

Acquisitions

Enhancement#: 129 (11/18/2003)
Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:

Proposal: "Default 'pull down menu'. Develop a new pull down menu entitled 'defaults'. This should, at least, include selection for item record and PO line records. The item record window should include itype, location, and collection. The PO line record window should include vendor, location, budget (order type), stat class (language, requested by, format, and physical description)."

Enhancement#: 130 (11/18/2003)
Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 5.1 Priority: 3 Weight:

Proposal: "Functional Acquisitions/Serials links - Serial order, renewal & claiming. 1. Create a button on the PO to go directly to the serial copy record, and a button on the serial copy record to go to the PO. 2. Create a button on the PO to go directly to the serial checkin record, and a button on the serial checkin record to go to the PO. 3. PO, vendor#, and etc. should appear on serial claims. \$. Add a subscription period field to the PO, with start and end dates. When the subscription period is entered, the information will be transferred to the serial copy record. 5. Add a report to show expired subscriptions, based on the subscription period. 6 Add a renewal feature to the PO, allowing price update and renewal for the next year."

Enhancement#: 131 (11/18/2003)
Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:

Proposal: "Duplicate title detection by series title. At the point where a record is sent to acquisitions to be added to a PO, or added via the Purchase Order input screen, the system should compare all 440 and 8XX tags on the record to a list of established standing orders for monographic series. When it encounters a matching series title it should respond with appropriate options, such as: 1. add to new PO, 2. add to standing order PO, 3. Cancel"

Enhancement#: 132 (11/18/2003)
Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:

Proposal: "New fields needed in vendor records. Add the following fields to the vendor record: on page 1: standard library discount. In addresses blink: email address and fax number. In contracts blink: order type and when order type is a standing order for a monographic series, there should be a field for the series title."

Enhancement#: 133 (11/18/2003)
Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:

Proposal: "Default account codes. Considerations: The development and application of account codes is probably more institutionally unique than any other element of the acquisitions system. These codes may be developed based on order type (subscription, firm, etc), format

(monograph, serial, etc), physical description (paper, microfilm, CD etc), subject (call number range), and further impacted by who requests an item. Even though this area is extremely complex we believe that some attempt should be made to develop a feature which would apply at least some account codes automatically so that acquisitions personnel do not have to rely exclusively on their memory or a manual list. It is extremely important, from an administrative perspective, that these accounts be applied accurately. In our case items are paid for from accounts that are based on specific subject areas (defined by a call number range) which corresponds to departments within the seminary. For example everything from call number B to BJ might be charge to the Philosophy dept. If however a member of the Philosophy dept requests a book on missions, the book is charged to the philosophy dept. Based on our own needs, which I believe are similar to other academic libraries, the following two resolutions are submitted as a first step toward this larger issue. 1. Develop a call# range table, containing records which include a field for default account codes. At the point where a record is sent to acquisitions to be added to a PO, the system should compare the appropriate call number tags on the bib record (based on the location profile) to the call number list. When it identifies the correct call number range it should respond by supplying the default account code to the open PO line record. 2. When a 'requested by' field is entered in the PO line record, the system should compare the entry with a list of established 'requesters.' When it identifies the correct requester it should respond by sup"

Enhancement#: 134 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:

Proposal: "Default BISAC subdirectory. Just as importing a record into the cataloging module from OCLC involves the use of client hard drive space, so does the use of BISAC order creation, as the BISAC file is essentially held in queue awaiting upload to a vendor. As the cataloging module knows where to look for the export.dat file in the previous example, so should the acquisitions module know to look for a default BISAC subdirectory on the client workstation, as assigned by the individual."

Enhancement#: 135 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 0 Weight: Large

Proposal: "Data import from CD-ROM. Develop a manner in which data from a CD-ROM database may be imported into the Acquisitions module. This may be done in a similar manner to an OCLC export, where a file is written to the hard drive from the source database, and read by the Acquisitions module, with the correct fields (specific acquisition data) mapped to the correct location in Acquisitions."

