GEORGIA PERIMETER COLLEGE ACQUISITIONS DEPARTMENT
CREATING A PURCHASE ORDER

1. Choose **GIL QuickConnect**

2. Choose Database:

   - **GPC Production DB**, if ordering for Clarkston, Decatur, Dunwoody, or Newton
   - **Gwinnett**, if ordering for the Gwinnett Center

3. Choose **Acquisitions** module

4. Type your Operator ID and Password (lowercase)

5. Session Defaults should be created before you begin creating a Purchase Order and Invoice.

   Setting Session Defaults:

   If you are creating purchase orders for a variety of vendors and various locations then Session Defaults is not necessary. You must go in session defaults and click on "Clear All" before you began creating a purchase order. Setting Session Defaults will cause certain information to appear automatically on every purchase order. Before creating multiple purchase order for same vendor and same campus (example: B & T – Clarkston), you will want to create Session Defaults. See procedures for setting session defaults listed below.

   Select Defaults from the Tools menu or you can click on the Defaults button (the red white and blue puzzle). The Defaults window will display.

   Click on the tabs at the top of the window: Purchase Order, Line Item, Line Item Copies/Funds, Invoice, Vendor, Fund and Ledger. When you click on a tab, the session defaults window re-draws to display the appropriate information.

   A. Purchase Order Tab:
   Click the Purchase Order tab. Default values specified on the Purchase Order tab will apply to several of the fields on the Header and Footer tabs of all new purchase orders created during your current Acquisitions session.

   1. Select a default order site location from the drop-down menu in the Order Site field (ACQUISITIONS). This will apply to the site field on the Header tab of the new purchase order.

   2. Select a default shipping location for your purchase order items from the drop-down menu in the Ship To field (ACQUISITIONS). This will apply to the Ship to field on the Header tab of a new purchase order.

3. Select a default billing location from the drop-down menu in the Bill To field (ACQUISITIONS). This will apply to the Bill To field on the Header tab of a new purchase order.

4. In the Vendor Code field, type the code of the vendor that you want to use as your default for buying items. If you don't know the vendor code, click the search button (magnifying glass) beside the Vendor Code field to conduct a search for the vendor. See Rose if any other vendor codes are needed besides the ones listed below.

   - B&T = Baker and Taylor
   - EP = Emery Pratt

5. When the Vendor Code is typed in any Account's associated with the Vendor will display in the Account field. After vendor code has been specified in the Vendor Code field, select a vendor account (Choose from the list of campuses) from the drop-down menu in the Account field.

6. Any values that have been specified on the vendor record, the appropriate values will automatically display in the Currency, Order Type, Cancel After and Claim Interval fields.

B. Line Item Tab: Not used at this time.

C. Line Item Copies/Funds Tab

Click the Line Item Copies/Funds tab. The Line Item Copies/Funds tab allows you to establish default copy and fund information for one or more intended locations. This default information is applied to each new line item.

1. From the drop down menu in the Intended Location field, select an intended location to assign the default. This will always be the Campus and the "on order " status (ex. Clarkston on order).

2. In the # of Copies field, type in the number "1". This value will apply to the number of copies of a title to be ordered.

3. From the drop-down menu in the Ship To field, select a default location where you want the line item copies for the intended location shipped. You should always select "ACQUISITIONS" for the Ship to location.

4. From the drop-down menu in the Commit to Fund field select the fund to be used for the line item copies for the intended location. (Once you fill in the intended location field as outline in #1 the correct Fund should automatically fill in). Please make sure that the correct campus location is showing.

D. Invoice Tab:

Click the Invoice tab. Default values specified on the Invoice tab will apply to four of the fields on the header tab of a new invoice created.

1. Select a default billing location from the drop-down menu in the Bill To field. Acquisitions should always be selected.

2. In the Vendor Code field type the code of the vendor that you are ordering from.

   - B&T = Baker & Taylor
   - EP = Emery-Pratt

3. After the vendor code has been specified in the Vendor Code field, select a vendor account form the drop-down menu in the Account field. The account will be the Campus name of the Campus you are invoicing.

4. Select a default currency code to use on the new invoice from the drop-down menu in the Currency field. (This field will automatically fill in once you fill in the Account field)

E. Vendor Tab:

Click on the Vendor tab.

