Agenda and Meeting Notes

The Acquisitions Group Meets via Zoom every Tuesday 1-2pm Eastern U.S. time and every other Friday 9-10am Eastern U.S. time.

**TUESDAY MEETING ZOOM LINK**

Join from PC, Mac, Linux, iOS or Android: https://zoom.us/j/353648867  Meeting ID: 353 648 867.

One tap mobile: +16468769923,,353648867# US (New York)  +16699006833,,353648867# US (San Jose)

Dial by your location : +1 646 876 9923 US (New York)  +1 669 900 6833 US (San Jose) or Find your local number: https://zoom.us/u/adpH5TcgX

**FRIDAY MEETING ZOOM LINK**

Join from PC, Mac, Linux, iOS or Android: https://zoom.us/j/675766727

See FOLIO meetings with Zoom for more information on how to connect.

Or mobile phone one-tap (US Toll): +1646558656,675766727# or +14086380968,675766727#

Or Telephone:

Dial: +1 646 558 8656 (US Toll) or +1 408 638 0968 (US Toll)

Meeting ID: 675 766 727

International numbers available: https://zoom.us/zoomconference?m=Uz8gOxV-yqHRNcWlZKa4trK_0dP7WPf

See FOLIO meetings with Zoom for more information on how to connect.

Recordings

- From February 8, 2022 to current are located https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/ (use the same FOLIO Zoom calls password to access recordings)
- Recordings of older meetings (prior to February 8, 2022) -- see Google Folder: https://drive.google.com/drive/folders/1QGv745JZlpUrPqrRcooQMNZ44roMPXK6

New member Onboarding info/resources -

- Getting Started with Acquisitions (courtesy of Molly Driscoll)

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**Friday, January 5, 2024**

Acquisitions SIG meeting resumes - agenda will be posted as soon as it’s available

**Tuesday, January 2, 2024**

(meeting cancelled - holiday break)

**Tuesday, December 26, 2023**

(meeting cancelled - holiday break)

**Friday, December 22, 2023**

(meeting cancelled - holiday break)

**Tuesday, December 19, 2023**

(meeting cancelled - holiday break)
Tuesday, December 12, 2023

Housekeeping -

- Reminder - Acquisitions UAT Organization - Banking information runs thru this Friday (Dec. 15th), please participate if you can
- Monthly SIG reports to Product Council will be this Thursday (Dec. 14th), if you have anything specific that you'd like SIG Convener to be included /highlighted in the report to PC, please reach out to the Convener. Also round-robin discussion questions proposed by PC -
  ◦ What's one thing that happened within your SIG that is a particular accomplishment that you want to share with others?
  ◦ What's something that you are wondering about in relation to FOLIO development?
  ◦ What's something that you expect to be working on in the next quarter?

- Polling re: next scheduled meeting - Tuesday, Dec. 19, at 1 pm Eastern

Business -

- If POs don't have specific topics to discuss/review, checking in with forming a sub-group to discuss alignment of Item>piece>serial check-in data

Friday, December 8, 2023

Housekeeping -

- Dennis is out of the office today
- Next meeting - Tuesday, Dec. 12, at 1 pm Eastern

PC Update (Kristin Martin) -

- Conversation at last two meetings focus on some questions that Metadata Management had around entity management and how to structure work (SIG or subgroup)?:
  ◦ 2023-11-30 Agenda and Meeting notes
  ◦ 2023-12-07 Product Council Meeting Agenda and Notes
- Next week in-meeting SIG update

Business -

- Announcement re: upcoming user acceptance test schedules (Joe Reimers)
- German Acquisitions community feature request presentation (further integration of "e-mail" in the integration details in the Organization app) Björn Muschall
- If time permits, continue to discuss strategies of involving expertise from various SIGs to address and anticipate all scenarios regarding serials prediction pattern and how to enter piece data (vol. issue. year, month, etc.) in Receiving app that would serve what the majority of FOLIO libraries' needs

Tuesday, December 5, 2023

Housekeeping -

- Next meeting, Friday (Dec. 8) at 9 am Eastern - German Acquisitions community's will present a feature request about further integration "e-mail" in the integration details in the Organization app
- Confirm Acq. SIG meetings during holiday break - meetings scheduled for Dec. 22, Dec. 26 and January 2 are cancelled. First Acq. SIG meeting in 2024 will be Friday, January 5 (9 am Eastern)

Business -

- Dennis reviewed new development re: prediction pattern for serials and where to enter data such as vol. issue, year for journals in relation to Serials App deployment in Quesnelia release (Serials Publication Patterns wiki)

