Acquisitions Purchase Order
Practice Exercises

To perform these purchase order exercises users must have the either purchaser or administration supplemental permissions.

Creating New Purchase Orders

Exercise 1 – Adding Charges

1. Create a new purchase order. (*Acquisitions -> Create Purchase Order*)

2. Name your purchase order **Purchase Order 1** followed by your initials.

3. Add the following charges:

4. Select a fund for each of your charges.

5. Save your charges.

6. Activate your order.

Exercise 2 – Brief Records

1. Create a new purchase order. (*Acquisitions -> Create Purchase Order*)

2. Name your purchase order **Purchase Order 2** followed by your initials.

3. Using the *Add Brief Record* button, create three brief records for this purchase order.

4. Add copies, notes, alerts, estimated prices and funds to each line item.

5. Activate your order.

Creating Purchase Orders from Selection Lists

Exercise 3 – Converting a Selection List

1. Create a Selection List (http://docs.sitka.bclibraries.ca/Acq/current/html/acq-workflow-one.html)

2. Add 6 Items

3. Use the tick boxes to select 4 of the line items.

4. From the main *Actions* drop down menu select *Create Purchase Order.*

5. Fill in the required information and click *Submit*. Make sure you choose **Selected Lineitems.**

Updated January 2014

6. Repeat these steps to create a purchase order using the remaining 2 line items on the selection list.

Creating Purchase Orders from View/Place Orders

Exercise 4 – Adding Items from the Catalogue

1. Press F3 or Click Search → Search the Catalogue

2. Enter Search Terms to find desired Item

3. From Search Results, click on the Hyperlinked title on desired Item

4. Click on *Actions for this Record* → *View/Place Order*

5. Click on *Add to Purchase Order*

6. Enter the PO Name (Use the purchase order you created in Exercise 2 "**Purchase Order 2 + your Initials**")

7. Click *Save*

Exercise 5 – Additional Purchase Order Features

1. Open the selection list you created in Exercise 3**.**

2. Use the hyperlink purchase order number on the line item to access one of your newly created purchase orders.
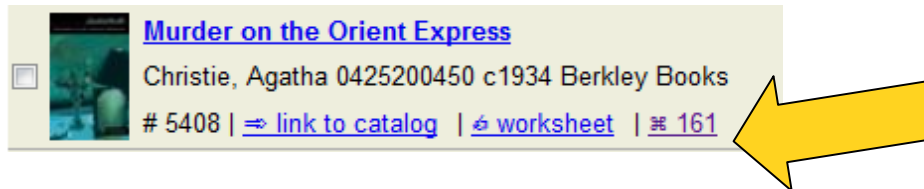
3. Rename your purchase order **Purchase Order 3** followed by your initials.

4. Add a vendor-visible note to your purchase order.

5. Open and rename the second purchase order you created. Name this one **Purchase Order 4** followed by your initials.

Exercise 6 – Editing the Order Identifier

1. Click on *Acquisitions* → *Purchase Orders*

2. Search for **Purchase Order 4 your initials**

3. Change the "*Order Identifier*" for your first line Item

4. Select *ISBN* from the drop down List

5. Delete the Current ISBN #

6. Enter **9780356871251** (This is a fake ISBN)

7. Click *Reload*

Exercise 7 – Activating Purchase Orders

1. Open **Purchase Order 3 your initials**.

2. If you have not previously assigned funds to your line items your purchase order will not be activatable. Assign funds to each of your line items.

3. Ensure all line items on the purchase order have at least one copy and an estimated price.

4. Use the hyperlink to activate your purchase order.

5. Repeat this procedure for **Purchase Order 4 XX.**

Exercise 8 – Printing a Purchase Order

1. Open one of the purchase orders you created.

2. From the main *Actions* drop down menu select **Print Purchase Order.**

3. Print your purchase order.

Detailed instructions for performing all the tasks above can be found at:

http://docs.sitka.bclibraries.ca/Acq/current/html/index.html