

Acquisitions—Purchase Orders

Enhancement#: 3714 (03/17/2004)

Category: Acquisitions

Subcategory: Purchase Orders

Software Version/Release:

Subject: Receiving Gifts

Proposal: In the Dynix LMS you can receive free gifts without having to create a dummy purchase order. This is not something that can be done on Horizon. Dynix will create the dummy PO behind the scenes and charge the gift to a gift budget. Many Dynix customers have asked for the same functionality in Horizon.

Enhancement#: 3750 (04/21/2004)

Category: Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3

Subject: Add the Ability to Enter Extra Charges at PO Level

Proposal: Please add the ability to enter extra charges to PO lines at the PO level. Currently, this is only available at the statement or invoice level. It would be nice if we could get this ability at the PO level so that budgets can be encumbered with the amount that will actually be spent getting the title.

Enhancement#: 3753 (04/22/2004)

Category: Acquisitions

Subcategory: Purchase Orders

Software Version/Release: CJK 7.2

Subject: Search PO by True MQ_INDEX , Like Staffpac

Proposal: The PO can be searched by table column ISBN directly but the library want to search PO by true mq index ISBN, like staffpac

Enhancement#: 3889 (08/13/2004)

Category: Acquisitions

Subcategory: Purchase Orders

Software Version/Release:

Subject: Discounted Price Column in PO Line

Proposal: We are using Titlesource11 from Baker and Taylor to order library materials and downloading the bib and the po information into Horizon. We set up the MARC profile list in TSII and MARC import source and Acquisition import map in Horizon.

So far all the information can be transferred from TSII to Horizon except the discounted price in PO line. The dilemma is TSII has the list price and the discount price that can be mapped to Horizon, but Horizon PO line only has list price and discount fields. For a typical shopping cart in TSII, there are several discounts for the items. So we have to manually update the discount field by matching the po line items with the TSII shopping cart items one by one after all the information is downloaded into Horizon. I would like to see the discounted price column in po line record and also be used to map the discounted price from TSII to Horizon.

In the po line list view, there is a ``on_order`` column, but it is not available in the po line edit view. It is also not available for mapping in Acquisition import map.

I have checked with Baker & Taylor on making the discount column available for mapping, but their answer is ``the actual discount percentage resides in a location different than all the rest of the price code and discounted price info, and it would take major development effort to get working the way Olivia wants. Maybe this is something we can do in the future.``

I sure hope Dynix and BT can work together in coming up with a solution that will make the downloading interface seamless without a lot of manual work still going into it.

Enhancement#: 3890 (08/16/2004)

Category: Acquisitions
Subcategory: Purchase Orders
Software Version/Release:
Subject: Workslip Note
Proposal: The new workslip note in ACQ are very welcomed by us but the most important information such as location, budget etc are located at the bottom of the printed version. When placed in the book only the information at the top are shown like po number, date etc. Why not place information about Location, Budget etc at the top as well.

Enhancement#: 3963 (09/23/2004)

Category: Acquisitions
Subcategory: Purchase Orders
Software Version/Release: 7.3.2
Subject: Additional Search Options for PO`s
Proposal: It would be very helpful if staff could search for a purchase order by:
 1. Bib number
 2. Barcode

This would save time and improve staff efficiency. You can get at this information now but it takes several steps in some cases. When the searcher knows the bib number why not let search by that immediately?

Enhancement#: 3964 (09/23/2004)

Category: Acquisitions
Subcategory: Purchase Orders
Software Version/Release: 7.3.2
Subject: Ability to Delete a Purchase Order
Proposal: At the times it is desirable to have the ability to immediately delete a purchase order. Currently the only way to ``stop`` a purchase order is to cancel it. We would like the ability, with appropriate permissions, to actually delete the purchase order from an acquisitions work station.

