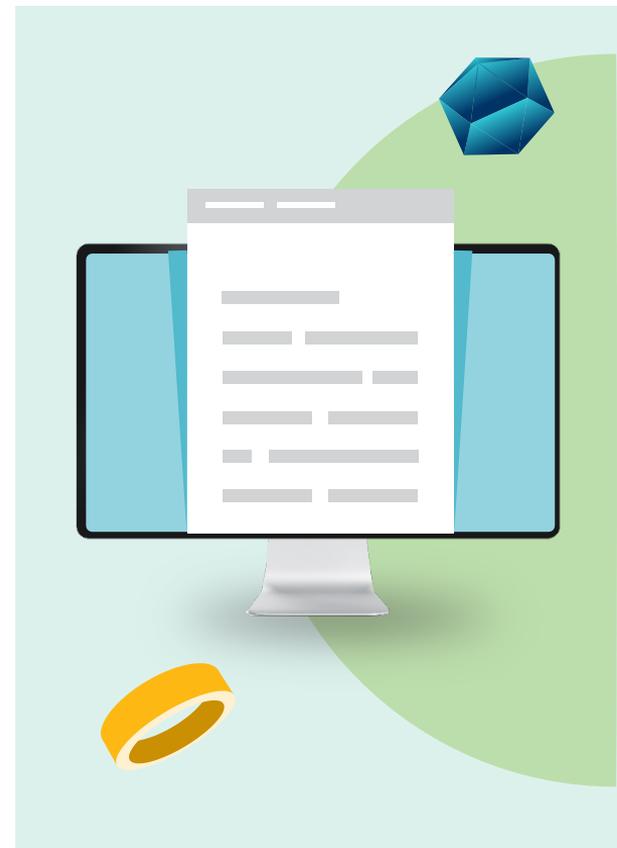




Purchasing, Activating and Invoicing for Electronic Resources

User Roles

- Purchasing manager, operator and operator extended
- Electronic inventory operator, operator extended
- License manager
- Invoice manager, operator and operator extended



Acquisitions Workflow for Electronic Resources

Ordering

Create PO lines, POs, encumber funds, and generate inventory; may originate from EOD

Activating

Electronic: Activate, test access, make available

Invoicing

Funds are disencumbered and expended; order payment may be requested; invoice may be loaded via EDI

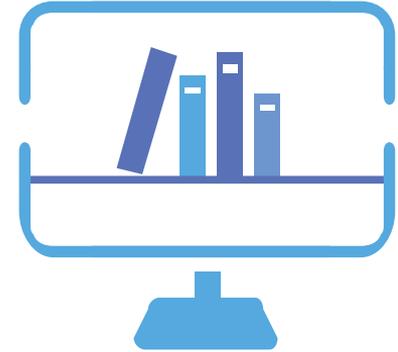


Purchase Order Lines

Purchase Order Lines

PO lines (POLs):

- Create inventory
- Encumber funds
- Are bundled into Purchase Orders and sent via email or EDI
- Trigger
 - e-activation tasks (electronic)
 - invoicing
 - claims
- Can launch other workflows (e.g., trials, renewals, etc.)

