

## EndUser 2007 SIG 039—Acquisitions Ex Libris Responses

1. Please describe exactly how you envision the ability to delete bibliographic records attached to POs will work. How will permissions to delete bib records be controlled? What module will the deletions take place in (Cataloging and/or Acquisitions)? What level of granularity will exist in SysAdmin? Will a hierarchy of permissions exist? Will this functionality be controlled by the status of the PO? Will the operator get a warning if an open component exists? What will the impact be on reports? Can this feature be disabled completely?

**Ex Libris Response:** As Voyager 7 moves through development, more details about this new feature will be available in the Release Notes. Voyager will build on this feature using existing functionality and granularity that is presently found in the clients. In addition, two additional features relating to bibliographic record control and purchase orders (enhancement [#117009](#)—the ability to re-link to a different bibliographic record or MFHD and enhancement [#100954](#)—the ability to merge existing bibliographic records with specified fields as in bulk import and with transfer of existing MFHDs and items regardless of PO status) will resolve the majority of situations surrounding this topic.

2. Will the limitations in printing within the Acquisitions module be investigated and improved? In the past little emphasis has been placed on improving printing capabilities in the Acquisitions module. Last year Endeavor indicated that no future development was planned in response to our question last year. Several times in general sessions Ex Libris managers talked about increasing productivity in back office functions. The lack of screen printing functionality reduces productivity in the Acquisitions (and Cataloging) module. Staff cannot print an entire result set. Purchase orders and invoices must be printed through a separate module and must be requeued in order for multiple copies to be printed. For sites that are required to submit multiple copies of POs and/or invoices the inability to request multiple copies reduces efficiency. Staff often needs to be able to print result sets to further investigate problems.

**Ex Libris Response:** The need to print in various modules is something that warrants larger discussion within the Voyager community. To that end, Ex Libris will suggest to the Product Working Group that this issue be considered for inclusion in the Voyager 8 enhancement process. The new process allows customers to provide comment on key needs in selected functional areas. Ex Libris will look forward to additional feedback on this issue.

3. When will any workflow analysis of the Acquisitions module take place? Inconsistencies and limitations in functionality within the Acquisitions module create

frustration and reduce staff productivity. Currently when splitting funds you must use whole percentages. However, it would be much more useful to be able to split funds by exact amounts. Anytime an operator changes an intended location of an approved line item they must re-input the fund information. Unlike some other areas of the module, in this case you cannot use the fund code you must select the fund from the fund hierarchy. In many cases the fund does not change, only the location changes. The operator must go through multiple steps. The inability to use the fund code further complicates the process. While the default settings offer an opportunity to reduce the amount of clicking, fund codes may not be used in this part of the module either. In order to set a fund as the default, it must be selected from the hierarchy. A similar problem exists if an operator needs to select a different location from the default setting in the "quick item" box. Changing the intended location results in the need to edit the number of copies, the ledger, and fund information which often requires the operator to set them back to their default settings.

**Ex Libris Response:** Ex Libris will recommend to the Product Working Group that workflow issues be considered for inclusion in the Voyager 8 enhancement process and will seek additional information from users about the needs in this area.

Please note that we have no open enhancement requests for many of the features listed here. So that product management can fully consider needs across the product, please ensure that you document any issues and submit them as enhancement statements.

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