Enhancement#: 3974 (09/30/2004)

Category: Acquisitions
Subcategory: Purchase Orders
Software Version/Release: Horizon 7.3.2
Subject: Printed PO Content
Proposal: We would like to be able to specify what PO line data fields/elements can be printed on a purchase order. The other option, but less desirable, would be for all data fields on a PO line to print on a purchase order.

Enhancement#: 4014 (10/20/2004)

Category: Acquisitions
Subcategory: Purchase Orders
Software Version/Release: 7.3.2
Subject: Batch Edit POs
Proposal: Our ACQ staff has requested the ability to batch edit lines on a purchase order. For example, after importing a selection list they already know contains titles that would be funded from the same budget, and would have the same collection code...they would like to select the lines on the PO and edit the budget, collection & itype fields all in a batch. This would be a real timesaver.

Enhancement#: 4063 (12/02/2004)

Category: Acquisitions
Subcategory: Purchase Orders
Software Version/Release: 7.3.2
Subject: Allow Alterations to po_line View

Proposal: The po_line view does not allow alteration to the default columns displayed in the list view. These are hard coded. Allow this view to operate as others do so that alterations can be made permanent & do not have to be manually selected for each use.

Enhancement#: 4070 (12/08/2004)

Category: Acquisitions

Subcategory: Purchase Orders

Software Version/Release: Horizon 7.32

Subject: Edit Items on PO in Same Way as Edit Candidate on Invoice

Proposal: Our acq staff really like the way candidates for an invoice are processed, one right after the other, without having to close the one you just edited and open the next one. They'd like to have the same functionality when they open a PO and edit items there.

Enhancement#: 4128 (01/04/2005)

Category: Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.32

Subject: Add Location to PO Line

Proposal: We would like to add Location (from the distribution) to our po_line view, so we can see the locations without having to go in manually to each item and check.

Enhancement#: 4146 (01/17/2005)

Category: Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3.2

Subject: [Add a cancellation message to holds cancelled](#)

Proposal: At times acquisitions needs to cancel orders on items that are unavailable. Some of these items have requests on them and the requests are cancelled when the order is cancelled. Upon cancelling the request/order/ls a Request Deleted block is added to the borrowers blocks screen. There is no indication as to why the Request was deleted.

We would like to have an explanation (i.e. Unable to fill request, or something along those lines) either a default message or one that can be entered by ACQ staff included in this block. Is this possible?

Enhancement#: 4189 (03/01/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3.2

Subject: Non-filing Indicators in VIP Records

Proposal: When records are brought into a PO using VIP the short Marc record created does not include the non-filing indicators. Staff time is required to manually add these to each order record so that they sort correctly in the catalog. We would like the VIP software to allow the non-filing indicators to come over in the short Marc.

Enhancement#: 4213 (03/17/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: Horizon72.1.178h CJK

Subject: Add Some Fields in PO Header and PO Line Edit View

Proposal: We need to add the fields below in the PO header edit view and PO line view:

- account bank
- To company
- remit number
- to address
- postal code
- payee

telephone
mail address

I suggest that we may add a field such as NOTE to contain the information

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Enhancement#: 4294 (05/16/2005)

Category: Horizon > Acquisitions >

Subcategory: Purchase Orders

Software Version/Release: 7.3.3

Subject: ISBN Search Results - Show Locations

Proposal: When we perform an ISBN search from the p.o. screen, we would the results window to display the location of copies for any matches found. As it is we have to go over to stafpac searching to find out which locations have copies of titles matched by ISBN.

Enhancement#: 4295 (05/17/2005)

Category: Horizon > Acquisitions >

Subcategory: Purchase Orders

Software Version/Release: 7.3.2

Subject: To Make a Cancelled Subscription Complete When Renewing by Adding New PO Line

Proposal: When we cancel or discontinue a subscription or standing order in ACQ we want the system to automatically make the whole order complete.