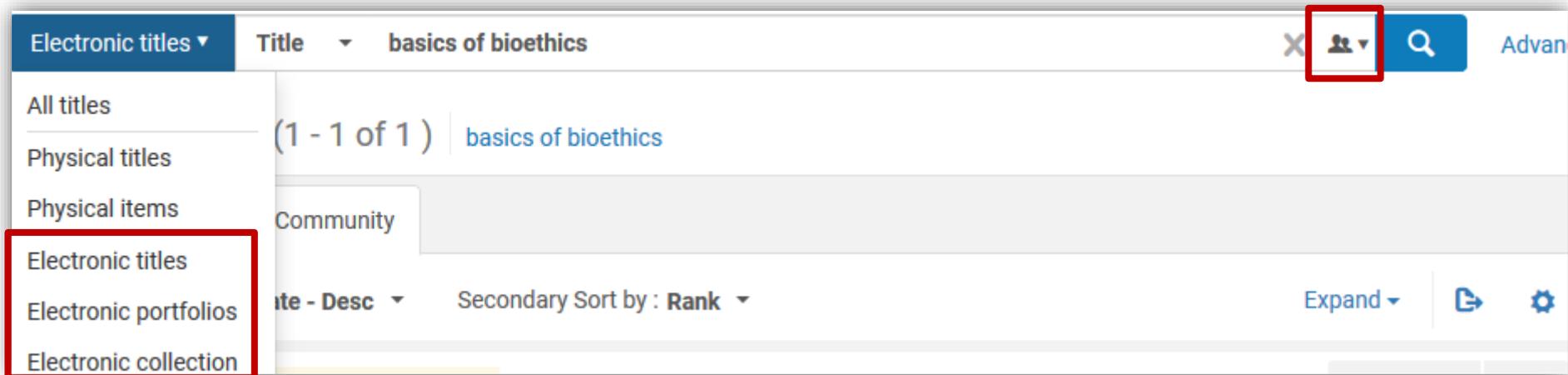


Choosing Purchase Type for Electronic Resources

One-Time	Continuous / Subscription	Standing
<p>Closed when invoiced/activated</p> <p>Standard activation; activated indefinitely</p> <p>Use for single-payment e-resources</p>	<p>Open until canceled</p> <p>Standard activation; can be activated for range of subscription</p> <p>Use for e-resource subscriptions</p>	<p>N/A; use electronic subscription</p>

Manually Creating a Purchase Order Line (POL) – 1

- We begin our search for information in a different place when ordering Electronic Resources
- Using the *Community Zone*, we can search for Electronic titles, portfolios or collections



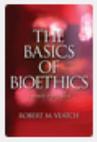
The screenshot shows a search interface with a search bar containing the text "basics of bioethics". A dropdown menu is open on the left, listing search filters: "All titles", "Physical titles", "Physical items", "Electronic titles", "Electronic portfolios", and "Electronic collection". The "Electronic titles" option is highlighted with a red box. In the top right corner of the search bar area, a small icon representing a group of people (the Community Zone icon) is also highlighted with a red box. The search results area shows "(1 - 1 of 1)" and "basics of bioethics". Below the search bar, there are sorting options: "Date - Desc" and "Secondary Sort by : Rank".

Manually Creating a Purchase Order Line (POL) – 2

Electronic Titles (1 - 1 of 1) | [basics of bioethics](#)

[Institution](#) | [Community](#)

Sort by : **Publication Date - Desc** ▾ Secondary Sort by : **Rank** ▾ [Expand](#) ▾ [Share](#) [Settings](#)

1  **The basics of bioethics / Robert M. Veatch.** [Portfolio List](#) [Order](#)

Book By Veatch, Robert M., (London, [England] ; Routledge, 2016)
Edition: 3rd ed.

ISBN: 0-13-600441-5 and others
Record number: (CKB)3710000000685228

Language: English
Update Date: -

Electronic (5)

5 Portfolios | 0 of 5 portfolios are available

Collection Name	Service Type
EBSCOhost Ebooks	Full Text
Dawsonera	Full Text
Taylor & Francis eBooks Complete	Full Text
Taylor & Francis Philosophy eBooks	Full Text
Ebook Central Perpetual and DDA Titles	Full Text

[Portfolio List](#)

Manually Creating a Purchase Order Line (POL) – 3

Portfolios List (1 - 5 of 5) Cancel

Portfolio list for: The basics of bioethics / [0-205-76562-9]

Electronic Collection Name 🔗 ⚙️

1	Dawsonera: Full Text	Creation Date: 2016-06-12 02:06:15 Modification Date: 2016-06-12 02:06:15	Activate Order ⋮
2	Ebook Central Perpetual and DDA Titles: Full Text	Creation Date: 2016-07-10 02:47:41 Modification Date: 2016-07-10 02:47:41	Activate Order ⋮
3	EBSCOhost Ebooks: Full Text	Creation Date: 2016-06-05 01:22:06 Modification Date: 2016-06-05 01:22:06	Activate Order ⋮
4	Taylor & Francis eBooks Complete: Full Text	Creation Date: 2017-11-19 03:12:35 Modification Date: 2017-11-19 03:12:35	Activate Order ⋮
5	Taylor & Francis Philosophy eBooks: Full Text	Creation Date: 2017-11-19 03:14:30 Modification Date: 2017-11-19 03:14:30	Activate Order ⋮

Manually Creating a Purchase Order Line (POL) – 4

Purchase type defines:

- Inventory format
 - Physical
 - Electronic
- Continuity
 - One-time
 - Continuous
- Acquisition/item material type

PO Line Owner and Type

1 Taylor & Francis eBooks Complete: Full Text
Creation Date: 2017-11-19 03:12:35 Modification Date: 2017-11-19 03:12:35

Description * **The basics of bioethics / Robert M. Veatch.**

Purchase type * **Recommended: Electronic Book - One Time**

PO line owner * **Science Library**

Load from template

Manually Creating a Purchase Order Line (POL) – 5

Purchase Order Line Details

Order Line POL-8018 Order - Status In Review (2019-01-21)
Order line type Electronic Book - One Time PO line owner Science Library Sent date -

Summary Description Alerts Invoice Lines Associated PO Lines Communications Interested Users History Notes Attachments

