NAAUG Tracking Number: ACQ-19-01 (Previously requested)

Descriptive Title: Check for duplicate invoice numbers should not be case sensitive.

Problem Statement: System does not consider invoice numbers that are the same except for case as duplicates.

Concise Description of Functionality Desired: When system checks for duplicate invoice numbers, it should consider numbers that are the same except for case as duplicates. For example, 21NM/ka20030707 and 21NM/KA20030707 should be recognized as duplicates.

Concise Rationalization of Request: We discover many duplicate invoice records because staff members entered alphanumeric invoice number once with lowercase letters then again with uppercase letters, and do not realize that the invoice record already exists. Catching these errors and cleaning them up is time-consuming.

Site Submitting the Request: Harvard (16.02)

Examples, Screen Shots: NA

Additional Information: This was #2 of top 5 ACQ enhancements last year. Ex Libris assigned it 5 development points. It received 110 votes. It was #20 in final 2003-2004 NAAUG voting.

NAAUG Tracking Number: SER-19-02 (Previously requested)

Descriptive Title: Changes made to Serial order record vendor information tab should carry over to the Subscription Record and this information should be labeled consistently.

Problem Statement: When a vendor change is required for a serial order, changes made to the serial order record do not automatically carry over to the serial subscription record, even if the subscription record is linked to the serial order record. An additional problem exists in that the labeling of certain fields in
the Serials Order Record is labeled as something else in the Subscription Record, and this can cause confusion with some staff members.

**Concise Description of Functionality Desired:** In Acquisitions/Serials, when the user makes a change to a field in the Vendor Information tab of the Serial Order Record (S Type Order), the system should automatically make the change to the appropriate field in the Subscription Record. In addition, the labels for the information from the Serials Order Record should be consistent in the Subscription Record.

**Concise Rationalization of Request:** In versions 15.2 and 16, vendor information will carry over from the serials order record when you create a subscription record in the Acquisitions/Serials module. The vendor information will not change if you change the subscription period subsequently. For consistency’s sake, subsequent changes should also be carried over to the Subscription Record.

Some of the fields are labeled differently in the two modules. Specifically, changes in the following fields should carry over from the z tables:

<table>
<thead>
<tr>
<th>z68 column</th>
<th>z16 column</th>
<th>Label in GUI</th>
</tr>
</thead>
<tbody>
<tr>
<td>z68_vendor</td>
<td>z16_vendor_code</td>
<td>Vendor Code</td>
</tr>
<tr>
<td>z68_vendor_reference_no</td>
<td>z16_vendor_order_no</td>
<td>Vendor Reference</td>
</tr>
<tr>
<td>z68_delivery_type</td>
<td>z68_delivery_type</td>
<td>Delivery Type</td>
</tr>
<tr>
<td>z68_subscription_date_from</td>
<td>z16_copy_from_date</td>
<td>Subscription Start</td>
</tr>
<tr>
<td>z68_subscription_date_to</td>
<td>z16_copy_to_date</td>
<td>Subscription End</td>
</tr>
</tbody>
</table>

This enhancement will allow libraries to be more productive by eliminating the currently manual, two-record update process into a single process requiring the editing of one record only. This will increase both efficiency and accuracy, thus avoiding mistakes in serials claiming.

**Site Submitting Request:** Harvard (16.02)

**Examples, Screen Shots (if appropriate):** N/A

Additional Information: This enhancement request appeared on the NAAUG Serials Enhancement List last year as item SER-Request18-01 and previous years as well. Last year ExLibris assigned 15 points. It received 202 votes.
Descriptive Title:
Add Budget as column heading option for Invoice List.

Problem Statement:
The budget number does not display (and there is no option for it in the header configuration) in the Invoice List (upper pane in Order tab/Invoice node).

This is a problem once an invoice record has been approved (changed to Payment Status P) by our library business office. Once an invoice is Payment Status P, when you click Budgets in the lower pane to view the budget, you get the error message "User denied permission for invoice payment status ‘P’." When you click OK to that message, you get the message "Budget can be accessed only after invoice details are reported."

We are not sure what the last message means. With version 16, user privileges dealing with general invoices were made finer, so that users could be prevented (and rightly so) from updating invoices after they were paid. Apparently the system will not let us even view budgets to prevent us from updating the invoice.

Concise Description of Functionality Desired:
Add the option for a Budget header in the header configuration for Invoice List so that we can see the budget for a line item from the Order tab.

Concise Rationalization of Request:
There is no way to see the budget for a line item with Payment Status P from the Order tab. We want to have the option to view the budget from the Invoice List.

