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Description

Creating a print+online subscription order for a journal

Resources

<https://docs.folio.org/docs/acquisitions/orders/#creating-an-ongoing-order>

Steps

1. If it's a new title:
 - a. For the print version of the journal title, import a bib record from OCLC (see Ordering - Import bib record procedure) or create a brief bib record (see Ordering - Create brief bib record procedure).
 - b. Select **New order** from the **Actions** menu of the **Inventory** app.
 - c. On the pop-up window, leave **PO number** blank, and click **Create**.
 - d. **Create purchase order** screen is displayed. Fill in the fields:
 - i. **Vendor**. Use Organization look-up to select vendor.
 - ii. **Order type**. Ongoing
 - iii. **Acquisition units**. SUL
 - iv. **Bill to**. SUL Acquisitions
 - v. **Ship to**. SUL Serials
 - vi. **Tags**. If the publisher of the journal is one of the Big Deal publishers, select the publisher from the dropdown menu (e.g. sulacq:bigdeal:tandf)
 - e. **Add note**. Short summary of the subscription order including year, volume, and format (e.g. print+online subscription starting with vol.1 2023)
 - f. **Subscription**. Check the box.
 - g. Click **Add POL**.
 - h. **Add PO line** screen is displayed. Item details are filled in automatically.
 - i. Continue with step 3.
2. If there is already a bib rec for the title (print, print+online, online), use that record when creating the order.
 - a. Go to **Orders** app
 - b. Click **Orders** in **Search & filter** pane.
 - c. Select **New** from the **Actions** menu.
 - d. Use template or fill in the fields:
 - i. **Vendor**. Use Organization look-up to select vendor.
 - ii. **Order type**. Ongoing
 - iii. **Acquisition units**. SUL
 - iv. **Bill to**. SUL Acquisitions

- v. **Ship to.** SUL Serials
 - vi. **Tags.** If the publisher of the journal is one of the Big Deal publishers, select the publisher from the dropdown menu (e.g. SULBIGDEAL: TandF)
 - e. **Add note.** Short summary of the subscription order including year, volume, and format (e.g. print+online subscription starting with vol.1 2023)
 - f. **Subscription.** Check the box.
 - g. Click **Save & close.**
 - h. In the **Purchase order** pane, select **Add PO line** from the **Actions** menu of the **PO lines** section.
 - i. Click **Title look-up**, and search for the item by title, ISSN, HRID, etc.
 - j. Title(s) will be displayed in the **Search results** pane. Select the appropriate title. Bibliographic fields will be filled in automatically.
 - k. Continue with step 3.
3. Fill in the fields:
- a. Item details
 - i. **Subscription from.** Enter subscription start date.
 - b. PO line details
 - i. **Acquisition method.** Subscription.
 - ii. **Order format.** P/E mix
 - iii. **Selector.** Selector initials
 - iv. **Receiving workflow.** Independent order and receipt quantity
 - c. Vendor
 - i. **Account number.** If applicable, enter vendor account code (e.g. 22-SER for Harras)
 - ii. **Instructions to vendor.** If the order will be submitted electronically, enter "Please begin a print+online subscription with YYYY to continue until canceled.", any additional instructions, and your contact info (e.g., LIBRARY CONTACT: name & email address).
 - d. Cost details
 - i. **Physical unit price.** Starting with FY25, enter the full subscription price if the vendor is [Harrassowitz](#), enter \$0 for other vendors. For foreign currency amounts, add 4% to the price.
 - ii. **Currency.** Starting with FY25, select the appropriate currency if the amount is in a foreign currency.
 - iii. **Quantity physical.** 1
 - iv. **Electronic unit price.** \$0
 - v. **Quantity electronic.** 1
 - e. Fund distribution (Do not use amount splits)
 - i. Click **Add fund distribution.**
 - ii. **Fund ID.** Select the fund from the drop-down menu.
 - iii. **Value.** The percentage to be charged to the selected fund. 100% if single fund.
 - iv. **Type.** %

- v. Click **Add fund distribution** again (and as many times as needed) if the cost will be divided across multiple funds.
 - f. Location - for physical component
 - i. Click **Add location**.
 - ii. **Name (code) [or Select holdings]**. Select the library location.
 - iii. If library locations are not displayed in the drop-down menu, click **Create new holdings for location**. **Select permanent location** window is displayed. Fill in fields:
 - 1. **Campus**. Stanford Libraries.
 - 2. **Library**. Select library (Cecil H. Green, Cubberley Education, etc.)
 - 3. **Location**. Select location (Green Current Periodicals, etc.)
 - 4. Click **Save and close**.
 - iv. **Quantity physical**. 1
 - g. Location - for electronic component
 - i. Click **Add location**.
 - ii. **Name (code) [or Select holdings]**. Select SUL Electronic.
 - iii. If library locations are not displayed in the drop-down menu, click **Create new holdings for location**. **Select permanent location** window is displayed. Fill in fields:
 - 1. **Campus**. Stanford Libraries.
 - 2. **Library**. Select SUL
 - 3. **Location**. Select SUL Electronic
 - 4. Click **Save and close**.
 - iv. **Quantity electronic**. 1
 - h. Physical resource details
 - i. **Expected receipt date**. The date the first volume is expected to be received. To be used for claiming purposes.
 - ii. **Create inventory**. "Instance, Holdings, Item"
 - iii. **Material type**. Periodical
 - i. E-resources details
 - i. **Expected activation**. The estimated date of activation of access. To be used similar to ELREMIND.
 - ii. **Create inventory**. "Instance, Holdings"
 - iii. **Material type**. Periodical
- 4. Click **Save & close** (if you don't want the order to be opened) or **Save & open order**.
- 5. If **Save & close** was clicked, open the order when it's ready. After verifying the information entered on purchase order and po line, in the **Purchase order** pane, select **Open** from the **Actions** menu.
- 6. Go to the instance record
 - a. Click **View holdings** for Holdings: SUL Electronic.
 - b. Select **Edit** from the **Actions** menu.
 - c. Check **Suppress from discovery** box.
 - d. Select **Electronic** as the **Holdings type**.
 - e. Click **Save and close**.

- f. If a new bib rec is imported/created for the print version:
 - i. Click **View holdings** for the print holdings record.
 - ii. Select **Edit** from the **Actions** menu.
 - iii. Select **Serial** as the **Holdings type**.
 - iv. Click **Save and close**.
7. If the order will be submitted to the vendor via email, select **Print order** from the **Actions** menu. Select **Save to PDF** as the **Destination**, and **Save**. Attach the PDF to the email sent to the vendor.

Additional Notes

- The instance record for the e-version of the journal will be uploaded automatically by MARCIt service, but it will not be linked to the POL. For combo subscriptions, order will be linked only to the print bib record. If we have access to an e-journal and there is no POL linked to it, check if there is a print version of the same title with a linked POL to see if we have a combo subscription for it.
- Regarding the print portion of the subscription, Serials Rec will remove the Expected receipt date when the first issue is received.