Ordered Items

License Select from a list View license

Name	Type	Activation Status	Activation Date	Additional PO Line
1 The basics of bioethics /	Book	Not active	-	

Vendor Information

Material supplier * Wiley-Blackwell/WIBL/Wil Access provider
Claiming grace period (days) 0 Expected activation after ordering (days) 0
Or expected activation date E-Activation due after ordering (days) 30

Pricing

List price * 32.50 Net price 32.50 USD
Quantity for pricing * 1 Discount (%) 0.0

Funding

+ Add Fund - Redistribute Lines

#	Fund Name	Fund Code	Percent	Amount
1	E Sciences (2018/06/30 - 2019/06/29) (80,283.10 USD)	ESCI	100.0%	32.50 USD

Manually Creating a Purchase Order Line (POL) – 6

PO Line Details

Acquisition method	Purchase at Vendor System	Material type	Recommended: Book
Invoice status	No invoice	Reporting code	Sciences
Secondary reporting code	Biological Sciences	Tertiary reporting code	Electronic Resources
Rush	<input type="checkbox"/>	Manual packaging	<input type="checkbox"/>
Cancellation restriction	<input type="checkbox"/>	Cancellation restriction note	
Identifier	0-13-600441-5	Proposed identifier	
Vendor reference number		Vendor reference number type	
Note to vendor		Vendor invoice number	-



Activating Electronic Resources

Activating Electronic Resources



To activate Electronic Resources, the role of Electronic Inventory Operator must be assigned

- Depending on the organization and practices at your institution, how you proceed through receiving and invoicing workflows may vary
 - At some institutions, the activation workflow for electronic resources is performed by one operator while another operator is responsible for the invoicing workflow
 - At other institutions, one operator performs both tasks

Activating Electronic Resources – One-Time Orders

Electronic Resource Activation Task List

Assigned to Me

Unassigned

Assigned to Others

1 - 5 of 5

Title



Change Status



Status: **Opened Tasks** PO Line Owner: **All** Expected Activation Date: **All** Filter orders with interested users: **No** [Clear all](#)

<input type="checkbox"/>	MMS ID	Title	Type	Status	Status Date	Due Date	Expected Activation Date	PO Line Owner	Order Line	Interested Users
<input type="checkbox"/>	99212641300521	The Middle Ages in 50 Objects	Portfolio	Check Access	07/06/2018	08/05/2018	07/06...	Science Library	POL-7950	
<input type="checkbox"/>	99212641200521	KB+ Eduserv Emerald Management 2015-2017 (150 Titles)	Selective package	Check Access	07/06/2018	08/05/2018	07/06...	Graduate Library	POL-7952	
<input type="checkbox"/>	99214241100521	Atom land : a guided tour through the strange (and impossibly small) world of particle physics /	Book	Check Access	11/16/2018	12/16/2018	11/16...	Main Library	POL-7994	
<input type="checkbox"/>	99214241300521	The feather thief : beauty, obsession, and the natural history heist of the century /	Portfolio	Check Access	11/16/2018	12/16/2018	11/16...	Science Library	POL-7992	
<input type="checkbox"/>	99214841500521	The basics of bioethics /	Book	Check Access	01/21/2019	02/20/2019	01/21...	Science Library	POL-8018	

- View
- Edit
- Edit Resource
- Test Access
- Activate
- Assign to
- Done
- Delete
- View hidden

Activating Electronic Resources – One-Time Orders

Confirmation Message

You are about to activate the service – are you sure you want to continue?

Cancel

Confirm

Activation Feedback

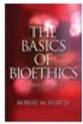
'Atom land : a guided tour through the strange (and impossibly small) world of particle physics /' is now available. Do you want to edit it?

Cancel

Confirm

Activating Electronic Resources – One-Time Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **The basics of bioethics / Veatch, Robert M., author. Routledge, London, [England] ; 2016 [1-315-51003-0]** i v

Collection name	Taylor & Francis eBooks Complete	Collection ID	6180410000000521	View all the collection's por...
Service type	Full Text	Service ID	6280409990000521	View all the collection's ser...
Provider package code (DB id)	ADZUX,AOPGU,APURA,ATVQN,AUIISK,BEMEX,B...	Portfolio ID	5380409960000521	
		Bib material type	Book	

General | Linking | Coverage | Acquisition | Notes | History

Portfolio availability Not Available Available

Electronic material type originating from Bib (to be deprecated) **Book**

Electronic material type

Activation date 01/21/2019 X 📅

Expected activation date 01/21/2019

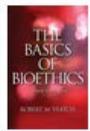
Library **Science Library** X ☰

Electronic collection access type **Current**

Access type

Activating Electronic Resources – One-Time Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **The basics of bioethics / Veatch, Robert M., author. Routledge, London, [England] ; 2016 [1-315-51003-0]** i ▼

