

## Mixed Manual and EDI Polaris Acquisitions Workflow

<b>Selection</b>	
<b>Manual</b>	<b>Build a cart</b>
Titles are selected from an online catalog, (e.g. Amazon, etc.)	Carts are built in a web selection tool grouping by collection
	Deep linking is used as a duplication detection tool
	Notes are added to the title if needed
	Selector lets acquisitions staff know when a cart is ready
	<p>If MARC output is available, carts are downloaded as order records in MARC format.</p> <ul style="list-style-type: none"> <li>a. If desired, carts may be created in a supplier website from whom the library is NOT ordering, but where it is possible to output MARC Order records. This allows the site to use the bulk add to PO process, but prices must be verified in the resulting PO from the actual supplier pricelist.</li> </ul> <p>If MARC is not available, the cart is printed out to be entered into Polaris</p>

<b>Purchase Orders</b>	
<b>Manual POs</b>	<b>Bulk adding titles to POs</b>
Select a PO template when creating the PO	Import MARC Records into a Record Set
Attach a title one of three ways: 1. Use one from the database 2. Use one OCLC via a Z39.50 connection 3. Type one into the POLI selecting the correct on-order bib template if the item is not a standard book	Bulk Add to PO from Record Set: 1. Use Bulk Add all records to PO if all titles share location, material type, collection and fund  2. Use Bulk Add selected records to PO if different default values are needed for location, material type, collection and fund, so that defaults may be adjusted between bulk adds
When collection and fund differ, use 'copy segment data' to retain updated segment information	
<b>Release the PO in Polaris</b>	
<b>Non-EDI orders</b>	<b>EDI orders</b>
Release the PO—on order items are created	Release the PO—on order items are created
Communicate the order to the vendor (if not already ordered on supplier website).	Go to File/Send to transmit the order via EDI
Print/Save PO if necessary	Print/Save PO if necessary

Receiving and Invoicing	
Non-EDI orders	EDI Orders
Items are unpacked and checked against the invoice/packing slip	Items are unpacked and checked against the invoice/packing slip
Manual receive and invoice in one of the following three ways: <ol style="list-style-type: none"> <li>1. Use Rapid Receipt to receive and invoice at the same time--you must receive all copies ordered</li> <li>2. Receive on the PO or POLI and then copy to an invoice</li> <li>3. Use a combination of the above two</li> </ol>	An email will be sent to defined staff per System Administration EDI Invoice Defaults settings
	Retrieve the invoice, review it, balance and pay it
	Recommended EDI Invoice Default settings: <ol style="list-style-type: none"> <li>1. Turn on auto-receive: <ol style="list-style-type: none"> <li>a. Opt to change status from On-Order to Received in PO Line Item segments</li> <li>b. Opt to change status from on-order to in-process in item records</li> <li>c. Opt to change both</li> </ol> </li> <li>2. Hold Partial Shipment Invoices per the System Administration setting, one of two things can happen: <ol style="list-style-type: none"> <li>a. When all copies of a title are received, the invoice comes all the way into Polaris</li> <li>b. If all copies of a title are not received, the invoice can be manually brought into Polaris using the Process EDI Invoices workform--POLIs are split correctly</li> </ol> </li> </ol>
The invoice is balanced and paid	
Workslips may be printed  Note: If a shorter process list is desired, libraries may display a list of linked bibliographic records from the invoice links menu and select "print list" to know which titles have holds.	

<b>When ASN is used to receive titles:</b>	
	1. Scanning the ASN barcode into the Receive ASN shipments workform will receive all titles/copies within a box-- POLIs are split accordingly
	2. When all titles/copies of an ASN shipment have been received, the invoice will come all the way into Polaris via the EDI agent job the next day
	3. The invoice can also be immediately pulled in using the Process EDI Invoices workform if staff do not want to wait for the EDI agent to run
	Items with holds are flagged
	<p>Workslips may be printed</p> <p>Note: If a shorter process list is desired, libraries may display a list of linked bibliographic records from the invoice links menu and select "print list" to know which titles have holds.</p>

<b>Cataloging</b>	
<b>Z39.50 Record Overlay</b>	<b>OCLC Connexion Record Overlay</b>
A record is retrieved via Z39.50 from OCLC and used to replace the order bib	Records are exported from Connexion and imported into Polaris into a record set
Editing is done in Polaris	Editing can be done in Connexion or Polaris
<b>Linking</b>	
The barcode is scanned into the item record	The barcode is scanned into the item record
Update the item record	Update the item record
Ad hoc item bulk change can be used if multiple items need editing/barcoding	Ad hoc item bulk change can be used if multiple items need editing/barcoding
Spine labels are printed or batch created and saved for later printing	Spine labels are printed or batch created and saved for later printing
<b>Processing</b>	
Physical processing is completed	Physical processing is completed
Items are sent to circulation for check in	Items are sent to circulation for check in
Items are put in-transit and holds are trapped	Items are put in-transit and holds are trapped
<b>Special Considerations for Libraries that have Centralized Receiving and who also Float Collections between Branches</b>	
<ol style="list-style-type: none"> <li>1. In order to preserve the correct assigned branch for newly received materials, choose one of the following options: <ol style="list-style-type: none"> <li>a. Set up a special “New” collection which does not float. If this method is selected, the assigned branches will usually create a “New” display shelf, and items will be bulk changed to their permanent collections after a specified display period.</li> <li>b. Create a virtual receiving branch that does not float. No items will float to the receiving branch when circulation check-in occurs. All items will go in-transit to actual physical branches.</li> </ol> </li> </ol>	

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