Tuesday, November 28, 2023
Housekeeping -
- Next meeting is next Tuesday, Dec. 5th at 1 pm Eastern
- Checking in re: upcoming holiday break of scheduled SIG meetings

PC Update (Kristin Martin) -
- Upcoming: meeting whether we want an Entity Management SIG (November 30): 2023-11-30 Agenda and Meeting notes
- Application formalization group (cross council) work has begun
- Poppy Bugfest has concluded except for ECS (extended consortial support)
- Invite SIG conveners to meeting on 12/14

Business -
- Discuss Implementers Topics #110 & continues (discussed #110, #111 & #112)

Friday, November 24, 2023
(meeting cancelled - Day after Thanksgiving)

Tuesday, November 21, 2023

Housekeeping -
- No meeting this coming Friday (11/24)
- Next meeting - Tuesday, 11/28, at 1 pm Eastern
- Currently planned for Dec. 8 (Friday) at 9 am Eastern - Bjorn Muschall on behalf of German Acquisitions community's will present a feature request about further integration "e-mail" in the integration details in the Organization app for sending orders via email

Business -
- Kim Wiljanen will present Michigan State Univ. Library's workflow using Data Import to create orders with MARC records for various types of orders (Thank you Kim!!)
- Link to the video Ann-Marie created that Kim shared during her presentation today

Tuesday, November 14, 2023

Housekeeping -
- Reminder - Next meeting, Tuesday (11/21) at 1 pm Eastern, Kim Wiljanen will demo Michigan State University Libraries' workflow using Data Import to create orders with MARC records for different type of orders
- Looking for a volunteer to take meeting notes today
- We will not meet on Friday (11/24), Day after Thanksgiving

Business -
- FOLIO Acquisitions documentation discussions with Molly Driscoll - gather recommendations for post-Poppy enhancements and clarifications & some ideas Molly had to present to the group (Thank you, Molly!!)

Friday, November 10, 2023
(meeting cancelled)

Tuesday, November 7, 2023
(meeting cancelled)
Tuesday, October 31, 2023

Housekeeping -

- Reminder - Poppy Bug Fest continues thru this Friday (Nov. 3)
- If interested, join Product Council meeting this Thursday at 10 am Eastern to provide feedback re: User Acceptance Testing discussions or leave feedback via Slack to Kristin Martin
- Presentation by Molly Driscoll and Poppy documentation discussions scheduled for Nov. 14 (Tuesday at 1 pm Eastern)
- Tentatively planned for Nov. 21 (Tuesday at 1 pm Eastern) meeting - Kim Wijjanen will demo Michigan State University Libraries' workflow using Data Import to create orders with MARC records for different type of orders
- Next meeting - Tuesday, Nov. 7 at 1 pm Eastern (please note US. Daylight Saving Time ends this coming Sunday, Nov. 5)

Business -

- Joe will discuss a new feature planned for Quesnelia - restricting funds to specific locations

Notes: 2023-10-31 Acquisitions Meeting notes

Recording: Acquisitions-sig/2023-10-31

Friday, October 27, 2023

Housekeeping -

- Please fill out App Interaction SIG survey regarding if text fields across apps should be responsive or not if you have a few moments (survey opens thru Nov. 10)
- Poppy Bug Fest testing cases thru Friday, Nov. 3 - THANK YOU FOR PARTICIPATING!!!
- Presentation by Molly Driscoll and Poppy documentation discussions planned for Nov. 14 (Tuesday) at 1 pm Eastern
- Next meeting - Tuesday, Oct. 31, at 1 pm Eastern
- Reminder - U.S. Daylight Saving Time ends Sunday, Nov. 5 (you may need to adjust meetings on your calendar if you have a local Daylight Saving Time that is on a different schedule)

PC Update -

- postponed to the next Friday meeting (Nov. 10) as Kristin M. is out of the office

Business -

- Dennis plans to review new Acquisitions related features planned for Quesnelia Release (spring 2024)

Notes: 2023-10-27 Acquisitions Meeting notes

Recording: acquisitions-sig/2023-10-27

Tuesday, October 24, 2023

Housekeeping -

- Poppy Bug Fest runs Monday, Oct 23 thru Friday, Nov. 3 (more info see - Bug Fest 2023 Poppy wiki)
- Next meeting, this Friday (10/27), at 9 am Eastern

Business -

- Dennis plans to review Poppy Release highlights
- Acquisitions Interface fields google doc

Notes: 2023-10-24 Acquisitions Meeting notes

Recording: acquisitions-sig/2023-10-24

Tuesday, October 17, 2023

Housekeeping -

- Reminder - Poppy Bug Fest claiming test cases thru this Friday (10/20/23) - more info see Kimberly Pamplin Slack message reminder
- Check out Implementers SIG meeting notes & recording (10/17/23) re: Serials: development progress and plans (A presentation by Owen Stephens)
Next meeting - next Tuesday, Oct. 23, at 1 pm Eastern