Enhancement#: 4299 (05/18/2005)

Category: Horizon > Acquisitions >

Subcategory: Purchase Orders

Software Version/Release: 7.3.2

Subject: Call # in Edifact PO

Proposal: Presently, when we send an EDIFACT PO back to a vendor our call number does not appear. We are entering the call number in the 949 tag, but this is not getting transferred to the PO. If all is set up correctly shouldn't this call number move to the PO and then since we use enhanced services, this call number should be included in the EDIFACT PO?

The response I received from Dynix:

``Possible fields to be used in the Acquisitions Import Map are hardcoded in Horizon mainline code. Call number is not currently an option.

Suggested that the client submit an enhancement (good idea) request to have call number added to the list of fields available for import in the ACQ Import Map. In the meantime, the library will need to add the call number to the PO after the import.``

Enhancement#: 4342 (06/16/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: Horizon 7.3.3

Subject: Wanting to Batch-edit Budgets

Proposal: Could Budget appear on the Batch Change screen?

We're on Horizon 7.3.3.

Our Serials manager wonders if a budget field could be added to the view for batch changing PO's.

I open a PO, select all the lines and click Edit.

OK to Batch Change message.

Can a budget field be added to this screen?

Enhancement#: 4364 (07/13/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: Horizon 7.3.3

Subject: Sorted by Title by Default
Proposal: Dynix Log 1561765

When Editing a PO, it is possible for the records in the PO to be sorted by Title by default for all PO's? It is time-consuming to always select the ``Sort`` button and choose Sort by Title every time a PO is opened.

``Sorry, there is no way to currently do this within the latest version of Horizon. The source code controls how things are sorted on the PO and it is non-configurable. So, it would take an enhancement request to have a code change considered.

Enhancement#: 4367 (07/14/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3.2

Subject: Delete Bibs When Canceling Orders

Proposal: When order records are created by importing records into a purchase order from Baker & Taylor's Title Source II, Horizon does not set the ``Acquisitions Control`` flag. So when we cancel one of these PO lines, Horizon will delete the item, but not the bib during the course of cancelling the PO line. The bib remains with no item information because the record is not under Acquisitions control. We need to have PO lines created by importing records to be flagged as under Acq Control so that they can be removed at the same time as PO line cancellation instead of having to do an extra step manual deletion of the bib.

Enhancement#: 4398 (08/30/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: Horizon 7.3.2

Subject: Adding Lines to a Processed PO

Proposal: Horizon should alert staff before it allows po lines to be added to a PO that has already been processed. The message should force the user to ``undo some activity`` like it does when someone tries to make a change to a line that has already been approved. There should also be a privilege or passkey associated with this function. This past week we had a staff member add 33 lines to a PO that had already been sent to the vendor. They had to undo the activity on each line, delete them and then reenter them on a new PO. Luckily we caught the error.

Enhancement#: 4402 (09/06/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.4

Subject: Budget Default Option in PO Header (Like Options for Collection, Item Type) That Would Autopopulate Each Line of the PO

Proposal: Need a budget default option in the PO Header (like there's default options for Collection & Item Type) that would autopopulate each line of the PO.

Enhancement#: 4404 (09/09/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.4

Subject: Function: Importing Records From a Vendor into a Purchase Order

Proposal: When importing p.o. lines from a vendor into a purchase order we will occasionally have a situation where there are two records in our catalog that will have the same isbn number. Currently, Horizon drops the record on import since if there is more than one possible record the system does not know which record to attach the incoming p.o. line to. Also, when the record drops it does not cause an error to be written to the mistake error log. We would like to request that a fix be found for this problem in release 8.0, after all with consortia libraries using Horizon it is impossible not to have situations where there could be more than one record with the same isbn number. If a fix cannot

be easily written into 8.0 or another release that the isbn of any title in this situation trigger an error and that the isbn number be listed in the mistrake log. This would make it possible for the library to easily figure out which title had dropped off and manually add it to the purchase order.

