

## SECTION NINE

### Acquisitions

The Horizon acquisitions module is used to create purchase orders, invoice materials, produce on-order records and run reports on materials received. For information on the initial setup and use of the Acquisitions Module, please consult the Horizon Acquisitions Setup Guide and Acquisitions Users' Guide. For further information, contact RPLS.

The Acquisitions module is the only method that should be used to create brief bibliographic records (also called On-Order records) in the SirsiDynix/Horizon database. These brief bibliographic records are created with default items, in order for library patrons to view and request newly ordered titles while searching their Online Public Access Computers (OPAC). On-Order records are created in the Purchase Order process. A purchase order is created to track the title, quantity, and prices of the items being purchased by the lending institution.

Tasks in Acquisitions module involve the creation, tracking, receiving, and invoicing of the items added to each purchase order. The Acquisitions module also provides features that allow users to create reports based on budget types, dates titles are received or ordered, and budget year.

The following basic steps are the preferred order of operations when using the Acquisitions module to order and receive materials;

- Create a new Purchase Order (PO) form (templates can be created and saved for future use)

In order for items created in the PO to appear in the OPAC, one of the Create Item(s) options should be selected in the purchase order header. The preferred choice is the "Create item at line approval" option which allows immediate viewing and requesting of the item. The Create Copy(s) options *are not* to be used at this time.

- Search the Horizon catalog [first] for titles to add the Purchase Order.

Each title creates a line item in the PO. Once the titles are added to the PO, the quantity, cost and budget are added to each line. The PO is then approved which encumbers funds from the selected budgets. Workslips are optional. In the event that a bib record is not currently in the database, there are two options available:

- a. Export the record from the OCLC database
- b. Create a brief/On-order bibliographic record

If there isn't a matching OCLC record available, a brief On-Order record can then be created by adding the title, cost and budget information manually in the "new" form option in the purchase order. The ISBN number should be added if it is available. Brief bibliographic records are created automatically

using the information entered on the purchase order form. Brief bibliographic records are intended to be used as temporary bibs only, until they are replaced by records that have been catalogued more completely. These titles appear in your catalog if *item records* are created at receipt. Original cataloguing in Horizon is prohibited. The following link provides two examples of how brief On-Order records should appear in the catalog. Instructions on “Creating On-order Records” can be found here:

<http://www.rpls.ws/dbs/manual/suppl/acquisitions.pdf>

Notice the 945 field “OCLC DO NOT SET”, alerts the user that the record is not fully catalogued. Replacement bibliographic records are exported from the OCLC database, after which, the brief record should always be overlaid or merged with the matching imported bib. For further instruction, see “Merging bibliographic records” in Section 5 of this manual. Note: the majority of the brief on-order records created will not be overlaid when importing an OCLC record therefore in the majority of cases a merge will be necessary.

- Invoice new items as they arrive.

As these items are invoiced their status is changed from the “on-order” status. Items that haven’t been received/cancelled and items that have been returned to the vender with no plans for reorder should be deleted from the database with the bibliographic information. Horizon will not allow deletion of bibliographic records that have been altered or with other items attached. Libraries using the Acquisitions module should periodically check older purchase orders to be sure they are in the “completed” status. Closing out outstanding purchase orders and rolling over fiscal year budgets are essential to keeping the Horizon database free of orphan bibs/items.