Enhancement#: 136 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 0 Weight: Large

Proposal: "Connect Books in Print on CD-ROM directly to the acquisitions module, to allow searching and importing of records for orders."

Enhancement#: 138 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 5.2 Priority: 0 Weight:

Proposal: "Tracking of encumbrances and actual spending. 1. develop a mechanism which enables the acquisitions operator to have immediate feedback on encumbrances

status without having to get to this information via the Table Editor. For example, a pull-down menu item that opens a dialog box in which the operator could type the account (or pick the codes button and select the appropriate account) and see the status. 2. Develop a parameter in the account table that would be preset to contain the estimated over-encumbrance for that fiscal unit. 3. Develop a warning box that appears on the screen when the aforementioned percentage is reached. The box should indicate the coverage and contain three buttons; one marked 'continue' which allow the operation in progress to continue, but the alarm would sound on the subsequent over-encumbrance, the second marked 'discontinue' warning which would suppress the alarm in the future (until reset by the addition of funds to the particular account) and the third marked 'quit' to cancel the operation."

Enhancement#: 139 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:

Proposal: "Helps for occasional users. Develop field descriptions like those found in PAC and CAT that appear whenever the input cursor is placed in the field. These descriptions should appear in a status line at the bottom of the window, which also allows space on the screen for format examples."

Enhancement#: 140 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: "Documentation. Develop a comprehensive, context-sensitive online documentation system, possibly even multi-media, that integrates acquisitions theory with Horizon procedures. 2. Expand the present manuals to provide more comprehensive explanations on why features have been included and how these features fit into the overall work-flow."

Enhancement#: 141 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 0 Weight: Large

Proposal: "Price disparity warning. When a price is entered on the statement line item which exceeds a preset percentage, a dialogue box should appear that offers three buttons. 1. a button marked 'continue' that allows the acquisitions technician to give authorization to continue with the statement procedure. 2. a button marked 'saved for review' that causes a flag to be placed on the statement so that the acquisitions librarian may view the problem at his or her convenience and either provide authorization or rejection at that point, 3. A button marked 'cancel' would end the statement operation at that point, saving the statement up to the problem. The difference in cost that triggers this dialogue box should be based on a percentage of the estimated (encumbered) cost of the item, established as a parameter preset by the acquisitions librarian at the time the budget is set."

Enhancement#: 142 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:

Proposal: "Customizable POs and Vouchers. 1. Develop a feature that would allow individual institutions to format POs and Vouchers as they see fit, similar to the label format. (allow definition of fields appearing on printed POs, such as editions, pub, date of pub, etc). 2. Develop the means for writing completed POs and Vouchers to disk, either in ACSII format in the formats of the more popular word processors (e.g. Word for windows, Wordperfect for windows etc)."

Enhancement#: 144 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 0 Weight: Medium
Proposal: "Voucher-Correspondence to Statements. So that vouchers can be made to correspond to statements more effectively, add a line-item by line-item schedule to the voucher that corresponds to the associated statement. Voucher should include line numbers for reference to statement line. Voucher should include line numbers for reference to statement line numbers. For example, statement XXX shows line 1 as: 1. The once and future king/T.S. White ISBN XXXXXX 9.95 (retail)7.95(discounted). The voucher should show: 1. The once and fuure king /T.S. White. 7.95"

Enhancement#: 145 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: "Include ISBN/ISSN on 'ACQ-PO Line Receive. When receiving an item, the system should automatically display the ISBN/ISSN so the librarian can easily check whether the correct item was ordered. Right now the view for 'ACQ-PO line receive' includes the quantity and internal notes fields but not ISBN/ISSN. The Horizon system admin manual indicates this ia view that we should not change."

Enhancement#: 146 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: "Supply Invoiced Price in 'Detail Status Invoiced Amount'. In Staff PAC: The Detail Status Invoiced Amount currently is not the invoiced price within Acquisitions, rather it's price entered when the order was placed. This price should reflect the price paid NOT the price."

Enhancement#: 147 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: "Initial Articles in ACQ. When a title is ordered via Acquisitons that has an initial article (ex. A Book of Nouns) the title does not get indexed properly. From all indications I have, the title is just lost and not searchable via a title search on PAC. It can be found through an author or ISBN search, assuming this info was entered in Acquisitions."