Business -

Discuss EDI ordering - looking to hear successful stories and any issues/roadblocks of unsuccessful efforts to help find solutions and for others who haven't implemented to learn

Notes: 2023-10-17 Acquisitions Meeting notes

Recording: recording 2023-10-17

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Friday, October 13, 2023

Housekeeping -

- Next meeting, Tuesday, 10/17, at 1 pm (Discuss EDI ordering)
- Reminder - Poppy Bug Fest runs thru next Friday, 10/20/23. Please participate if you can. more info see Puppy Bug Fest wiki
- An early reminder - U.S. Daylight Saving Time ends Nov. 5 (you may need to adjust meetings on your calendar from Nov. 5 on)
- Any special requests or specific issues to bring up to Product Council (to be included/submitted in monthly SIG reports to PC)

PC Update (Kristin Martin) -

- 2023-10-12 Tri-Council Meeting
  - Discussion of updates to FOLIO architecture and work to formalize the definition for application and platform
  - Many implications of this work, still being investigated.
- PC SIG subgroup refreshing how SIG reports and communication is handled.
  - Beta testing new Update format: SIG Reports 2023-10-19
  - Hoping to strengthen relationship between PC and SIGs

Business -

- Discuss GDPR requirements for record history (Joe Reimers)

Notes: 2023-10-13 Acquisitions Meeting notes

Recording: recording 2023-10-13

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Tuesday, October 10, 2023

Housekeeping -

- Next meeting, this Friday (10/13) at 1 pm
- Poppy Bug Fest runs this and the next week from 10/9/23 - 10/20/23, please participate if you can. More info see Poppy Bug Fest wiki
- Reminder - Discuss "EDI ordering" planned for next Tuesday, 10/17/23, at 1 pm
- Dennis can't make the meeting today (child sick/doctor visit)

Business -

- Discuss how multi-volume sets are handled

Notes:

Recording: recording 2023-10-10

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Tuesday, October 3, 2023

Housekeeping -

- Next meeting, Tuesday (10/10) at 1 pm

Business -

- Review updated Claiming mockups (Dennis)
- If time permits, Zorian Sasyk will present use cases of Supplementary Properties that we didn't get to from last Friday's meeting (9/29)

Notes: 2023-10-03 Acquisitions Meeting notes

Recording: acquisitions-sig/2023-10-03
Friday, September 29, 2023

Housekeeping -
- Next meeting, Tuesday (10/3) at 1 pm

PC Update (Kristin Martin) -
- 2023-09-28 Product Council Agenda and Meeting Notes
  - Discussed "time zone inclusiveness" for PC meetings
  - Changes to authentication tokens coming
  - Release management: Quesnelia timeline and thoughts about number of releases per year

Business -
- Supplementary properties and term filter builder demo (Many thanks to Owen Stephens)
- Discuss/demo how the above function(s) is/are used by institutions (Many Thanks to Ben Jahre and Zorian Sasyk, too!)

Notes: 2023-09-29 Acquisitions Meeting notes
Recording: Acquisitions-sig/2023-09-29

Tuesday, September 26, 2023

Housekeeping -
- Reminder - next meeting, this Friday (9/29) at 9 am Eastern - Owen Stephens' demo of supplementary properties and term filter builder with folks sharing how they use the functions
- Mark your calendar - Discuss "EDI ordering" scheduled for Tuesday, 10/17/23, at 1 pm Eastern

Business -
- Part 2 of "Package POLs" - (Many thanks again to Sara Colglazier) related wiki - Package POLs Container POLs

Notes:
Recording: acquisitions-sig/2023-09-26

Tuesday, September 19, 2023

Housekeeping -
- Reminder - Next meeting, Tuesday (9/26) at 1 pm Eastern - we'll have Part 2 of Package POLs discussions with Sara Colglazier
- Reminder - please take App Interaction survey UI for Save button if you haven't done so (open thru Sept. 19). Thank you for participating!
- Discuss "EDI ordering" planned October, exact date TBD

Business -
- Questions re: Donors - Joe Reimers
- Discuss Implementers Topics #96 (second half of the meeting)

Notes: 2023-09-19 Acquisitions Meeting notes
Recording: acquisitions-sig/2023-09-19

