

Process to Create a Purchase Request

A Purchase Request is a request for the purchase of material for the Library. Purchase Requests are also called selection or desiderata (wish) lists. Before creating the request, you should search the catalog to make sure you do not already own the title. If the request is for an additional copy of a title you already own, you can create the request by copying the title information from staff searching. You create and update Purchase Requests from the Navigation bar under Acquisitions and Purchase Requests.

You can assign statuses to your Purchase Requests. Statuses help you track where a Purchase Request is in the selection process. There are five (5) possible statuses: 'Requested', 'Selected', 'Rejected', 'Ordered' and 'Received'. Horizon automatically assigns 'Requested' (new request), 'Ordered' (added to purchase order), and 'Received' (items received). 'Selected' and 'Rejected' are manually assigned by you.

If you want to create a Purchase Request for an additional copy of a title you already own, you can create the request by copying the title information from staff searching. When you copy a title from staff searching, Horizon creates a Purchase Request for the title and copies the bib information to the request. Copying a title from staff searching to a Purchase Request links the title bib record to the new request.

Note: Changing the bib information on a request that you copied from staff searching does not change the information on the bib record.

The following Purchase Request categories have been created for your use when creating a Purchase Request:

CGC (Chandler-Gilbert Community College)
EMC (Estrella Mountain Community College)
GCC (Glendale Community College)
GWC (GateWay Community College)
LTS (Library Technical Services, District)
MCC (Mesa Community College)
MRM (Mesa Red Mountain Community College)
PC (Phoenix College)
PVC (Paradise Valley Community College)
RSC (Rio Salado Community College)
SCC (Scottsdale Community College)
SMC (South Mountain Community College)

To Create a Purchase Request for Title(s) in Staff Searching

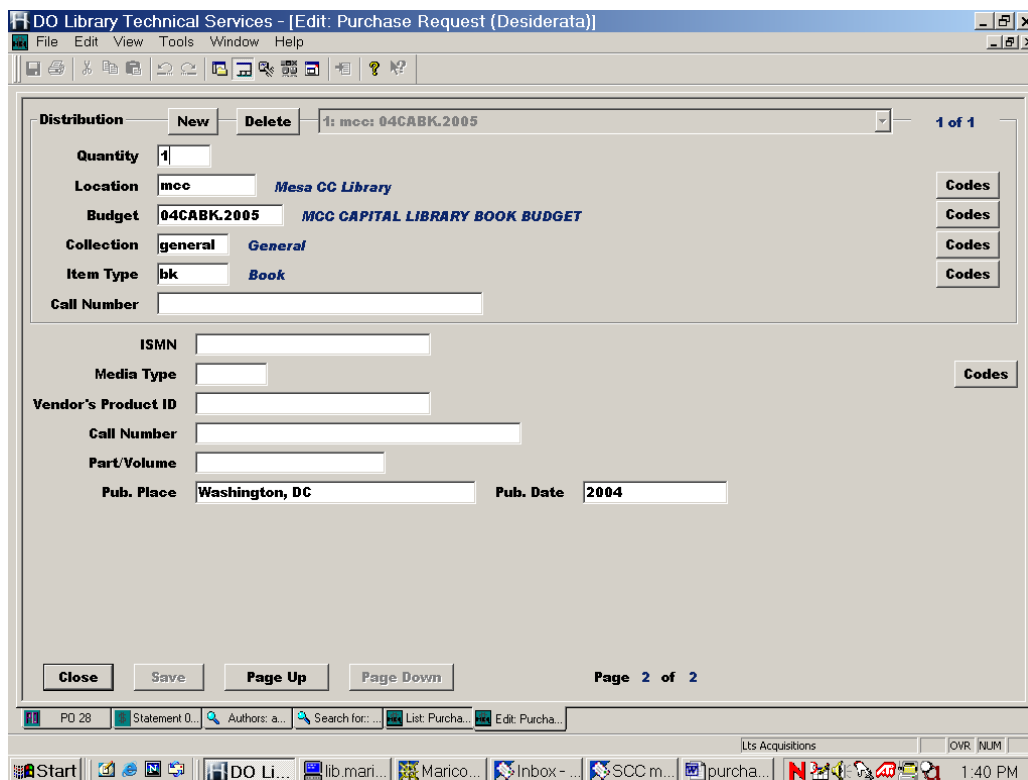
1. Search (F2) for the title(s) you want to request.
2. Highlight the title(s) that you want and press F10 to send to the Purchase Request.
NOTE: To remove a title select it and click File/Delete Record on the menu bar.
3. Choose the title in the Purchase Request list window to edit, assign a category, etc. and click **Edit**.
4. Complete the fields in the window.