Enhancement#: 148 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:
Proposal: "PO header Price no longer updated as items are added to the PO. in 3.1 as a line item record was added (unit price), the PRICE in PO header increased to show the current total value of the PO. Now that the header PRICE is no longer updated unless we save, exit and reopen the PO, we must determine order items ahead of data entry (use calculator to add up unit prices). We want this feature back !"

Enhancement#: 149 (11/18/2003)
Category: Acquisitions
Subcategory:

Software Version/Release:**Subject:** Module: ACQ Status: Release: 0 Priority: 3 Weight:**Proposal:** "Local control of PO line item elements and order on printed PO. In 3.1 all printed POs were alphabetized by title, that was acceptable. In 3.2 the PPO line items are listed in the order in which they are entered in the system. We would really like to be able to determine the order on the printed PO and what will be, but as a minimum, the PO needs to be in title order."**Enhancement#:** 150 (11/18/2003)**Category:** Acquisitions**Subcategory:****Software Version/Release:****Subject:** Module: ACQ Status: Release: 0 Priority: 3 Weight:**Proposal:** "Listing of canceled titles and reasons for cancellation. Many times items are canceled 'temporarily'. A listing of these is needed for the purpose of reordering. Also, it would be nice to be able to track the reason for the cancellation and retrieve by that reason (for example, future publication date if delay in publication was the reason for the cancellation)."**Enhancement#:** 151 (11/18/2003)**Category:** Acquisitions**Subcategory:****Software Version/Release:****Subject:** Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned**Proposal:** "Delete PO line from an Order and Bib record from the PAC before the PO is closed. In addition, renumbering of the lines after the deletion would preclude confusion about the total number of items left on the PO."**Enhancement#:** 152 (11/18/2003)**Category:** Acquisitions**Subcategory:****Software Version/Release:****Subject:** Module: ACQ Status: Release: 0 Priority: 3 Weight:**Proposal:** Duplicate title detection by Control Number (ISBN / ISSN / LCCN / OCLC). We would like to see duplicate titles detected and operator notified with option to verify we really want to order an additional copy. Detection is needed for PR records and records transferred from Searching. Detection should be based at least on ISBN/ISSN and OCLC number. Detection should also be definable by Location specific POs.**Enhancement#:** 153 (11/18/2003)**Category:** Acquisitions**Subcategory:****Software Version/Release:****Subject:** Module: ACQ Status: Release: 0 Priority: 3 Weight:**Proposal:** "Line Items with Multiple Parts. Need to be able to create multiple item records for a PO. Example: for an encyclopedia order, we have to enter each volume as a line item in order to track receipt of parts, barcode upon receipt, etc. Needs to be a way to handle these better."**Enhancement#:** 155 (11/18/2003)**Category:** Acquisitions**Subcategory:****Software Version/Release:****Subject:** Module: ACQ Status: Release: 0 Priority: 3 Weight:**Proposal:** Canceling PO line item automatically changes status in PAC and as PR status. Would like to have the canceled (or library defined) status automatically display in the PAC for items which have been marked canceled on a PO. And be able to do a search by PR status to locate canceled items

Enhancement#: 156 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 5.3 Priority: 0 Weight:
Proposal: Prevent display of titles in PAC until placed on order. We would like to be able to import OCLC records and not display them to patrons (staff PAC OK) until placed on order.

Enhancement#: 157 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 5.2 Priority: 3 Weight:
Proposal: "Display only workstation location's purchase request titles. Currently it takes several steps to determine if PR title is ours or another location's. If cannot limit the display to only one location's, display of 'owning' location would be helpful."

Enhancement#: 158 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: The ability to search by borrower or requester.

Enhancement#: 159 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:
Proposal: The ability to merge budgets

Enhancement#: 160 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 5.1 Priority: 0 Weight:
Proposal: "A pull-down menu report of titles by vendor, to include extended price(s)."

