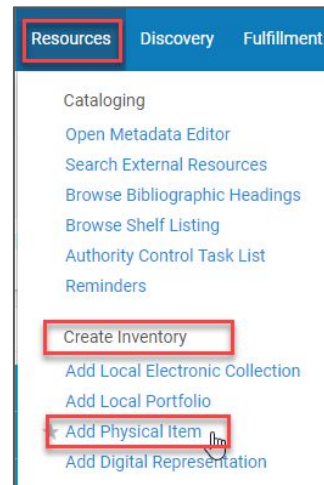
Choose Holdings Type

Choose Holdings Type \* ☐ Existing

☒ New

Citation Type





# Receiving Standing Orders Not In The NZ

Manually create a brief bib record  
option 2 continued

1. Quick Cataloging screen open
  - a. Mandatory fields:
    - i. Title
    - ii. Location
  - b. Optional Fields
    - i. Populate as necessary
  - c. This creates a holding record

Quick Cataloging

Placement of new record

Placement of new record ☒ Network ☐ Institution

Resource Information

Title \* Test title 2 for Maggie's container record

Author McGee, Maggie

Author initials

Edition

ISBN

LCCN

System Control Number

Other standard ID

Barcode

Remote record ID

Publisher SUNY Oneonta

Publication date

Place of publication Oneonta, N.Y.

Additional person name

Source

Series title number

Call number

Note

Volume 2

Part

Chapter number

Pages

Start Page

End Page

Chapter title

Chapter author

Editor

Course Restricted ☐

Suppress from Discovery ☐

Item Information

Location \* Milne Library: Circulating Collection (BOOKM)

Barcode

Material Type

Item policy

Public note

# Receiving Standing Orders Not In The NZ

Manually create a brief bib record  
option 2 continued

1. Click **Items** from the ellipses
  - a. Click **Edit** from the holdings record
  - b. Click **Add Item** (Alt+I)
    - i. Add item record information as in the initial example
  - c. Click **Save**
2. The item is scanned and kept in the Acquisitions department to be fully cataloged
  - a. Process type in the item record

The screenshot shows the 'Physical Item Editor' interface. At the top, there's a header with a back arrow, the title 'Physical Item Editor', and a 'Save' button with a red arrow pointing to it. Below the header, the test title is 'Test title for Maggie's container record McGee, Maggie SUNY Oneonta Oneonta, N.Y. 2019'. The form is divided into several sections: 'General Information', 'Inventory Number Information', 'Location Information', and 'Temporary Location Information'. In the 'General Information' section, the 'Barcode' field is highlighted with a red box and contains the value '18384848548448'. The 'Material type' dropdown is also highlighted with a red box and set to 'Book'. The 'Receiving date' field is highlighted with a red box and contains '03/07/2019'. The 'Item policy' dropdown is highlighted with a red box and set to 'Regular Loan'. The 'Process type' dropdown is highlighted with a red box and set to 'Acquisition technical services', with a red arrow pointing to it. The 'Acquisition technical services' option is also highlighted with a red box. The 'Inventory Number Information' section has fields for 'Inventory number' and 'Inventory price'. The 'Location Information' section has fields for 'Permanent location', 'Item call number type', 'Source (Subfield 2)', and 'Storage location ID'. The 'Temporary Location Information' section is at the bottom.

Physical Item Editor

Test title for Maggie's container record McGee, Maggie SUNY Oneonta Oneonta, N.Y. 2019

Holdings: Milne Library: Circulating Collection;  
Holdings ID: 22118029790004804  
Barcode: 18384848548448  
Process type: Transit

Item ID: 23118029790004804  
Status: Item not in place

View all holdings  
View all items  
Browse shelf listing

General | ENUM/CHRON | Notes | History

General information

Barcode: 18384848548448  
Material type: Book  
Provenance:  
PO Line: POL-222  
Receiving date: 03/07/2019  
Enumeration A:  
Chronology I:  
Description: Generate  
Pages:  
Replacement cost:  
Physical condition:  
Process type: Acquisition technical services

Copy ID:  
Item policy: Regular Loan  
Is magnetic:  
Issue date:  
Expected receiving date:  
Enumeration B:  
Chronology J:  
Pieces:  
Receiving operator:  
AT: ONEMN Acquisitions Department

Inventory Number Information

Inventory number:  
Inventory price:  
Clear Inventory Information

Location Information

Permanent location: Milne Library: Circulating Collection (BOOKM)  
Item call number type:  
Source (Subfield 2):  
Storage location ID:  
Item call number:

Temporary Location Information

# Create A Physical Standing Order Invoice

1. Go to ***Acquisitions>Receiving and Invoicing>Create Invoice***
  - a. Select invoice Creation screen opens
    - i. Invoice creation: **From PO**
    - ii. Click ***Next***

< Select Invoice Creation Process

Invoice Creation

☐ Manually

☒ From PO

☐ From File

Handle Receiving ☐

1 2 Cancel Next

# Create A Physical Standing Order Invoice

2. Select PO screen opens
  - a. Type in the PO number
  - b. Click **Save**

< Select PO

1 — 2

Cancel Save

Select PO \* EBSCO/Default Account - EBSCO-00/PO-1305



# Create A Physical Standing Order Invoice

## 3. The Invoice Details screen opens with the PO details

### a. Click on the **Summary** tab

#### i. Modify the Invoice number

1. The number can only be used once

#### ii. Edit the total amount to reflect cost of the title in hand

The screenshot shows the 'Invoice Details' screen with the 'Summary' tab selected. The 'Total amount' field is highlighted with a red box, and a red arrow points to the 'Save and Continue' button.

