

POLARIS ACQUISITIONS

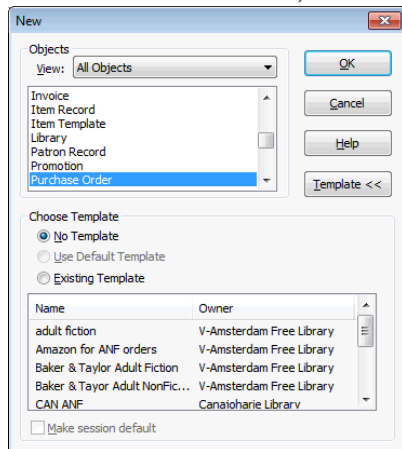
How to Create a Purchase Order (Manual)

Introduction

This article explains how to create a Purchase Order. This is the manual method; in the case the vendor does not supply bibliographic records.

To create a new Purchase Order

From the Polaris toolbar, click on the **New** icon and select Purchase Order.



(If PO Templates have been created, select the appropriate template).

The PO Number can be a mix of numbers/letters, or can be automatically assigned per setting in System Admin.

Attach a supplier (if no template is used). Clicking the **Find** button will open a Supplier Record search.

Purchase Order - 243 - General - Polaris

Numbers: AMS184 gav Status: Pending 2/20/2012
 Type: Firm Order Lines: 1 Total: \$0.00 Method: Purchase

General
 Ordered At: V-Amsterdam Free Library (VAMS)
 SAN: 123-1234
 Authorization:
 Plan name:
 Rental return:
 Supplier: BAKER & TAYLOR BOOKS
 SAN: 155-6150
 Account: E1122

Claim Setup
 Maximum claims: 3 ☒ Claim notice
 Claim waiting period:
 1 30 days after release ☒ Cancel notice
 2 30 days after 1st claim ☐ Auto cancel
 3 45 days after 2nd claim ☐ Cancel wait period
 4 days after 3rd claim
 5 days after 4th claim

Header Charges
 Type: Amount: \$0.00 Fund: VAMS Adult AV (Vanderberg FY 20) Find
 Charge Type Amount Fund Fiscal Year Add Remove

The record was saved successfully. Baker & Taylor Adult Fictic

To create a new POLI,

From the POLI view of a PO, click the **New** icon on the line item toolbar.

Purchase Order - 243 - Line Items - Polaris

Numbers: AMS184 gav Status: Pending 2/20/2012
 Type: Firm Order Lines: 0 Total: \$0.00 Method: Purchase

Line Items

Lin...	Title	Author	ISBN/ISSN	Amount	Ord...	Rec...	Inv...	Fund	Status

The General view will hold the title and its distribution

Use the second view of a POLI, Instructions to Supplier view, to add public or non-public notes. Non-public notes will automatically be added to the non-public note field in the on-order item record and will print on the work slip.

New Purchase Order Line Item - 2 - Instructions To Supplier - Polaris

Order no.: AMS184 gav Status: Pending 2/20/2012 Line no.: 1

Instructions
 Cataloging services: Confirm date:
 Backorder: Quantity:
 Note:

Binding
 Format:
 Substitution:

Claims
 Claim alert date: Maximum claims: Claim waiting period:
 3 1 30 days after release
 Claim cycles: 2 30 days after 1st claim
 3 45 days after 2nd claim
 4 days after 3rd claim
 5 days after 4th claim
☒ Claim notice
☒ Cancel notice
☐ Auto cancel
☐ Cancel wait period

Title
 Title ordered as: Dancing at the Chance
 Rental return date: ☐ Membership

Notes
 Public note:
 Non-public note: Internal cataloging notes

For help, press F1

There are multiple ways to add a title to a manual PO:

1. Type in the ISBN and hit Enter

Training

2. Use the Find button to go to a Find Tool and search for a record that exists in the database or bring a new one in via Z39.50
3. Type in the title

When typing in a brief title and the POLI is saved, by default Polaris creates a book—use the correct on-order bibliographic template to ensure the title will display correctly to patrons in the PAC

Order no.: AMS184 gav Status: Pending 2/20/2012 Line no.: 1

Description: ISBN/ISSN: 9780425245590 Find Control number: 769624 Template: (None)

Title: Dancing at the Chance Author: Cameron, DeAnna.