Enhancement#: 161 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 0 Weight: Medium
Proposal: Choice of setting item creation on the PO header or the PO line item.

Enhancement#: 162 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 5.2 Priority: 0 Weight:
Proposal: Year End Script. Develop and support an SQL script to do a year end rollover.

Enhancement#: 163 (11/18/2003)
Category: Acquisitions

Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Test Release: 0 Priority: 0 Weight: Not Assigned
Proposal: Allow deletion of bibliographic information from the PAC for canceled titles even if all items on the purchase order are not closed

Enhancement#: 164 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 5.1 Priority: 3 Weight:
Proposal: Ability to use the same account name (with different amount and year) every year.

Enhancement#: 165 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 0 Weight: Large
Proposal: Acquisitions module should show a grand total of accounts.

Enhancement#: 166 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:
Proposal: "Print checks. The ability to print a letter/purchase order, a check with the purchase order attached, and a check after the order has been received. The ability to customize the check's Pay To portion to include the customer's name and address to be used with a standard business window envelope. The ability to customize the check to include the charge number and account number. The ability to print a check without an account. Due to discounts that we receive and other charges, we sometimes do not know what the exact amount will be. The ability to enter an approximate \$ amount in the system for accounting purposes and to print the check with a blank account."

Enhancement#: 167 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:
Proposal: "Multiple fiscal years, based on location. For multi site libraries with different fiscal years, need to set fiscal year at the location level, to allow for better reports and year end processing."

Enhancement#: 220 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: "Pease refer to enhancement numbers 645 through 649 instead of this description. Develop PO and PO Line records custom designed for the following Order Types: 1) Firm Orders, 2) Periodical/Serial Orders, 3] Multi-Part Monograph Orders, 4] Standing Orders for Monographic Series, 5] Blanket Orders, 6] Approval Plan Orders. These records should include fields that address the unique to requirments of the Order Type. e.g. Subscription period for Periodicals, Series Title for Standing Orders for a Mongraphic Series, Publisher for Blanket Orders, etc."

Enhancement#: 221 (11/18/2003)

Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:
Proposal: "Include the following fields on POs, in addition to those already present: Vendor's title number (tag 024); Subscription period; Series title (tags 440 & 8XX); Discount %; Discount cost; Barcode; Status; Itype; Collection Code; Local processing information (tag 948); Requested by; Order type; Format (e.g. serial, score, etc.); Physical type (e.g. microfilm, CD, etc.); Language code (tag 008)"

Enhancement#: 223 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: Allow for the currency description to display on the purchase order and in Detail Status (PAC) so that the currency of the price is clear (e.g. an indication of whether 25.95 is AUS\$ or NZ\$ or US\$)

Enhancement#: 224 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: Significantly increase the number of characters that can be displayed and printed on the printed PO so that additional data fields can be included. Increase the length of the title field to at least 250 characters and this to be included on the printed PO.

Enhancement#: 225 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 5.1 Priority: 0 Weight:
Proposal: "Ability to enter MARC records in the Acquisitions module (including imprint, edition, series and corporate author fields) and for these fields to print on PO"

Enhancement#: 226 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:
Proposal: "When invoicing, the operator has to go through PO to pick up titles. An easier method of selection is required such as giving each line on the PO a unique number (e.g. line 3 on PO 69=69.3)"

Enhancement#: 227 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: "Purchase Requests should include the following 'optional' fields: 1) Price, 2) Internal Note, 3) Stat Class, 4) Publisher, 5) Publication Date, 6) Edition. These fields should transfer when copying a title from a PR into a PO."

Enhancement#: 228 (11/18/2003)
Category: Acquisitions

Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: "The Ord. Note information within the Purchase Request should copy to the Order Note field in PO line, when copying a title from a PR into a PO."

Enhancement#: 229 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:
Proposal: "Have an option when manually entering a Purchase Request that selected fields appear on PAC (e.g. Title, Author, ISBN, Publisher, Pub. Date, edition) with an item status of 'purposed purchase'. In addition after it appears on PAC allow input from users for purposed purchase so that, for instance, a faculty member may comment 'this title is extremely desirable - can we order it now?'"