**Invoice Details**

Summary Alerts Invoice Lines History Notes Attachments

Invoice number \* PO-1305

Invoice date \* 03/05/2019

Vendor \* EBSCO-00

Vendor account Default Account - EBSCO-00

Total amount \* 100.00 USD

Total invoice lines amount 100.00 USD

Vendor contact person empty (not listed)

Payment method Accounting Department

Invoice reference #

Creation from From PO

Owner Milne Library

# Create A Physical Standing Order Invoice

- c. Click on the **Invoice Lines** tab
  - i. Click Edit from the ellipses for the invoice line
    1. Change the Price under Invoice Line Charges
    2. Change the Amount under Funding
    3. Note: [type in the title of the item in hand]
    4. Click **Save**
    5. Click **Save and Continue**

											code	
1	1	Reg...	500.00 USD	500.00 USD	Approximately 0.00 included in line Total Price.	Ready	Music of the United States of America : MUSA.	Library Continuing Resources LIBR-CONT (100.0%) (FY-2019)	-	POL-211 (Waiting for Renewal)/	Print*Monog... (7031)	...
<div>Edit Delete View hidden</div>												

## Invoice Line Details

Cancel Save

### Invoice Line Charges

Price 100.00

USD

Price note

Release remaining encumbrance

Total price 100.00 USD

Quantity

1

VAT note Approximately 0.00 included in line Total Price.

Reporting code

Print\*Monographs (7031)

Secondary reporting code

Tertiary reporting code

Note Ingalls Wilder Family Songbook

Invoice amount 500.00 USD

Total invoice lines amount -

### Funding

+ Add Fund

Redistribute Lines

#	Fund Name	Fund Code	Percent	Amount		
1	- Library Continuing Resources (FY-2019) (64,462.85 USD)	LIBR-CONT	500.0%	100.00	USD	...
2	Total	-	100.0%		500.00 USD	

Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #	Reporting code
--------	------	-------	-------------	----------	--------	-------------	-------	------	-----------	----------------

1 1

Reg...

100.00 USD

100.00 USD

Approximately 0.00 included in line Total Price.

Ready

Music of the United States of America : MUSA.

Library Continuing Resources  
LIBR-CONT (100.0%) (FY-2019)

Ingalls Wilder Famil...

POL-211 (Waiting for Renewal)/

Print\*Monog... (7031)

...

# Manually Close the Standing Order Invoice

1. Go to ***Acquisitions>Receiving and Invoicing>Waiting for Payment***
  - a. Click on the **Unassigned** tab
  - b. Search by the invoice number
  - c. Click ***Edit*** from the ellipses
    - i. Change the payment information
      1. Payment status: [Paid]
      2. Payment date: [date paid]
      3. Payment identifier: [reference number]
    - ii. Click ***Save and Continue***

# Manually Closing A POL

Manually close a POL when the series is no longer being received

1. Perform a repository search for the title
  - a. Click on the number next to Orders
  - b. Record the POL-###

1 Test title for Maggie's container record  
Book (Book - Physical) By McGee, Maggie (Oneonta, N.Y. SUNY Oneonta 2019)

Language: English  
Update Date: 03/06/2019

Orders: 1  
Requests: 1

Physical (1) Electronic Digital Other details

A red arrow points from the 'Orders: 1' text to the '1' next to 'Requests: 1'.

2. Search by POL-###
  - a. Click **Close** from the ellipses

Order lines PO Line 221

Purchase Order Lines (1 - 1 of 1) 221

Test title for Maggie's container record, Oneonta, N.Y., SUNY Oneonta, 2019,  
MMS ID: 996276729404804  
Assigned to: -  
Type: Print Book - Standing Order  
PO line owner: Milne Library  
Standard number: -  
PO: PO-1504 / (Sent)  
PO line: POL-221 / (Waiting for Renewal)  
Physical Standing Order (0)

Copies: -  
Total price: 500.00 USD  
Funds: Library Monographs (100.0%) (FY-2019)  
Vendor/Account: EBSCO / Default Account - EBSCO-00 EBSCO-00  
Vendor reference ID: -  
Expected delivery: 03/06/2019

Renewal date: 12/31/2019  
Receiving note: -  
Sent date: 03/06/2019  
The bib record is brief, Items already exist in the repository. At least one of the reporting codes is missing

Edit Change Bib Reference ...

Close  
Cancel

A red arrow points from the 'Close' button in the ellipsis menu to the 'Close' button.