1. The only field that you will need to fill in on this tab is the Type Field. The choice will be Monographs (Books), Video, and Serials. Choose the type that you will be using. The other fields are not necessary to fill in.

F. Fund Tab – Not used at this time.

G. Ledger Tab- Not used at this time.

Click OK

Creating a New Purchase Order:

1. Click the Orders tab in the Acquisitions window list bar. The list bar changes to display the two P.O activity options: **New Purchase Order** and **Search Orders**.

2. There are a number of ways to create a new purchase order:

   a) Click the New Purchase Order button in the List Bar.
   b) Select Orders from the View menu and then select New Order from the menu.
   c) Select New from the File menu and then select Purchase Order from the menu.

New Purchase Order dialog box displays:

The Purchase Order is made of three parts:

Heading Information
Line Item Information
Other Order Information

- **Heading Information:**

  1. P. O. Number – A number will automatically be provided by the system however you must change this p. o. number to the department assigned p. o. number (example 700BTC-1).

  2. If Session Defaults were set – all other information will be automatically filled in – Choose Save (at bottom of screen).

  3. If Session Defaults were not set – all boxes with red labels must be filled in before you can proceed with the order:

     Vendor Code: choose from provided list of vendors - if new vendor must be created – give to Dianne or Rose

  4. Account: Choose account name (campus) from drop down arrow – Choose Save

- **Line Item Information:**

  There are three ways to add line item information: Bib Import, Use an Existing Bib Record or create a New Bib Record.

  Bib Import: (Used when no bibliographic data exists in our database)

  1. Click on Bib Import to import button at the bottom of the screen to import a record from outside GPC (example: Title Source II, OCLC)

  2. Under Drives – Click on the A Drive.

3. Double click on the file name (cart name) you wish to import.

4. Click and Highlight all titles listed in the file. (Total record count must equal number of items listed on p.o.)

5. Click import – NOTE: If you receive the following message: "This record was not added. A duplicate record exists. Link line item to the duplicate?" Always click NO (Please give slip to Dianne or Rose)

6. Once the hourglass becomes an arrow, click Close. The records should appear as line items on the purchase order indicating the import was successful.

Using an Existing Record in the Database: (Used when we already own bibliographic data)

1. If we already own the Bib record for a title, we are creating a purchase order for the slips will have numbers written in red at the top right hand corner of the slip.

   - Select Add from the Line Item Menu then select "by Bib ID"
   - Type the red numbers from the slip in the dialog box, and then click OK.
   - The title should appear as a line item (Please check the title to make sure it has been added correctly.)

2. Another way of adding an existing record is to click on the Add Line Bib Search button.

   - Choose Keyword, click on the radio button next to "free text." Type search in the "search for" box (example: ISBN#)
   - Highlight on desired record to add line to purchase order, double click, this should bring line item onto purchase order

Creating a New Brief Bibliographic Record: (Used when the first two are not Available)

1. From menu bar choose LINE ITEM > ADD > NEW (Choose Book Template from dropdown)

   - Fill in Title (In all Caps), Author, ISBN and any other known fields
   - Click OK – this should bring the line item onto your purchase order

2. Another way to add a brief bib record is to click on the "Add Line Template" button at the bottom of the purchase order and fill in the needed information.

Line Item Information: (continued)

1. Check to make sure "Quick Line Item" is on at the top of the Purchase order.
2. After adding line items highlight the line item then click on the details button at the bottom of the Purchase order. If the Quick Line Item button is on a screen will appear for you to enter the price.

    - If notes are required, place a check in the "open line item detail window after saving" box
    - Click Save
    - Choose Notes and enter under Notes: (ex: notify Dr. Jones)

3. If you did not turn the "Quick Line Item" on you will get a dialog box with 13 different tabs.

    - Click on the price tab and enter price in the box under List price
    - Click save.
    - If there are notes click on the notes tab and add the notes.

4. If session defaults have been set then that is all the information you will need to enter for each line item.

Other Ordering Information:

1. Once you have completed all line items, make sure the total PO amount is correct. All fields that are necessary should already be completed.

    - Click on save to save the P.O.
    - Give to Dianne or Rose to Approve.