Collection name	Taylor & Francis eBooks Complete	Collection ID	6180410000000521	View all the collection's por...
Service type	Full Text	Service ID	6280409990000521	View all the collection's ser...
Provider package code (DB id)	ADZUX,AOPGU,APURA,ATVQN,AUIISK,BEMEX,B...	Portfolio ID	5380409960000521	
		Bib material type	Book	

General **Linking** Coverage Acquisition Notes History

Parser (service level) **TAYFRA::BOOK**

Service parser parameters **url=https://www.taylorfrancis.com**

Parser parameters (override)

parser parameters **bkey=9781315510057**

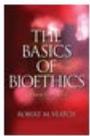
URL type Static URL Dynamic URL Parser Parameters

Proxy enabled No Yes

Proxy selected

Activating Electronic Resources – One-Time Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **The basics of bioethics / Veatch, Robert M., author. Routledge, London, [England] ; 2016 [1-315-51003-0]** i ▼

Collection name	Taylor & Francis eBooks Complete	Collection ID	6180410000000521	View all the collection's po...
Service type	Full Text	Service ID	6280409990000521	View all the collection's ser...
Provider package code (DB id)	ADZUX,AOPGU,APURA,ATVQN,AUIISK,BEMEX,B...	Portfolio ID	5380409960000521	
		Bib material type	Book	

General | **Linking** | **Coverage** | Acquisition | Notes | History

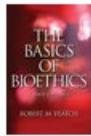
Which coverage statement will be applied?
 Only local Global and local Global or local Only global

Global Date Information ▼


No relevant information.

Activating Electronic Resources – One-Time Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **The basics of bioethics / Veatch, Robert M., author. Routledge, London, [England] ; 2016 [1-315-51003-0]** i v

Collection name	Taylor & Francis eBooks Complete	Collection ID	6180410000000521	View all the collection's po...
Service type	Full Text	Service ID	6280409990000521	View all the collection's ser...
Provider package code (DB id)	ADZUX,AOPGU,APURA,ATVQN,AUIISK,BEMEX,B...	Portfolio ID	5380409960000521	
		Bib material type	Book	

General Linking Coverage **Acquisition** Notes History

Electronic collection -
PO Line -
PO Line X ⋮

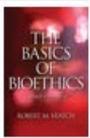
PO Line details **POL-8018**

Electronic collection license -
License ⋮

View license details -
PDA ⋮

Activating Electronic Resources – One-Time Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **The basics of bioethics / Veatch, Robert M., author. Routledge, London, [England] ; 2016 [1-315-51003-0]** i ▼

Collection name	Taylor & Francis eBooks Complete	Collection ID	6180410000000521	View all the collection's po...
Service type	Full Text	Service ID	6280409990000521	View all the collection's ser...
Provider package code (DB id)	ADZUX,AOPGU,APURA,ATVQN,AUIISK,BEMEX,B...	Portfolio ID	5380409960000521	
		Bib material type	Book	

General | **Linking** | **Coverage** | **Acquisition** | **Notes** | **History**

Functional Notes ▼

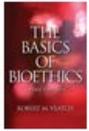
Authentication note

Public note

Internal description

Activating Electronic Resources – One-Time Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **The basics of bioethics / Veatch, Robert M., author. Routledge, London, [England] ; 2016 [1-315-51003-0]** i ✓

Collection name Taylor & Francis eBooks Complete **Collection ID** 618041000000521 [View all the collection's por...](#)
Service type Full Text **Service ID** 6280409990000521 [View all the collection's ser...](#)
Provider package code (DB id) ADZUX,AOPGU,APURA,ATVQN,AUI SK,BEMEX,B... **Portfolio ID** 5380409960000521
Bib material type Book

General Linking Coverage Acquisition Notes **History**

Field name 📄 ⚙️

▼ Date	↕ Operator	↕ Field Name	Old Value	New Value
1 01/21/2019 10:52:11 CST	EresMgr 	Activation date	-	2019-01-21
2 01/21/2019 10:52:11 CST	EresMgr 	Availability	Not Available	Available
3 01/21/2019 10:43:34 CST	System	Expected arrival date	-	2019-01-21

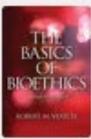
Activating Electronic Resources – One-Time Orders

Electronic titles ▾ Title ▾ basics of bioethics X Home ▾ Search Advanced ▾

Electronic Titles (1 - 1 of 1) basics of bioethics Save Query

Home Institution Community

Sort by: Publication Date - Desc ▾ Secondary Sort by: Rank ▾ Expand ▾

1  **The basics of bioethics / Robert M. Veatch.** Edit Record Order ...

