Polaris: Acquisitions

Pre-Requisite Videos

* [Leap Navigation and Searching (6 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Leap_Navigation_and_Searching/)
* [Record Sets (5 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Record_Sets/)
* [Standard Reports (5 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Standard_Reports/)
* [On Order Templates (7 min.)](https://exl-edu.com/iii/Polaris/Core_Training/On_Order_Templates/2025/)
* [Funds (5 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Funds/2025/)
* [Suppliers (4 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Suppliers/)
* [Purchase Orders (6 min.)](https://exl-edu.com/iii/Polaris/Core_Training/Purchase_Orders/)
* [Import Profile Configuration for Acquisitions (5 min.)](https://exl-edu.com/iii/Polaris/Core_Training/ImportProfilesAcq/2025/)
* [Fiscal Year Rollover (6 min.)](https://exl-edu.com/iii/Polaris/Core_Training/FiscalYearRollover/)

# Administration Setting

* Fund Naming Preference
* PO Prefix/Number

# Workflow Overview

* Discussion with the library on who does what and their workflow processes.

# Review of set up needed

* FY and Funds
* Suppliers
* On order item templates
* Import Profiles

# Purchase orders

* Creating a PO manually and adding POLIs via:
  + ISBN/Find tool
  + Z39.50/Find tool
  + Typing in a title
* Updating the POLI and adding segments
* Creating a PO using bulk add
* Releasing POs
* Updating POLI statuses

# Manual receiving and invoicing

* Manual receiving and invoicing options
  + Receiving on the PO and copying to an invoice
  + Receiving on the POLI (splitting the POLI) and copying to the invoice
* Work slips
  + Printing
* Creating Invoices
  + Manual Invoice
  + Misc. Invoice
* Paying invoices
  + Header Chargers
  + Distribute Charges
  + Printing Summary
* Undo receipt of a line item
* Undo invoice payment

# Canceling

* Canceling

# Crediting

* Line Item
* Credit Memo

# Claiming

* Find tool
* Reports

# Fiscal Year Rollover (client)

* Review/Questions