Discover how to cancel an order or individual order item in OLIB Acquisitions.

Overview

For whatever reason you may need to cancel an order or individual order item that has been entered onto OLIB. Order items and orders can be cancelled when they are at the following acquisitions Status:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Note</th>
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</thead>
<tbody>
<tr>
<td>PRE-ORDER</td>
<td>Both order items or a complete order may be cancelled when the status is Pre-Order. The order and order items remain in the system, but are not available for check-in or invoicing.</td>
<td></td>
</tr>
<tr>
<td>AUTHORISED</td>
<td>Both order items or a complete order may be cancelled when the status is Authorised.</td>
<td></td>
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<tr>
<td>OUTSTANDING</td>
<td>Both order items or a complete order may be cancelled when the status is Outstanding. Funds are de-committed from the appropriate account instance(s). You may be able to cancel an outstanding order item even if an invoice has been processed for it. This is dependent on how your system is configured. See Default Reference Data Values: Can Cancel invoiced orders? Note: When Items or an order are cancelled when the status is outstanding, recall that this order has been submitted to a supplier for fulfilment. A cancellation request letter should be sent to the supplier.</td>
<td></td>
</tr>
</tbody>
</table>

If the Order is cancelled, all associated Order Items with a status other than Complete are also cancelled.

It is possible to cancel an individual Order Item, an entire Order, or the remaining items due on a partially completed Order Item. If the Order item was for a new title rather than for additional copies of an existing title then the title will have to be deleted from the database as well. If an Order item has been partially delivered — for example, 1 copy of 2 ordered received — then the item should have a status of Cancelled Incomplete.
Procedure for Order Item

1. In Order Items search for the Order item to be cancelled.
2. Switch to Modify mode.
3. Change the Status to **Cancelled** and save the record.

Any committed expenditure will be reduced by the value of the items cancelled and will be added to the Available amount.

Procedure for entire Order

1. In Orders search for the Order to be cancelled.
2. Switch to Modify mode.
3. Change the Status to **Cancelled** and save the record.

All associated Order Items with a status other than Complete are also cancelled. Any committed expenditure will be reduced by the value of the items cancelled and will be added to the Available amount.

Delete the titles of cancelled Order Items

Titles which have been ordered may be deleted if the associated Order Items have the status of Pre-order, Complete or Cancelled. Titles associated with Order Items that are Outstanding cannot be deleted.

The title should be identified and deleted in the normal way.

Delete titles

Once the title has been deleted the Order Item record on the Account Instance is replaced with a 'Deleted title' record. To identify titles that have been deleted go to Order Items and choose the Order Items by Title (Deleted Titles) search.

Cancel an Order Item that is incomplete

An order status of Cancelled Incomplete is available. Outstanding order items should be set to this status if several copies were originally ordered, fewer copies than ordered have been checked in and it is necessary to cancel the remaining copies.

1. In Order Items search for the **Order item** to be cancelled.
2. Switch to Modify mode.
3. Change the Status to **Cancelled Incomplete** and save the record.
4. In Orders search for the order containing the above order item.
5. Change the Status of the order to **Cancelled Incomplete**.
This automatically updates the order, order item(s) and account instance(s).

When an outstanding order item is set to Cancelled Incomplete, the system de-commits the original committed amount for the un-received copies. When an Order Item is set to Cancelled Incomplete, the Order should also be set to Cancelled Incomplete unless there are other outstanding order items associated with the Order.

Note: It is not possible to set an order item’s status to cancelled if copies have been checked in against that order item.

Another way that the Cancelled Incomplete status is applicable to Orders is for multiple-item orders - some order items may already have been fully received, some may have been partially received and some completely outstanding. It is not possible to set the status of an order to just Cancelled if at least one copy of one of its order items has been received. Instead, the Cancelled Incomplete status should be used. If the last outstanding order item on an Order is set to Cancelled Incomplete, the Order should also be set to Cancelled Incomplete.

Cancelled Incomplete orders continue to be listed in the Catalogue Order Items field on the Account Instance page. OLIB also generates a credit commitment adjustment transaction equivalent to the amount de-committed from the accounting period following the Cancelled Incomplete status setting.

**Archive**

OLIB includes an archiving facility which enables you to move completed or cancelled orders (and associated order items) and completed invoices (and associated invoice items) from the live system to an archive database. System level parameters determine when the archiving should be done. The system administrator configures this in Archiving.

**Audit trail**

When an order or order item is cancelled, the information is recorded in the audit trail of the order and order item record. For example, the Audit Trail tab of the Orders layout shows the date and who made the change.