The screenshot shows the 'DO Library Technical Services' application window titled '[Edit: Purchase Request (Desiderata)]'. The interface includes a menu bar (File, Edit, View, Tools, Window, Help) and a toolbar with various icons. The main form contains the following fields and options:

- Created:** 08/19/2004
- Source:** Manual Entry
- Bib No.:** pr# 175
- Title:** Laboratory animals in research and teaching: ethics, care, and methods
- Author:** Atkins, Chana K.
- ISBN:** 1591471451
- ISSN:** (empty)
- Format:** Trade Cloth
- Categories:** New, Delete, Mesa Community College (dropdown), 1 of 1
- Category:** MCC, Mesa Community College (dropdown), Codes button
- Edition:** (empty), Volume: (empty)
- Publisher:** American Psychological Association
- Status:** Requested (selected), Selected, Rejected, Ordered, Received
- Req. Note:** OW:JM/sp
- Sel. Note:** (empty)
- Ord. Note:** (empty)
- Selection:** MCC, Mesa Community College (dropdown), Codes button
- Unit Price:** 59.95

At the bottom of the form are buttons for Close, Save, Page Up, and Page Down. The status bar indicates 'Page 1 of 2'. The Windows taskbar at the bottom shows the Start button, several open applications (including 'lib.marico...', 'Maricopa...', 'Inbox - N...', 'SCC mes...'), and the system clock showing 1:44 PM on 8/19/2004.

- **Title:** Enter title and subtitle.
- **Author:** Enter Last name, First name, MI.
- **ISBN or ISSN:** Enter isbn or issn if known.
- **Format:** i.e., Cloth, trade paper, VHS, DVD, etc.
- **Category:** Use the Codes button, choose your library's category.
- **Publisher:** Enter full publisher name, no abbreviations.
- **Req. Note:** Enter notes: rush notes, instructor notes, requestor name or initials, notes to ACQ, cataloging or processing. Add initials of person creating purchase request.
- **Selection:** Using the Codes button, choose your library's selection name-same as category name.
- **Unit Price:** Enter exact price.



- **Quantity:** Indicate the amount of copies being requested.
- **Location:** Using the Codes button, choose your library's location code.
- **Budget:** Using the Codes button, choose your library's budget code.
- **Collection:** Using the Codes button, choose the appropriate collection.
- **Item Type:** Using the Codes button, choose the appropriate item type.
- **Vendor's Product ID:** Enter catalog #, Item #, etc.
- **Pub. Place:** City/State.
- **Pub. Date:** Publication or copyright date.

5. Click **Save**.

To create a Purchase Request for Title(s) MCCCCD Does Not Own

1. From the Navigation bar select Acquisitions, Purchase Request, and double-click New PR.
2. Complete the fields in the window.
You must complete at least the following fields: Title, Author, ISBN/ISSN, category, unit price, and distribution information.
3. Click **Save**.

To Search Purchase Requests by Title Keyword

1. From the Navigation bar select Acquisitions, Purchase Request, and double-click Find PR.
2. Select PR Title Keyword and enter the word or words you want to search on.
3. Click **Search**.
4. Review and update the requests as necessary.

To Search Purchase Requests by Category

1. From the Navigation bar select Acquisitions, Purchase Request, and double-click Find PR.
2. Select PR Category.
3. Click the **Categories** button to display the categories you can choose from.
4. Highlight the category you want and click **OK**.
5. Click the **Search** button.
6. Review and update the requests as necessary.

To Search Purchase Requests by Status

1. From the Navigation bar select Acquisitions, Purchase Request, and double-click Find PR.
2. Select PR Status.
3. Click the **Statuses** button to display the statuses you can choose from.
4. Highlight the status you want and click **OK**.
5. Click the **Search** button.
6. Review and update the requests as necessary.

To Delete a Purchase Request

NOTE: You **cannot** delete requests that have been copied to a Purchase Order.
You **can** delete other locations Purchase Requests. Please be cautious.

1. From the Navigation bar select Acquisitions, Purchase Request, and double-click Find PR.
2. Highlight an index and enter a search term based on the request you want to delete.
3. Click **Search**.
4. Highlight the request(s) you want to delete.
5. Click File/Delete Record on the menu bar.
6. At the message window, click **OK**.