

3.1 SELECTING THE MATERIAL TO BE ORDERED

Various resources are available to help a library decide which material to purchase: catalogues, publishers' programmes, book fairs, etc. The purchase of library material can also be suggested by members in the form of *requests*. Requests can only be made by library members whose details are recorded in the local database of members in the COBISS3/Loan or COBISS2/Loan module.

A purchase request includes bibliographic data on the material and the data about the supplier, copies, priority, price and requestor, all a part of the *order item*.

If you wish to enter a purchase request, first specify the material and then enter the order item for this material. The way of specifying the material depends on whether the record for this material exists in the local database or not. If it does not, download it from the shared database (see chapter 2.1.1), or enter bibliographic data about the material (see chapter 2.2) yourself.

The requests are then processed, i.e. approved or rejected, or they receive the status of a *desideratum*.

After that you prepare an *order* for the supplier.

3.1.1 Entering a request

When entering a request to purchase material, you should specify the supplier, copies, priority, funds, price and requestor.

Enter the request data in the **Order item** editor.

Procedure

1. In the **Material** class, find and select the material.
2. Select the **Object / Edit** method.

The **Material** editor will open.

3. Click the **New object** button.

The **Order item** editor will open.

4. Enter the data (see chapter 3.2.1.2, from step 4 onwards).

The number of the order item remains 0 until it is placed on the order.

Status after entering a request

Order item

- *entered*

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- *entered*

What to do next You process the request, i.e. you approve or reject it, or define the status *desideratum*.

3.1.2 Processing a request

Considering the needs and funds available you can mark the request as:

- approved – the request represents the basis for ordering
- desideratum – this request may be realised at a later point
- rejected

3.1.2.1 Approving a request

You can approve either one request or several requests simultaneously.

Precondition You can approve a request entered, a desideratum or a request rejected.

Procedure

1. In the **Order item** class, find and select the order item.
2. Select the **Object / Approve request** method.

Status after approving a request

Order item

- *request approved*

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- *request approved*

Options To approve several requests simultaneously, highlight the **Order item** class and select the **Class / Approve requests** method. A window with a list of requests entered will open. Select the requests that you wish to approve.

What to do next On the basis of an approved request, you can prepare an order for the supplier.

3.1.2.2 Rejecting a request and other changes of its status

You can mark a request as rejected or as desideratum (or as approved or entered) by changing its status.

Procedure

1. In the **Order item** class, find and select the order item.
2. Select the **Object / Change request status** method.
3. A window will open, where you can change the request status.
4. Select the new request status.

**Status after changing
a request status**

Order item

- *one of the following statuses: entered, request approved, desideratum, request rejected*

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- *one of the following statuses: entered, request approved, desideratum, request rejected*

3.1.3 Deleting a request

A request (i.e. order item) can be deleted from the database.

Precondition

The request status must be *entered*.

Procedure

1. In the **Material** class, find and select the material, where you wish to delete an order item.
2. Select the **Object / Edit** method.
The **Material** editor will open.
3. Mark the order item and click the **Delete** button.
The item will be deleted from the database.
4. Save the data.