Enhancement#: 246 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:
Proposal: "Under VOUCHER, FIND VOUCHER include in the display options: 'Invoice #' and 'Reference'. These fields appear on the voucher when it is printed, but are NOT one of the display options!"

Enhancement#: 290 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:
Proposal: "In the titles by budget (report dropdown menu) header, include the 'budgeted amount' and 'amount available' in addition to the information already there... just as the budget summary view does."

Enhancement#: 375 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: "When an item is received in Acq, the operator should be notified if a request has been placed on that item so that it can go into an Urgent category for cataloging and processing."

Enhancement#: 376 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: The ability to reprint a claim

Enhancement#: 382 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: "Base currency should be the currency of the home country. In other words, British libraries need to be able to input the number of US dollars to One pound sterling."

Enhancement#: 383 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: PO internal note should transfer to statement when receiveing

Enhancement#: 384 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:

Proposal: Need to be able to receive supplier EDI reports.

Enhancement#: 409 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:

Proposal: Duplicate title detection by Publisher. Develop a warning of possible title duplication because of existing Blanket Orders and Approval Plan Orders. At the point where a record is sent to acquisitions the key word(s) of the publisher's name (tag 260 subfield b) should be checked against a list of Blanket Orders and Approval Orders. If it encounters an exact match already existing in ACQ a warning should be given and appropriate action options appear in the dialog box.

Enhancement#: 410 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:

Proposal: Develop a 'Cheaper Vendor' warning. When a record is transferred into the ACQ Module the system should check the key word(s) of the publisher's name (tag 260 subfield b) against the ACQ Vendor Record. A comparison should then be made of the '% Library Discount' of the publisher to the '% Library Discount' of the Vendor on the open PO. When the publisher discount is larger a warning should be given and appropriate action options appear in the dialog box. Example: You have an open PO with your vendor who gives a 15% discount. You send an Abingdon book which has a 40% discount to the PO. System should give a warning and provide action options.

Enhancement#: 471 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: Provide the ability to delete the PO Header (especially when a PO was set up erroneously)

Enhancement#: 472 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: Provide a warning when the Acquisitions operator selects a budget which is overspent.

Enhancement#: 473 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: It should not be possible to add a commitment to a closed budget. Someone with appropriate authority should have to change the budget back to open first.

Enhancement#: 474 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: Diacritcs should be ignored in all searching; including Vendor Description.

Enhancement#: 543 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: Add a price field to the Desiderata window.

Enhancement#: 544 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: BISAC purchase orders should reference the user-created po_number instead of the system-generated po#. User-generated po_numbers appear on printed purchase orders and in Edifact POs. They should also appear in BISAC POs for the same reasons.

Enhancement#: 551 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: "Need the ability to turn off Label Window prompt. Currently when candidates are selected to receive through an invoice (statement) the first window to appear is the Invoice Window (where the number of items to be received is entered), the next window is the Barcode Window, and the final window is the Label Window. As we never print labels we would like the ability to turn off the Label Window so that it does not automatically open."

Enhancement#: 552 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:
Proposal: "Requester Notification. Within the Acquisitions PO LINE, add 'NOTIFICATION' blink. Within the NOTIFICATION blink the requester name(s) could be entered and their phone number(s) and/or address(s). In addition have a 'print' checkbox that can be checked if you want the NOTIFICATION information to be printed when the title is rec'd. When the title is rec'd, HORIZON should display a warning message to warn the printer will be activated for each NOTIFICATION that has the 'print' checkbox on."

Enhancement#: 579 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: The ability to use electronic invoicing for periodical titles.

Enhancement#: 580 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: Ability to maximize windows in Acquisitions.

Enhancement#: 581 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: Ability to use the same statement number for multiple statements with different statement dates. Sometimes there is no statement number and we use the account number instead; this account number does not change from year to year but the statement date does.