Publisher: Berkley Books, Date: 2012 Edition: Alert Display in PAC

Other no.: LCON: 2011023859 Material type: (None)

Unit price: \$0.00 Discount rate (%): 0 Discount price: \$0.00 Line item total quantity: 0

Segment	Quantity	Destination	Collection	Fund	Fiscal Year	Segment Sts	Payment Status
1	1	V-Amsterdam Free Library	(None)	VAMS Adult AV (vamsaav)	Vandenberg F	Pending	Open

After the title has been attached, fill in material type and price. (Material type is not a required field; however, it is a match point for item creation via templates. The unit price should be the list price of the book as this gets put in the on-order item record and is the price the patron will be charged should they lose the item.

Order no.: AMS184 gav Status: Pending 2/20/2012 Line no.: 1

Description: ISBN/ISSN: 9780425245590 Find Control number: 769624 Template: (None)

Title: Dancing at the Chance Author: Cameron, DeAnna.

Publisher: Berkley Books, Date: 2012 Edition: Alert Display in PAC

Other no.: LCON: 2011023859 Material type: Book

Unit price: \$12.99 Discount rate (%): 25 Discount price: \$9.74 Line item total quantity: 1

Segment	Quantity	Destination	Collection	Fund	Fiscal Year	Segment Sts	Payment Status
1	1	V-Amsterdam Free Library	(None)	(None)	(None)	Pending	Open

Orders / Charges / Totals

The segment information specifies quantity, destination, collection and funding for copies ordered. Staff may fill in/edit segment information by selecting from drop down lists. To create an additional POLI segment, click the Down Arrow on the line item toolbar or just click in the next segment.

Purchase Order Line Item

Order no.: AMS184 gav Status: Pending 2/20/2012 Line no.: 1

Description: ISBN/ISSN: 9780425245590 Find Control number: 759624 Template: (None)

Title: Dancing at the Chance Author: Cameron, DeAnna

Publisher: Berkley Books, Date: 2012 Edition: Alert Display in PAC

Other no.: LCCN: 2011023899 Material type: Book

Unit price: \$12.99 Discount rate (%): 25 Discount price: \$9.74 Line item total quantity:

Segment	Quantity	Destination	Collection	Fund	Fiscal Year	Segment Sts	Paymel
1	2	V-Amsterdam Free Library	Adult Fiction	VAMS Adult Fiction (vamsaf)	Vanderberg F1	Pending	Open
2	1	V-Arghyle Free Library (VAR)	Adult Fiction	VARG Adult Fiction (vargaf)	Vanderberg F1	Pending	Open
3	1	V-Bancroft Public Library (V)	Adult Fiction	VBAN Adult Fiction (vbanaaf)	Vanderberg F1	Pending	Open
4	1	V-Bolton Free Library (VBO)	Adult Fiction	VBOA Adult Fiction (vboaf)	Vanderberg F1	Pending	Open

Orders Charges Totals

Hint: To quickly copy POLI segments information to the next POLI, click the dropdown arrow next to the **New** icon/ Copy Segment data or use Ctrl + N

Once all tiles have been added to the Purchase Order, double check everything before clicking on the **Release** button. After release, POLIs may not be added or removed.

Line...	Title	Author	ISBN/ISSN	Amount	Orde...	Recei...	Invol...	Fund	Status
1	Creative concrete ornamen...	Hunter, She...	1579905854 (h...	\$139.65	7	0	0	[Multiple]	Pending
2	BEAUTIFUL NO-MOW YARD...	Hadden, Ev...	978160469238...	\$174.65	7	0	0	[Multiple]	Pending
3	HANDMADE GARDEN PROJ...	Forkner, Lor...	978160469185...	\$139.65	7	0	0	[Multiple]	Pending
4	THE RUM DIARY [videoreco...	Depp, Johnny	978631457501...	\$247.92	8	0	0	[Multiple]	Pending
5	TOWER HEIST [videorecord...	Stiller, Ben	978631459992...	\$239.84	8	0	0	[Multiple]	Pending

After releasing the Purchase Order, a pop up will occur, asking “Do you want to generate on-order item records? If yes, make sure that on-order item templates have been created.

Materials can be paid for upon receipt of invoice or prepaid. Click **OK**

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