Polaris: Acquisitions

# Setting up acquisitions

* Workflow overview
* Fiscal year
* Funds
* Suppliers
* EDI (Electronic Data Interchange)
* Web selection tools
* Importing MARC records
* On-order item templates
* On-order bibliographic templates
* PO templates

# Selection lists

* Manually creating selection lists
* Bulk creating selection lists
* Approving selection list titles
* Copying selection lists to a PO

# Purchase orders

* Creating a PO manually and adding POLIs via:
  + ISBN/Find tool
  + Z39.50/Find tool
  + Typing in a title
  + Titles to Go (subscription)
* Updating the POLI and adding segments
* Creating a PO using bulk add
* Releasing POs
* Printing the PO and/or sending via EDI
* Purchase Order Acknowledgments (POA)
* Updating POLI statuses

# Manual receiving and invoicing

* Manual receiving and invoicing options
  + Rapid Receipt
  + Receiving on the PO and copying to an invoice
  + Receiving on the POLI (splitting the POLI) and copying to the invoice
* Balancing invoices
  + Distributing charges
  + Header charges
* Paying invoices
* Printing invoices
* Printing workslips
* Undo receipt of a line item
* Undo invoice payment

# EDI Invoicing

* EDI invoice defaults in System Administration
  + Email
  + Auto-receive
  + Holding back partial shipment invoices
* Advanced Shipping Notice (ASN)
* Preparing for EDI testing
* Other invoicing options

# Other invoicing options

* Misc. invoices
* Creating an invoice without a PO
* Crediting

# Canceling and claiming

* Canceling
* Printing cancellation notices
* Claim alert list
* Printing claim notices

# Fiscal Year Roll-over

* Overview

# Acquisitions reports

* Pre-written reports

# Acquisitions in Leap

* Searching for POs
* Creating a PO using bulk add
* Editing POs, POLI and Segments
* Releasing POs
* Sending POs via EDI
* Searching for Invoices
* Editing Invoices, line and segments
* Paying Invoices
* Unpaying Invoices

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