Book By Veatch, Robert M., (London, [England] ; Routledge, 2016)
Edition: 3rd ed. **Language:** English **Orders:** 1
ISBN: 0-13-600441-5 and others
Record number: (CKB)3710000000685228
Update Date: 01/21/2019

Electronic (1) Other details

1 Portfolio | 1 of 1 portfolios are available

Interface Name	Collection Name	Service Type	Availability	Portfolio
Taylor & Francis eBooks	Taylor & Francis eBooks Complete	Full Text	● Active	View

Portfolio List

Activating Electronic Resources – One-Time Orders

Electronic Resource Activation Task List

Assigned to Me Unassigned Assigned to Others

1 - 2 of 2 Title [] [] Change Status [] [] []

Status: **Opened Tasks** PO Line Owner: **All** Expected Activation Date: **All** Filter orders with interested users: **No** Clear all

<input type="checkbox"/>	MMS ID	Title	Type	Status	Status Date	Due Date	Expected Activation Date	PO Line Owner	Order Line	Interested Users
1 <input type="checkbox"/>	99212941000521	Cities and mega-cities : problems and solution strategies /	Portfolio	Check Access	07/31/2018	08/30/2018	07/31...	Graduate Library	POL-7973	[...]
2 <input type="checkbox"/>	99214841500521	The basics of bioethics /	Book	Check Access	01/21/2019	02/20/2019	01/21...	Science Library	POL-8018	[...]

- View
- Edit
- Edit Resource
- Test Access
- Assign to
- Release assignment
- Done**
- Delete

Activating a Single Electronic Journal – Continuous Orders

Electronic Resource Activation Task List Cancel

Assigned to Me **Unassigned** Assigned to Others

1 - 4 of 4 Title

Change Status

Status: **Opened Tasks** PO Line Owner: **All** Expected Activation Date: **All** Filter orders with interested users: **No**

<input type="checkbox"/>	MMS ID	Title	Type	Status	Status Date	Due Date	Expected Activation Date	PO Line Owner	Order Line	Interested Users
<input type="checkbox"/>	99212641300521	The Middle Ages in 50 Objects	Portfolio	Check Access	07/06/2018	08/05/2018	07/06...	Science Library	POL-7950	<input type="button" value="⋮"/>
<input type="checkbox"/>	99212641200521	KB+ Eduserv Emerald Management 2015-2017 (150 Titles)	Selective package	Check Access	07/06/2018	08/05/2018	07/06...	Graduate Library	POL-7952	<input type="button" value="⋮"/>
<input type="checkbox"/>	99214241100521	Atom land : a guided tour through the strange (and impossibly small) world of particle physics /	Book	Check Access	11/16/2018	12/16/2018	11/16...	Main Library	POL-7994	<input type="button" value="⋮"/>
<input type="checkbox"/>	9926620500521	Journal of voice	Journal	Check Access	01/22/2019	02/21/2019	01/22...	Music Library	POL-8020	<input type="button" value="⋮"/>

Activating a Single Electronic Journal – Continuous Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **Journal of voice** Journal of voice (Online) Elsevier Science [Amsterdam ; Print began with vol. 1, no. 1 (Mar. 1987). [1873-4588] i v

Collection name	ProQuest Music & Performing Arts Collection	Collection ID	6180409930000521	View all the collection's por...
Service type	Full Text	Service ID	6280409920000521	View all the collection's ser...
Provider package code (DB id)	DJMCT	Portfolio ID	5380409900000521	
		Bib material type	Journal	

General | Linking | Coverage | Acquisition | Notes | History

Portfolio availability Not Available Available

Electronic material type originating from Bib (to be deprecated) **Journal**

Electronic material type **Journal**

Activation date **01/22/2019** X 📅

Expected activation date **01/22/2019**

Library **Music Library** X ☰

Electronic collection access type **Current**

Access type

Activating a Single Electronic Journal – Continuous Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 Journal of voice Journal of voice (Online) Elsevier Science [Amsterdam ; Print began with vol. 1, no. 1 (Mar. 1987). [1873-4588] ⓘ ▾

Collection name	ProQuest Music & Performing Arts Collection	Collection ID	6180409930000521	View all the collection's por...
Service type	Full Text	Service ID	6280409920000521	View all the collection's ser...
Provider package code (DB id)	DJMCT	Portfolio ID	5380409900000521	
		Bib material type	Journal	

General **Linking** Coverage Acquisition Notes History

Parser (service level) **PROQUEST::open**

Service parser parameters **url=http://gateway.proquest.com/openurl & clientid=\$\$CLIENTID & url2=https://search.proquest.com**

