FOLIO Acquisitions Orchid Release Highlights

FOLIO PM
February 21, 2023
Allow user to edit the fund distribution(s) of an open order with related invoice(s)

- **What:** User is able to edit the fund distribution(s) of an order line with related paid invoice(s)

- **Positioning statement:** For acquisitions staff, edit fund distributions allows users to manage commitments for the coming year by unlocking the ability to move encumbrances to different funds

- **Feature(s):** [https://issues.folio.org/browse/UXPROD-3810](https://issues.folio.org/browse/UXPROD-3810)

- **Tied to a roadmap item:** Yes

- **Note:** Previously it was not possible to edit Fund distribution while invoice was paid in current Fiscal year.
Allow user to rollover the “cash balance” of budgets

- **What:** Allow user to rollover the remaining “cash balance” of budgets as a transfer or allocation

- **Positioning statement:** acquisitions administrator rollover cash balance prevents encumbered values being counted twice during rollover by allowing user to rollover value that is not spent or only committed.

- **Feature(s):** [https://issues.folio.org/browse/UXPROD-3964](https://issues.folio.org/browse/UXPROD-3964)

- **Tied to a roadmap item:** Yes

- **Note:** Encumbered value is already removed from available amount so library is leaving commitments in past year.
Display the history of edits for the order and order line

• **What:** Allow user to access a log of all edits made to an order or order line.

• **Positioning statement:** For hosting providers and acquisitions staff visible order history improves the ability to troubleshoot order issues. Satisfy auditors. AND gather the information needed to more effectively manage acquisitions

• **Feature(s):** [https://issues.folio.org/browse/UXPROD-3215](https://issues.folio.org/browse/UXPROD-3215)

• **Tied to a roadmap item:** Yes

• **Note:**
Set default of “Find or Create” holdings for orders created via API

- **What**: Use find or create new holdings logic by default for orders created via edge-orders

- **Positioning statement**: For ordering staff having default Find or create logic prevents the constant duplication of Holdings records for orders created via edge-orders (GOBI).

- **Feature(s)**: [https://issues.folio.org/browse/UXPROD-3878](https://issues.folio.org/browse/UXPROD-3878)

- **Tied to a roadmap item**: Yes

- **Note**: For the last 3 releases GOBI was always creating a new holding. Now it will only create new if there isn’t one already for that location
Implement data consistency Piece->Item

• **What:** Ensuring that when a piece is connected to an item and piece details like copy number are updated the related item is updated as well

• **Positioning statement:** For receiving librarians having data consistency automated will save time and maintain consistency between data in receiving and inventory applications

• **Feature(s):** [https://issues.folio.org/browse/UXPROD-3342](https://issues.folio.org/browse/UXPROD-3342)

• **Tied to a roadmap item:** Yes

• **Note:** Managing this in the other direct Item->piece was split. This functionality leverages the event driven architecture.
Inventory browse UX refactor

- **What:** Improve user experience and refactor code to improve the performance and functionality of Call number browse

- **Positioning statement:** For cataloging staff browse UX enhancements will improve the user experience of inventory browse

- **Feature(s):** [https://issues.folio.org/browse/UXPROD-3762](https://issues.folio.org/browse/UXPROD-3762)

- **Tied to a roadmap item:** No

- **Note:** Picked up work to help manage gaps in UI development backlog
Questions