

CREATING ON-ORDER RECORDS

1. Select the Acquisitions/Purchase Order folder in the navigational bar
2. Choose New PO (other PO searching options include Find PO by Header, find PO by Line, or PO template).
3. Choose New PO
4. Enter the vendor code or vendor name in the dialog box and click OK
5. Enter a preferred PO number in the PO field (SirsiDynix will add a default PO number if left blank)
(If vendor table has been set up correctly Horizon will add the Location field, Billing address field, and the Shipping address field.)
6. Enter a description in the Description field (if applicable)
7. Enter a note in the Note field if needed
8. The Spent Event should have Receipt and Statement Approval selected as default (this used for the majority of items)
9. The Copy/Item creation should have Create Item at PO Line Approval selected.
10. Libraries that wish to barcode when receiving should choose Barcode @ Receipt
11. The Collection and Item Type fields should have "acq" as their codes
12. Click Save and Close

Click the "NEW" button on the purchase order to create a new line item.

Fill in the required fields in the purchase order:

1. Title: Enter the item's title, including the subtitle if possible.
If the item is audiovisual material please include the format immediately following the title.

Example: The world is now; social networking for tomorrow's educator (DVD)

2. Author: Include the author's full name if possible, [last name, first name]
3. ISBN/ISSN: Enter the ISBN or ISSN (for serials) if they are available.
4. Quantity: Enter the number of copies ordered.
5. Location: Enter the location the copies will be ordered for or click on the Codes button and choose from the list.
6. Budget: Enter a budget code or click Codes to choose the budget from the list (if the budget required is not available contact RPLS)
7. Collection: Enter acq.
8. Item Type: Enter acq.
9. **Horizon will not create the On-Order record until the line items are approved. To approve the line item, click PO line in the menu bar and choose the "Approve" option. The new bib will be created by Horizon. To check for the new record bib without leaving the purchase order folder, click PO Line in the Menu bar and select Display Workslip.**

When a new bib record is created using the acquisitions module, the only the most basic fields, tags and subfields display in the Horizon brief On-Order record. When the record is viewed in

the MARC Editor, additional fields, tags and subfields can be added, providing the user is Copy Cataloger certified. All on-order records created in the acquisitions module contain the 945 \$b OCLC DO NOT SET.

An example of a On-Order bib record created from a purchase order:

000 00000nam 22000255

020 \$a 9780060853471

049 \$b decpdl

100 1 \$a Shu, Tim.

245 1 0 \$a The world is now; social networking for tomorrow's educator (DVD)

945 \$ b OCLC DO NOT SET.

There are three fields added by the user that the system generates for a brief record, the author field, the title field and the ISBN field. Note: The default setting for On-order records for the 245 field second indicator is 0 (zero), therefore if the system will search for the first character listed in the title. This indicator represents the nonfiling characters and with a 0 (zero) it will not skip initial articles (i.e. "The", "A", "An", " Los", "El", etc.) at the beginning of the title. Any additional fields are system generated and put into the record. Please do not delete system-generated fields.