Acquisitions Sharing Session
And all that Acquisitions jazz
Moderated by Brian Sherman
Agenda

• Introductions
• Enhancements for Symphony 3.3
• Enhancements for Symphony 3.31
• EDI Ordering / Invoicing
• Open Q&A
Enhancements for 3.3

- Funds
- Orders
- Invoices
- EDI X12
- Rollover
- Taxes
2 New Fund Levels

• Fund Level 5 & 6
Vendor Interface Port (VIP)

- Simultaneously search a vendor / OPAC
- Check vendor availability
- Dropdown menu to resubmit search with another vendor
- Create temp bib records from vendors bib records / overlay those with ISBN as a match point
- Enable in add basic order properties
VIP Participating Vendors

- Family Dollar, Kmart, Starbucks, Boudreaux Cajun Meats....wait, wrong vendor list
- BT INGRAM BWI MIDWEST TAPE ULS
Material Type

• Material type field EXCLUSIVELY for acquisitions (fancy that – we’re part of a member’s only club now)
• Customizable data type
• Orderline and Invoiceline
• Orderline and Invoiceline Reports
Workslip Printing at Receiving

- Material type field EXCLUSIVELY for acquisitions (fancy that – we’re part of a member’s only club now)
- Bib entries and order/orderline extended info
- Line / Cycle / Vendor Information
- Quantity, fund code and holding code included for each distribution
Acquisitions Workslip PO-1784/1/2008/MAIN/BT

PO-1784/1/2008/MAIN/BT
Personal author: Bellairs, John.
Title: The house with a clock in its walls [sound recording] / by John Bellairs.
Call number: PZ7 .B413 HO 1992B
Orderline ISXN: 1556905874
Parts in set: V. 1%4
Title control number: i9781556905872
Catalog key: 14700
Price: $24.99
Quantity ordered: 7
Quantity received: 7
Holds: 6

Order extended information
Instructions: RUSH

Orderline extended information
Note: Send directly to Lisa Witteman.
Comment:

Received: 09/11/2008 Packing List: PACKING-1118

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<th>Quantity</th>
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<td>+900200000</td>
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<tr>
<td>1</td>
<td>MARVIN</td>
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Item Price

• During ADD ORDERED ITEM TO CATALOG, set properties to control the item price:

  Paid Price (previous)
  Ordered Price
  Paid Price or Order price (greater of the two)
Prorate Negative Amounts (Discounts)
PO-1784/1/2008/MAIN/BT

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EDI X12

- Specific error messages instead of getting the following message “the needle you’re looking for… well, it’s in this haystack somewhere.”
- Identifies underfunded orderlines in the results
Reports

• Rollover reports now have a vendor option tab; can rollover receipt and claim information
• List Vendor Order, Lines Report
Prompt for On-order hold cancellations

- Cancel order (example)
- Changing hold code to a non-holdable code (example)
Enhancements for 3.31

NO BIG WHOOP
EDI Ordering / Invoicing

- Midwest ILS is now set up to use EDI invoicing with book purchasing
Q and A

FROST/NIXON