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Enhancement#: 4425 (10/10/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3.2

Subject: Budget Allocation Restrictions

Proposal: Currently Horizon uses the fiscal year that the library has assigned in acquisitions parameters to complete a distribution budget field when using a distribution pattern. We want to be able to use a newly created budget (next fiscal year) when creating distribution patterns. For example, we have created our 2006 budget in order to encumber money for new popular titles that we want to get on order now so that customers can place their holds. Currently every single item must be manually changed individually to reflect the 2006 budget. This is a un-necessary restriction. Glve the library the option to have more than one fiscal year budget open at the same time so that distribution patterns can be created in multiple budget years.

Enhancement#: 4455 (11/21/2005)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3.2

Subject: Total the Quantity Column

Proposal: We often create large POs with our major vendors. At the end of the PO we get a very nice total of money for the PO but we don't get a total of the quantity ordered. We have to go in by hand and count those. I would like the PO to do a total on the quantity column.

Enhancement#: 4541 (03/02/2006)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3

Subject: Cancel Option Permanent Display in PO Edit

Proposal: Make cancel option permanent display in PO Edit

Enhancement#: 4543 (03/02/2006)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3

Subject: Alpha Sort by Title

Proposal: PO's always need to be sorted--can they be displayed in alpha order without sorting every time?

Enhancement#: 4541 (03/02/2006)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3

Subject: Cancel Option Permanent Display in PO Edit

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Enhancement#: 4543 (03/02/2006)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3

Subject: Alpha Sort by Title

Proposal: PO's always need to be sorted--can they be displayed in alpha order without sorting every time?

Enhancement#: 4557 (03/24/2006)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: horizon 7.33

Subject: Import Acquisition Map

Proposal: In the current version 7.3x, import acquisition map is specified in import source and has a one-to-one relationship. We have to create multiple import sources when we need to use different import acquisition map. It would be more efficient and intuitive if the acquisition map is independent of import source. Instead of specify the import acquisition map in the import source table, we would like to specify the import map at the same time as we specify the import source when we import records on the multi-format import window. In other words, we would like to move the following two fields in import source table to the multi-format import window for specifying acquisition import option:
create acquisitions records
import acquisitions map

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Enhancement#: 4634 (11/02/2006)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.3.4

Subject: Allow connecting existing author authorities to a PO line item

Proposal: To prevent creating new author authorities when a PO line item is approved (with item creation set), allow the PO line item to search against author authorities and attach an existing one to the line item. This will also help patrons who are searching for new works by that author to find items on order as well as prevent the creation of new authorities in the database that then have to be cleaned up later.

Enhancement#: 4655 (01/09/2007)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release: 7.4

Subject: Po_Line Display - Default Columns

Proposal: In the po-line display, we would like to be able to choose which columns are default or add more default columns. Specifically, in the edit display, we would like to have ``cancelled`` as a default column so that we don't have to hit display everytime to see that information. The columns for edit display are hardcoded and we can't add a column to display automatically.

Enhancement#: 4677 (05/10/2007)

Category: Horizon > Acquisitions

Subcategory: Purchase Orders

Software Version/Release:

Subject: Printing PO's Sorted the Way Client Wants Them

Proposal: Printing a P.O. case # 1680702 in logexpress

We created a p.o. with about 43 titles inputted from April 24 to today. Before printing, we select a new sort - by title and the screen display is great but the printout doesn't reflect the new sort - it is strictly by p.o. line #. Each line is approved separately because that works best for our purposes. How can we sort and print the entire p.o. in the order we want?

SirsiDynix help desk replied -

You asked a very good question. You cannot do an alpha sort by title except on the screen. I looked at the source code. This sort is view only based and cannot be sorted so that PO's print in alphabetical order. PO lines are only printed in the order of the po line number. So, please put this in as an

enhancement.

Sorry, there is no way to currently do this within the latest version of Horizon 7.3x or 7.4. The source code controls how things are sorted on the PO and it is non-configurable. So, it would take an enhancement request to have a code change considered. This would be a great enhancement request.