Parser parameters (override)

parser parameters **jkey=5383**

URL type Static URL Dynamic URL Parser Parameters

Proxy enabled No Yes

Proxy selected

Test access

Activating a Single Electronic Journal – Continuous Orders

Electronic Portfolio Editor

Relink to another bibliographic record

Cancel

Save



Journal of voice Journal of voice (Online) Elsevier Science [Amsterdam ; Print began with vol. 1, no. 1 (Mar. 1987). [1873-458] v

Collection name ProQuest Music & Performing Arts Collection
Service type Full Text
Provider package code (DB id) DJMCT

Collection ID 6180409930000521
Service ID 6280409920000521
Portfolio ID 5380409900000521
Bib material type Journal

[View all the collection's po...](#)
[View all the collection's ser...](#)

General

Linking

Coverage

Acquisition

Notes

History

Which coverage statement will be applied?

Only local Global and local Global or local Only global

Global Date Information

From Year	From Month	From Day	From Volume	From Issue	Until Year	Until Month	Until Day	Until Volume	Until Issue
1	1996	-	-	-	2004	-	-	-	-

Activating a Single Electronic Journal – Continuous Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 **Journal of voice** Journal of voice (Online) Elsevier Science [Amsterdam ; Print began with vol. 1, no. 1 (Mar. 1987). [1873-458] ⓘ ▼

Collection name	ProQuest Music & Performing Arts Collection	Collection ID	6180409930000521	View all the collection's po...
Service type	Full Text	Service ID	6280409920000521	View all the collection's ser...
Provider package code (DB id)	DJMCT	Portfolio ID	5380409900000521	
		Bib material type	Journal	

General | **Linking** | **Coverage** | **Acquisition** | **Notes** | **History**

Electronic collection PO Line -

PO Line ✕ ☰

PO Line details **POL-8020**

Electronic collection license -

License ☰

View license details -

PDA ☰

Activating a Single Electronic Journal – Continuous Orders

Electronic Portfolio Editor Relink to another bibliographic record Cancel Save

 Journal of voice Journal of voice (Online) Elsevier Science [Amsterdam ; Print began with vol. 1, no. 1 (Mar. 1987). [1873-4588] ⓘ ▼

Collection name ProQuest Music & Performing Arts Collection **Collection ID** 6180409930000521 [View all the collection's por...](#)
Service type Full Text **Service ID** 6280409920000521 [View all the collection's ser...](#)
Provider package code (DB id) DJMCT **Portfolio ID** 5380409900000521
Bib material type Journal

General Linking Coverage Acquisition Notes **History**

Field name

▼ Date	↕ Operator	↕ Field Name	Old Value	New Value
1 01/22/2019 09:00:31 CST	EresMgr ⓘ	Activation date	-	2019-01-22
2 01/22/2019 09:00:30 CST	EresMgr ⓘ	Availability	Not Available	Available
3 01/22/2019 08:54:58 CST	System	Expected arrival date	-	2019-01-22
4 01/22/2019 08:54:55 CST	EresMgr ⓘ	Interface name	-	ProQuest Company

Activating Electronic Collections – Continuous Orders

Electronic Resource Activation Task List

Assigned to Me

Unassigned

Assigned to Others

1 - 4 of 4

Title



Change Status



Status: **Opened Tasks** PO Line Owner: **All** Expected Activation Date: **All** Filter orders with interested users: **No** Clear all

<input type="checkbox"/>	MMS ID	Title	Type	Status	Status Date	Due Date	Expected Activation Date	PO Line Owner	Interested Users
<input type="checkbox"/>	99212641300521	The Middle Ages in 50 Objects	Portfolio	Check Access	07/06/2018	08/05/2018	07/06/...	Science Library	
<input type="checkbox"/>	99212641200521	KB+ Eduserv Emerald Management 2015-2017 (150 Titles)	Selective package	Check Access	07/06/2018	08/05/2018	07/06/...	Graduate Library	
<input type="checkbox"/>	99214241100521	Atom land : a guided tour through the strange (and impossibly small) world of particle physics /	Book	Check Access	11/16/2018	12/16/2018	11/16/...	Main Library	POL-7994 
<input type="checkbox"/>	99214841400521	OECD Science and Information Technology iLibrary	Selective package	Check Access	01/22/2019	02/21/2019	01/22/...	Science Library	POL-8021 

- View
- Edit
- Edit Resource
- Test Access
- Activate**
- Assign to
- Done
- Delete
- View hidden



