

## Acquisitions: Create Dummy PO

Created By: Shelley Schultz  
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Created by Shelley Schultz & Jerrie Bourgo @ Kirkwood Community College, September 5, 2001

### **CREATE DUMMY PO**

#### **Version 2000.1.2**

- Open **Acquisitions** and **Cataloging**
  - Login and password
  - Select Acquisitions
  
- In **Acquisitions**
  - Set Defaults (Puzzle Piece)
    - Purchase Order Tab – Blank
    - Line Item Tab – Blank
    - Line Item Copies/Funds Tab – Blank
    - OK
  - Orders
    - New Purchase Order
      - Number: PO # if different from default (for practice add your initials before the number)
      - Type: Continuation
      - Site: Acquisitions Desk
      - Code:
        - SPECIFIC TO EACH SITE
        - Click on check mark
      - Ship to: Acquisitions Desk (optional)
      - Bill to: Acquisitions Desk (optional)
      - Currency Code: USD
      - Save

- Turn Quick Line Item ON
  - Add Line (Bib Search) for title in database
  - Locate title
  - Highlight item
  - MARC
    - Click on blinking **Cataloging** icon
    - Verify correct record
    - Get Holdings
      - Check 852 field
  - Save to Database
    - If changes made in Marc or holdings records

## Return to **Acquisitions**

- Details
  - Intended location (“Live At” location)
    - This creates MFHD
    - LOCATION IS SPECIFIC TO SITE
  - Number of copies (always 1)
  - Link to Holdings
    - Click ellipses once
    - Highlight appropriate holding
    - Click on “Link”
  - Ship to: make appropriate choice
  - Ledger
  - Commit to Fund
  - Line Item Type: Subscription
  - Check “Open Line Item Detail window after saving”
  - Save
- Type Tab on Line Item screen
  - Line Item Type: Subscription
  - Start Piece Identification
    - Fill in enumeration and chronology for first issue you expect to receive
      - V.x, No.x
      - From VTLS sheet
  - Start Date

- Date of first issue expected
  - Renewal Date
  - Subscription length
    - As appropriate
  - Vendor title number if Ebsco (3digits-3digits-3digits)
  - Vendor reference number
    - “(SNA)” for Ebsco
    - Title number
    - Renewal Date
  - Save
- Subscription Pattern button
  - Subscription Maintenance screen appears
    - New
      - Title appears in Component Details
      - Category
        - Basic
        - Index
        - Supplement
      - Save
  - Subscription Maintenance (cont.)
    - Predictive Component Pattern
      - Make appropriate choice.)
      - Start prediction
        - Fill in as appropriate for first issue expected
        - Enumeration
        - Chronology
        - Convert Roman numerals to Arabic
        - Fill in 1<sup>st</sup> Issue Expected Date
        - Date of Month Expected
          - Must match 1<sup>st</sup> Issue Expected Date
        - OK (If provided)
        - If another screen pops up
          - Select appropriate issue
          - OK
    - Save changes made in subscription maintenance in “Component Details” Tab

- Click on the “Purchase Order” screen to approve
  - Approve PO
  - Yes
  - Yes
- Clear Workspace
- Close PO
  - If asked to save all changes respond yes

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