Site Submitting the Request:
University of Minnesota (version 16)
Examples, Screen Shots:

No option for a *Budget* header in the header configuration for Invoice List:
Error message when you click **Budgets** button for line item with Payment Status **P**: 

![Image of the error message](image-url)
NAAUG Tracking Number: SER-19-04 (Previously Requested)

Descriptive Title: Enhancements to the Global Change button found in the Acquisitions/Serials Module.

Problem Statement: There are not enough options available to staff when selecting a set of items for global change.

Concise Description of Functionality Desired: Enhance the functionality of the Global Change button in the Cataloging and Acquisitions/Serials Modules.

Concise Rationalization of Request: We would like to see the Global Change button enhanced to provide more options for staff in selecting parameters for global change.
A major problem with the Global Change button in the Acquisitions/Serials Module is that the Global Change button limits the choices staff has for changing item records. For example, we would like to be able to:

- change the material type on a set of items
- change the Arrival Date on a set of items
- change the Order Number for a set of items (useful for title changes)
- change the Subscription Sequence Number for a set of items

**Site Submitting Request:** Harvard (16.02)

**Examples, Screen Shots:** N/A

**Additional Information:** This enhancement request is derived from a previous enhancement request made in 2002: NAAUG 2002-005 (SER-2002-01-F) *Item Global Change in Serials.* Ex Libris allotted 10 development points for this request. The request made it into the final voting for Version 17 enhancements with 161 votes. However, when Version 17 enhancements were re-voted last year, it did not make the final list. On the 2003 ballot, this enhancement request received 74 votes.

**NAAUG Tracking Number:** SER-19-05

**Descriptive Title:** Subscription record field for “related title” information

**Problem Statement:** The system currently has no mechanism to retrieve multiple subscriptions that are related to one order when there is no order record attached to the subscription records. For example, if we have an order for a membership, we currently create subscription records for the journals received as benefit of that membership, but do not create orders for these titles. There is no mechanism to retrieve a list of subscription records related to the membership order. Putting the order number of the membership in the Order No.: field of the journal subscription records allows us to find the main order, but does not function in any way to get is from the main membership order to the list of subscriptions.

**Concise Description of Functionality Desired:** We would like a new field created in the subscription record that would allow retrieval of titles that are related to one another by the order on which they are paid – memberships, combined subscriptions, etc. We would like this field to function in such a way that if 10 titles are related to one paid order, we can retrieve a list of them even if the 10 titles have no orders attached to them.
Concise Rationalization of Request: There is often a need to work on lists of titles that are related to one another via a common order. For example, if we cancel a membership order, we need a way to retrieve the subscription records of all the titles that are benefit of that membership so that we can close them. Searching the order number of the membership order does not allow this functionality. Putting notes of membership benefit titles in the order log requires maintenance as titles change, are added or removed from the package.

Site Submitting the Request: UC Davis (v.16.02)

NAAUG Tracking Number: SER-19-06

Descriptive Title: Index and search option for Subscription records

Problem Statement: There currently is no way to search fields of the subscription record similar to the way one can perform an Order Search.

Concise Description of Functionality Desired: It would be useful to have various fields of the subscription record indexed and have the ability to search those indexes and apply filters to the search much in the way the Order Search works.

Concise Rationalization of Request: There currently is no way to bring up lists of subscriptions with common data elements unless there is an order attached and we do not attach orders to all of our subscriptions. For instance, it could be desirable to search for subscriptions from a particular vendor, or with a particular sublibrary and/or collection, or with a certain item status, etc. This is often a requirement when special projects need to be completed.

Site Submitting the Request: UC Davis (v.16.02)

NAAUG Tracking Number: SER-19-07 (Previously Requested)

Descriptive Title: Check-in Note (Subscription Information Form (tab 3) should display even when an item is received from the Item List.

Problem Statement: If an item is received from the Item List the operator has no way of knowing whether a check in note exists.
**Concise description of functionality desired:**
The Check-In Note only displays when using Arrival. There are many instances when it is not possible to predict arrivals and arriving is done from the Item List. When that happens, the Check-In Note is not displayed. If the note can not be displayed as part of the receiving process, at least there should be an indicator of some kind (a symbol, icon) to alert the operator to the presence of a Check-In Note so that the operator could then view the note from the Subscription form (tab 3).

**Concise Rationalization of Request:**
The Check-In Note contains essential information that the operator needs in order to process items correctly. Having to either maintain a separate file of titles with check in notes and accessing that file constantly as items are received, or having to remember which titles have check-in notes so that the subscription record can be reviewed for the information, are inefficient ways to handle receiving. At the very least, there should be some kind of visual (or oral) indicator that alerts the operator that there is a check in note.

This request was submitted in 2003-2004 by USMAI.
Submitted by USMAI
Version 16.02