Enhancement#: 582 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: "Provide a way to set the default display of the Acquisitions PO to include the number of items received, invoiced and cancelled (along with the title, price, etc.) Changing the mq_view to make these display has no effect"

Enhancement#: 622 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned
Proposal: The Accounting Reference number and/or the General Ledger number should appear on the fund hierarchy reports. We also would like the Accounting Reference number and the General Ledger number to become indexed fields so that reports can be generated from them.

Enhancement#: 623 (11/18/2003)
Category: Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 0 Weight:
Proposal: "A cancellation notice printed for a drop-shipped item should include the drop-ship information in the ship-to address field, not the default ship-to address."

Enhancement#: 645 (11/20/2003)
Category: ~~Circulation~~ Acquisitions
Subcategory:
Software Version/Release:
Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:
Proposal: Develop PO and PO Line records that are custom designed for Periodical/Serial Orders. Unique fields in these records would include: ISSN (tag 022), Publisher's order

number (tag 024), USPS number (tag 032) and Subscription period. The PO design must accommodate the placing of a single order based on a bibliographic title (tag 245) which results in the receipt of multiple issues or volumes, that may arrive at predictable or unpredictable intervals, and which are normally invoiced at designated renewal periods, although rate adjustments may be invoiced at any time. It must also accommodate changes to the title which may occur at any time within a subscription period.

Enhancement#: 646 (11/20/2003)
Category: ~~Circulation~~ *Acquisitions*

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:

Proposal: Develop PO and PO Line records custom designed for Monographic Series Standing Orders. Unique fields in these records would include: ISSN (022 tag), Series title. The PO design must accommodate the placing of a single order based on a series title which results in the receipt of multiple monographic titles, that arrive at irregular intervals, and which are invoiced upon receipt.

Enhancement#: 647 (11/20/2003)
Category: ~~Circulation~~ *Acquisitions*

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 2 Weight:

Proposal: Develop PO and PO Line records custom designed for Blanket Orders (i.e. everything published by a publisher, everything written by an author, etc.) and Approval Orders. A unique field in these records would include the contract number. The PO design must accommodate the placing of a single order based on a publisher, author, or subject which results in the receipt of multiple monographic titles, that arrive at regular or irregular intervals, and which are invoiced upon receipt.

Enhancement#: 648 (11/20/2003)
Category: ~~Circulation~~ *Acquisitions*

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:

Proposal: Develop PO and PO Line records custom designed for material received as a result of a Membership. Unique fields in these records would include the contract number and a membership renewal period. The PO design must accommodate the payment of a membership fee which results in the receipt of one or more monographic titles, and/or one or more Periodical / Serial titles, that may arrive at regular or irregular intervals, and which are invoiced based on the membership renewal period.

Enhancement#: 649 (11/20/2003)
Category: ~~Circulation~~ *Acquisitions*

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 1 Weight:

Proposal: Develop PO and PO Line records custom designed for Multi-part monographs. The PO design must accommodate the placing of a single order based on a bibliographic title (tag 245) which results in the receipt of multiple parts or fascicles, that arrive at irregular intervals, and which are invoiced upon receipt.

Enhancement#: 650 (11/20/2003)
Category: ~~Circulation~~ *Acquisitions*

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:

Proposal: Develop a method to archive inactive Vendor records and Completed or Canceled PO records. Consider, 1) placing a checkbox on Vendor records that would allow authorized personnel to assign them a status of ""archived"" 2) Optionally, allow POs that are cancelled or completed to be automatically removed from an Active index and placed with archived records 3) Allow easy access to both Active and Archived records either from a line choice under the pull down menu ""PO"" (e.g. ""Find PO by header"" and ""Find Archived PO by header"") or by checking a box on the ""Compound Search"" screen 4) Allow for easily reversing an archived record to active status again, by authorized personnel.

Enhancement#: 651 (11/20/2003)
Category: ~~Circulation~~ Acquisitions
Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:

Proposal: Develop an item/volume default distribution template that allows libraries who regularly order multiple copies of a title to predefined purchase order information (i.e. line items) so that information such as Location, Collection, and Budget can be automatically generated from the profile without requiring the operator to manually key in the same elements to the individual items. Design should allow for the creation and retention of several patterns for 2 copies, 3 copies, 4 copies, etc.

