



POLARIS ACQUISITIONS

On-Order Item Templates

To create on-order items automatically when purchase orders are released, you must set up on-order item templates. Creating on-order items helps speed up processing of materials when they are received. You can specify whether to display on-order items in the public access catalog where patrons can place hold requests on them, or to display the items after their status changes from On-order to In.

On-Order Item Templates Basics

You set up on-order templates, so that on-order items are created automatically when you release a purchase order that is not for a subscription or standing order. If you choose to create on-order items when you release a purchase order, Polaris attempts to match the values in the fields on the purchase order line item and the values for the corresponding fields in an on-order item template.

Once Polaris finds an item template that has matching values in at least the branch field, the on-order item is created using information from the template and the purchase order.

The matching of item templates against purchase order line item data can occur in two ways:

- Matching branch, collection, and/or material type. On-order templates that do not have a template code are matched to the purchase order line item based on branch, collection and material type. Polaris uses the following logic when looking for a template:
 - Matching on all three fields
 - Matching on branch and collection
 - Matching on branch
 - Matching on multiple templates, the first template found is used to create the item record.
 - Doesn't match on any element – no item record is created.
- Matching the item template code in the template name.
 - If the supplier supports exporting copy-level codes in 970 \$h, you can name on-order templates with this code and use it in the matching process.

If both the on-order item template and the purchase order have data in the same fields, the information in the purchase order line item is used.

In addition, the fund, release date, price, and purchase order number are copied from the purchase order line item to the Source and Acquisitions view of the item record workflow.

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Steps to create on order item templates with matching using Branch, Collection, and/or Material Type

1. Select File>New or click on the New icon.
2. In the object box select **Item Template** in the objects box and click OK.
3. **Name** – the item template must be named **On-order** or **On order** (with or without the hyphen).
4. Since the matching process attempts to match an on-order template to the purchase order line item as outlined above it is critical that the template fields correctly correspond to the Purchase Order Line Item fields.
 - a. **Branch** – the branch field is labeled **Destination** in the Purchase Order Line Item workform and **Assigned** in the Item Template workform
 - b. **Collection**
 - c. **Material Type**

[illegible]

5. These are the remaining required fields:
 - a. **Owner** (the library that owns the item record)
 - b. **Assigned** (assigned branch)
 - c. **Material Type**
 - d. **Loan Period**
 - e. **Fine code**
 - f. **Renewal limit**
 - g. **Stat Code**
 - h. **Scheme** (shelving scheme)
6. Set the remaining template fields as appropriate for your library. For example, does the record **Display in PAC**.

Create a template for every branch, collection, material type combination that is ordered. Use the copy workform workflow to facilitate this step.

Templates with matching via Item Template Codes

An alternative method for libraries importing bibliographic data via 970 codes. The library first defines the copy-level codes on the supplier's material selection Web site.

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The codes can contain at least one alpha or numeric character not to exceed 10 characters.

The basic template steps are the same except the template **Name** must have the matching copy code found in the 970 \$h.

The screenshot shows the 'Item Template 720 - Cataloging - Polaris' window. The 'Name' field contains 'on order WPL Fiction 20WPLFIC'. The 'Template owner' is 'Washburn Public Library (br)'. The 'Material type' is 'Book' and the 'Loan period' is '21 Day'. The 'Scheme' is 'No information'. The 'Request' section has 'Loanable outside system' and 'Holdable' checked. The 'Circulation status' is 'On-Order'.

1. Select File>New or click on the New icon.
2. In the object box select **Item Template** in the objects box and click OK.
3. **Name** – the item template must be named **On-order** or **On order** (with or without the hyphen) and include the **Copy Level Code** stored in the 970 \$h. In the above example the 20WPLFIC is the copy level code.
4. Fill in the **Required** and desired fields.
5. Save

Use the copy workform to make as many copies as needed.

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