Activating Electronic Collections – Continuous Orders

Activation Wizard: Electronic Collection and Services Setup

1 ? Cancel Next

OECD Science and Information Technology iLibrary

Type Selective package
Number of portfolios 579
Electronic Collection Level URL -
Additional descriptive information OECD Science and Information Technology iLibrary

Local Electronic Collection Information

Public name

Level URL

Additional descriptive information OECD Science and Information Technology iLibrary X

Mark Bib as suppressed

Electronic Collection Proxy Enabled No Yes

Electronic Collection Proxy Selected

Full Text Service

Activate this electronic collection service

Make service available

Automatically activate new portfolios

Active from date 01/22/2019 X

Active until date

Service public name

Service Public Note

Service Authentication Note

Activating Electronic Collections – Continuous Orders

Activation Wizard: Linking Information

1 2 3 ? Cancel Back Next

OECD Science and Information Technology iLibrary

Type	Selective package
Number of portfolios	579
Electronic Collection Level URL	-
Additional descriptive information	OECD Science and Information Technology iLibrary

Full Text Service - Proxy setup

Proxy enabled No Yes

Proxy selected: Default(currently: none selected)

Activation Wizard: Select Activation Method

1 2 3 ? Cancel Back Next

OECD Science and Information Technology iLibrary

Type	Selective package
Number of portfolios	579
Electronic Collection Level URL	-
Additional descriptive information	OECD Science and Information Technology iLibrary

Activation Type

- Activate all - Activation of the complete electronic collection with no selection of portfolios
- Activate electronic collection and selected portfolios via Excel file upload
- Manual activation - activate electronic collection and manually select portfolios

Activating Electronic Collections – Continuous Orders

Activation Wizard: Activation Summary

1 2 3 4 Cancel Back Activate

OECD Science and Information Technology iLibrary

Type Selective package
Number of portfolios 579
Electronic Collection Level URL -
Additional descriptive information OECD Science and Information Technology iLibrary

Activation Summary

Services	Full Text
Number of portfolios to be activated	579
Additional activation count (electronic collection + service)	2



Creating Invoices

Creating Invoices

- Manage how an invoice is handled from point of receipt to point it is paid
- Invoices can be created in several different ways
- Activation may not be handled as part of the workflow
- If an option at your institution, payment requests may be exported to the institution's ERP system
- Lifecycle of the invoice depends on your needs for review and exporting to a financial system



Creating Invoices

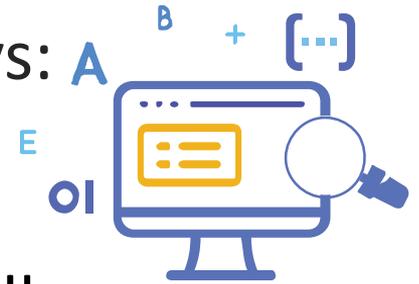
Invoices may be created in one of four ways:

Manually

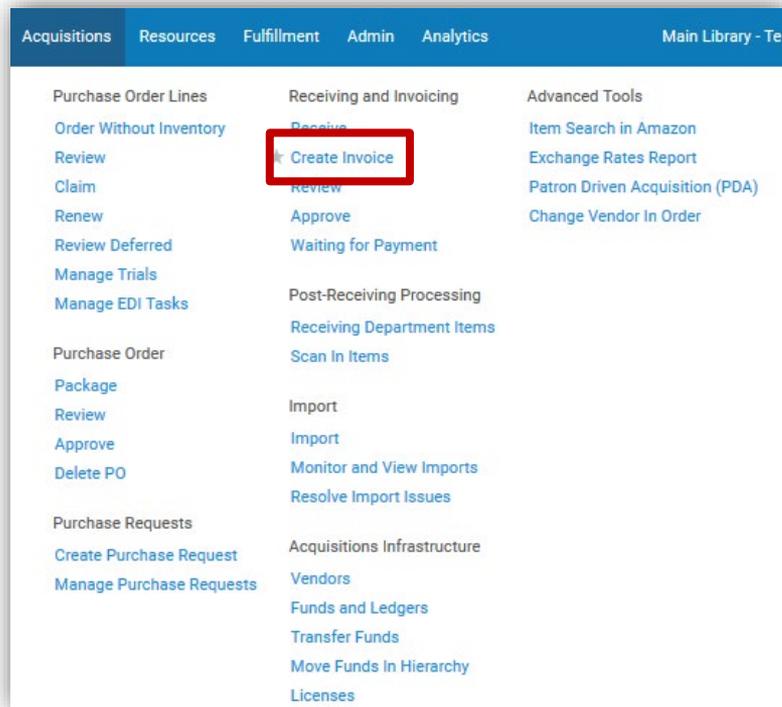
1. By entering the invoice details manually
2. From the PO using the PO details
3. From an Excel file, that uses a very specific format

