Settings - Orders

Video: Order Settings in Edelweiss

Permissions

Describe permissions that apply to the app or section you are outlining. Include default permissions and permission sets; dependencies that exist with permissions in other apps/parts of FOLIO. Describe action-based permissions (if any) that apply to the app or section you are outlining, including permission dependencies and associated functional workflows. Describe what each permission does, in language accessible to non-IT library staff.

UX/UI

Describe out of the box fields, including designed purpose, data requirements and validation, dependencies between fields. Describe out of the box accordion menus, including purpose of the menus, customization options, and associated permission controls (if any). Describe any workflows available through navigation menus, including purpose of the workflow, customization options, and associated permission controls.

Individual Settings

Approvals

Mark this if orders must be approved before they can be opened/sent.

Default is unchecked (approval not required)

Closing purchase order reasons

An order may be closed when it is complete (all expected material received and paid for), cancelled by the library or vendor, or ceased. When an order is closed, a reason for closure can be assigned.

Default reasons are provided by the system and shown here. Additional reasons can be created as needed by the library.

Inventory interaction

When orders are opened, they can automatically create Inventory records (instance, holdings, items). These settings default which inventory record types are create, based on Order format (Electronic resource, Physical resource, P/E mix, Other). The defaults can be changed in Settings, and then can be changed on a case-by-case basis in individual Order templates and Purchase order lines (POLs).

Defaults:

- Electronic resource: Instance, holding
- Physical resource: Instance, holding, item
- P/E mix: no setting (defaults are derived from the individual defaults for Electronic and Physical resources)
- Other: none (no records created in Inventory)

Instance status

Assigns a default instance status to Inventory instances created when orders are Opened

Default: there is no default. If Inventory instance records are to be created from orders, the library must select a default before placing any orders.

Instance type

Assigns a default instance type to Inventory instances created when orders are Opened

Default: there is no default. If Inventory instance records are to be created from orders, the library must select a default before placing any orders.

Loan type

Assigns a default loan type to Inventory item records created when orders are Opened

Default: there is no default. If Inventory item records are to be created from orders, the library must select a default before placing any orders.

Order templates

Users can create as many templates as desired, to default often-used data when creating purchase orders (POs) and purchase order lines (POLs). The templates can contain as much or as little data as the library wants. Templates are shared across all users within a library. When a PO is created, the user can select a template to apply. Once applied, any details flow down to the POL. The template details can be adjusted in individual orders without affecting the template.

There are no default templates. They will be library-specific.
Useful idea from Chalmers. If POL item detail is being harvested from an Inventory instance, add a reminder note in the Title field of the order template:

**Purchase order lines limit**

Indicates how many lines (POLs) are allowed within a purchase order (PO). Some libraries prefer single line POs (so limit = 1). Some libraries prefer to allow multiple lines per order. If a user attempts to add more lines to a PO than the default, FOLIO will show a pop-up and clone the PO for the new line(s) to be added to.

**Opening purchase orders**

Some libraries want to be able to open newly-created orders automatically, so that they do not have to take an additional step to change a pending order to open. If this setting is enabled, then the library will see an option to **Save and open** when creating an order.
Default: unchecked (do not allow orders to be opened at point of creation)

**PO number: Edit**

FOLIO assigns a sequential numeric purchase order number (PO) to newly-created orders. If the library would like users to be able to edit the default PO number, then this setting will allow that. Note that PO prefixes and suffixes are handled in a different setting, so they are not considered part of editing the PO number.

Default: unchecked (users cannot edit the FOLIO-assigned PO number)

**PO number: Prefixes**

Libraries may want to assign prefixes to various kinds of orders, to indicate order type, payment type, location, or other things. In this setting, the library can create a list of acceptable prefixes. These prefixes then display as a dropdown list in order templates and new orders. Users can then select one (or none) of the prefixes to assign to the template or new order. Once assigned and the order is opened, the prefix becomes part of the PO and POL number for the order.

Default: no prefixes

**PO number: Suffixes**

Libraries may want to assign suffixes to various kinds of orders, to indicate order type, payment type, location, or other things. In this setting, the library can create a list of acceptable suffixes. These suffixes then display as a dropdown list in order templates and new orders. Users can then select one (or none) of the suffixes to assign to the template or new order. Once assigned and the order is opened, the suffix becomes part of the PO and POL number for the order.

Default: no suffixes