Enhancement#: 652 (11/20/2003)
Category: ~~Circulation~~ Acquisitions
Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: Release: 0 Priority: 3 Weight:

Proposal: Horizon should offer the option of encumbering adjusted prices based on the discount percentage entered in the Vendor record.

Enhancement#: 653 (11/20/2003)
Category: ~~Circulation~~ Acquisitions
Subcategory:

Software Version/Release:

Subject: Module: CAT Status: Release: 0 Priority: 3 Weight:

Proposal: Strengthen the links between item records in Cataloging and Acquisitions. When creating an item record in ACQ it should be possible to assign all varieties of item data, such as collection codes, volume information and itype, to each item. In addition, the call number should be entered automatically to the item record when one is present on the attached bib record and when a permanent bib record overlays the temporary bib record. Conversely, when item information is already present in Cataloging it should be possible to send that information to Acquisitions so that when the item arrives, the permanent barcode can be attached to the appropriate item record at receipt.

Enhancement#: 698 (11/18/2003)
Category: Acquisitions
Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: REQUESTS: PAGE DISPLAY: We would like to be able to alter the mq view for the screen that patrons get when they go to make a request. We want to have the screen laid out in such a way that the patron does not need to scroll down to get to the point where they enter their barcode and pin.

Enhancement#: 713 (11/18/2003)
Category: Acquisitions
Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: "Allow staff to attach borrower requests to PR's. Borrower requests would then transfer to the PO. If duplicate PR's are found and both have borrower requests , it should be possible to merge the requests, in proper order, eliminating duplicate borrower requests"

Enhancement#: 726 (11/18/2003)

Category: Acquisitions

Subcategory:

Software Version/Release:

Subject: Module: ACQ Status: None Release: 0 Priority: 0 Weight: Not Assigned

Proposal: "When a bib is sent from StaffPac to ACQ, the pub# should automatically copy (from the 028 field of the MARC record) onto the appropriate field on the PO"

Enhancement#: 1352 (05/19/1999)

Category: Dynix > Acq > REPORTS

Subcategory:

Software Version/Release:

Subject: Report of Encumbrance & Report of Expenditures printing

Proposal: Would like the Report of Encumbrance for Account and Report of Expenditures for Account to print the author field.

Enhancement#: 1976 (07/08/1999)

Category: Dynix > Acq

Subcategory:

Software Version/Release: CODI.ENH.... 1027

Subject: Non-Title Invoices -- Overexpenditures

Proposal: When using a non-title invoice you cannot proceed if the fund has a negative balance. The negative balance is created by the calculation of the expenditure plus the encumbrance. Need to be able to overcommit an underexpended fund when using a non-title invoice. With 151 you can place a regular invoice against a fund with a negative balance and only overencumbrance limit set. You need to set an overexpenditure limit to allow a non-title invoice to be placed against such an account. This is dangerous; it would be better to extend the ability to pass the invoice for an overencumbered but underexpended fund to non-title and miscellaneous invoices.

COMMENTS (Per Dynix): [Planned](#)

Enhancement#: 1977 (07/08/1999)

Category: Dynix > Acq

Subcategory:

Software Version/Release: CODI.ENH.... 1060

Subject: Vendors--Addresses

Proposal: Vendor records. When you look at a vendor record there's no way to tell how many addresses are attached, or if there is more than one address. People tend to assume there's only one address and don't go further to find the 'returns' address (for example). Have a function key for additional addresses, if there is more than one address attached to the record.

COMMENTS (Per Dynix): [8.0](#)

Enhancement#: 1982 (07/08/1999)

Category: Dynix > Acq

Subcategory:

Software Version/Release: CODI.ENH.... 1083

Subject: Reports--Display

Proposal: REPORT OF EXPENDITURES FOR ACCOUNT: Needs to display the Invoice number on it. Also, the GL# should display up by the Fund # in the header of the report. Redo the display.

COMMENTS (Per Dynix): [Planned](#)

Enhancement#: 1986 (07/08/1999)