Automatically

4. Via Electronic Data Interchange (EDI)



Manually Creating an Invoice



Manually Creating an Invoice – 1

Select Invoice Creation Process 1 ? Cancel Next

Invoice Creation

Manually

From PO

From File

Select PO 1 2 Cancel Back Save

Select PO * ⋮

Wiley-Blackwell/Wiley-Blackwell/PO-18513

Invoice Details Save Cancel Save and Continue

PO-18513 i ⌵

Unique invoice identifier	1337311980000521	Owner	-	Vendor	WIBL
Approved by	- (-)	Status	Pending	Total amount	32.50 USD
Total invoice lines amount	-				

Manually Creating an Invoice – 2

PO-18513 i v

Unique invoice identifier	1337311980000521	Owner	-	Vendor	WIBL
Approved by	- (-)	Status	Pending	Total amount	32.50 USD
Total invoice lines amount	-				

Summary Alerts **Invoice Lines** History Notes Attachments

1 - 5 of 5 + Add Invoice Line

Status: All Type: All

Line #	Type	Price	Total Price	VAT Note	Status	Description	Funds	Note	PO Line #
1 1	Reg...	32.50 USD	32.50 USD	-	Ready	The basics of bioethics / Robert M. Veatch. (Taylor & Francis eBooks Complete)	E: Sciences ESCI (100.0%) (2018/06/30 - 2019/06/29)	-	POL-8018 (Sent)/
2 999991	Ship...	0.00 USD	0.00 USD	-	In-Review	-	-	-	-
3 999992	Disc...	0.00 USD	0.00 USD	-	In-Review	-	-	-	-

Manually Creating an Invoice – 3

Invoice Details Save Cancel Save and Continue

PO-18513 i ▼

Unique invoice identifier	1337311980000521	Owner Status	Science Library Pending	Vendor	WIBL
Approved by	- (-)			Total amount	32.50 USD
Total invoice lines amount	32.50 USD				

Summary Alerts Invoice Lines History Notes Attachments

Invoice Details ▼

Invoice number *	PO-18513	Invoice date *	01/23/2019 ✕ 📅
Vendor *	WIBL ✕ ⋮	Vendor account	Wiley-Blackwell ▼
Total amount *	32.50 USD ▼	Total invoice lines amount	32.50 USD
Vendor contact person	- ▼	Payment method	Accounting Department ▼
Invoice reference #		Creation from	From PO

Owner Science Library

Invoice Workflow Considerations

Some considerations...



- Do you export/import invoices to/from an ERP?
- Do you invoice via EDI?
- Do staff operators to have separate invoicing roles or does one staff operator perform all tasks?
- Do you have an Invoice approval process?

Invoice Review Rules and Invoice Approval Rules may be configured to handle any of these options

Create Invoice – Fund Transaction

After an invoice is created, two transactions are entered in the fund to complete the purchase process:

- Disencumbrance
- Expenditure

Transactions

E: Sciences

Code ESCI
Fiscal period 2018/06/30 - 2019/06...
Allocated Balance 133,544.28 USD

Available Balance 79,671.60 USD
Expenditure Balance 116.39 USD

Cash Balance 133,427.89 USD
Encumbered Balance 53,756.29 USD

Summary Transactions Notes Attachments

1 - 20 of 36 PO Line

Filter: All

Time	Type	Related record	Amount	Payment date	Reporting code	Transaction reference	Notes
01/23/2019 10:00:25 CST	Expenditure	PO Line:POL-8018 Invoice Line: PO-18018,(1)	32.50 USD	-	Sciences	-	...
01/22/2019 11:02:12 CST	Encumbrance	PO Line:POL-8021	579.00 USD	-	Sciences	-	...
01/21/2019 10:36:10 CST	Disencumbr...	PO Line:POL-8018	32.50 USD	-	-	-	...
01/21/2019 10:36:10 CST	Encumbrance	PO Line:POL-8018	32.50 USD	-	Sciences	-	...

Acquisitions Workflow for Electronic Resources

Ordering

Purchase Order Lines (created)
Funds (updated with encumbrance)
Purchase Orders (created)
Inventory (created)

Activating

Inventory (updated)

Invoicing

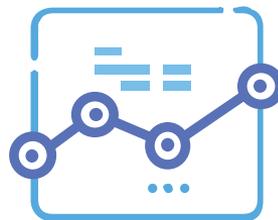
Invoices (created)
Funds (updated with disencumbrance and expenditure)



Wrap-Up

Conclusion

- During this session, we looked at the workflow for Purchasing, Activating and Invoicing for Electronic Resources
 - One-Time Orders
 - Continuous Orders



Questions?



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