Friday, September 15, 2023

Housekeeping -
- Reminder - on Friday, Sept. 29, at 9 am, Owen Stephens will demo supplementary properties and term filter builder functions used in Agreements with folks who are using the functions sharing how they use them, etc.
- Reminder - App Interaction survey UI for Save button open thru 9/19/23 - your input appreciated!
- Next scheduled meeting - next Tuesday (9/19) at 1 pm Eastern
Tuesday, September 12, 2023

Housekeeping -

- Next meeting, this Friday (9/15) at 9 am Eastern
- Part 2 of Package POLs with Sara Colglazier tentatively planned for Tuesday, Sept. 26
- Please participate App Interaction survey re: UI for Save button (deadline - 9/19/23) if possible. Thank you!
- Implementers Topic #96 discussion planned for next Tuesday (9/19)
- Discussing donors will be on the agenda for this Friday (9/15)

Business -

- Discuss claiming workflow (Dennis)

Notes: 2023-09-12 Acquisitions Meeting notes

Recording: 2023-09-12

Friday, September 1, 2023

Housekeeping -

- Next scheduled meeting - Tues. 9/5, at 1 pm Eastern
- A Wiki page created re: discussions in the last meeting (August 29) about Acq SIG meetings & improvement. See wiki

PC Update (Kristin Martin) -

(FOLIO wiki wasn't working during meeting time that day)

Business -

- Package POLs with Sara Colglazier

Notes:

Recording: 2023-09-01 Recording Package pol's
**Tuesday, August 29, 2023**

**Housekeeping -**
- Next meeting, Friday, Sept. 1 at 9 am Eastern - Package POLs with Sara Colglazier
- Friday, Sept. 29, at 9 am Eastern - Owen Stephens will demo supplementary properties & term filter builder functions used in Agreements & real life application of the function shared by some institutions

**Business -**
- Feedback re: WOLFCon 2023 from in person and virtual attendees
- Discussed structure of Acquisitions SIG meetings & ways to improve
- Answered questions Dennis had regarding managing donor information in FOLIO
- If time permits, discuss [Implementers Topics](#) (continue discussing #108 Kimberly Pamplin which started in the last meeting?!, #110 Sven Thomsen) – didn’t happen

**Notes:** 2023-08-29 Acquisitions Meeting notes

**Recording:** 2023-08-29

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**Tuesday, August 22, 2023**

*(meeting cancelled - conflict to WOLFCon 2023)*

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**Friday, August 18, 2023**

**Housekeeping -**
- Reminder - no meeting next week (WOLFCon 2023, 8/22-8/24, see August 8 meeting agenda for Acquisitions related WOLFCon sessions)
- Being planned - Discuss Package POLs with Sara Colglazier, tentatively planned for Sept. 1
- Being planned - Demo of how supplementary properties and term filter builder are used in ERM by Own Stephens & real life application implementation in an upcoming Friday meeting after WOLFCon (currently looking at Friday, Sept. 15 or Sept. 29)

**PC Updates** *(Kristin Martin)*
- Planning for WOLFcon over past two weeks; no further updates

**Business -**
- Dennis has questions and would like to learn more about claiming scenarios your institution might have (ex. claim one thing from a given title vs. multiple things for a given title, etc.) - please invite colleagues who handle claiming but may not attend Acq SIG on regular basis if available
- If time allows, continue discussing [Implementers Topics](#) (#107 Daniel Huang, #108 Kimberly Pamplin, #110 Sven Thomsen) – only got #107

**Notes:** 2023-08-18 Acquisitions Meeting notes

**Recording:** 2023-08-18

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**Tuesday, August 15, 2023**

**Housekeeping -**
- Reminder - Tuesday, August 22, meeting cancelled due to conflict to WOLFCon 2023
- Next scheduled meeting - This Friday, August 18, at 9 am Eastern
- Tentatively planned for Friday, Sept. 1 - Package POLs with Sara Colglazier

**Business -**
- Discuss [Implementers Topics](#)
  - #96 Add option to indicate fund on a preset, not pro-rated adjustment (skipped)
  - #103 Invoices: No duplicate warning when set to Approve/Pay
  - #104 Navigating invoice lines
  - #105 Orders Search for POLs in search and filter pane via instance HRID
Tuesday, August 8, 2023

Housekeeping -

- Next meeting, Tuesday, August 15, at 1 pm Eastern
- WOLFCon 2023 (August 22-24) in Chicago - schedule available
- WOLFCon Acquisitions related sessions -
  - Tuesday (8/22)
    - 11:30 am CDT - Orders and Invoices: Import? Export? What to do?
    - 1:30 pm CDT - FOLIO fiscal year rollover state of the union
  - Wednesday (8/23)
    - 9 am CDT - Extending receiving capabilities - claiming, routing and binding / Serials: development progress and plannings
    - 3:30 pm CDT - MOBIUS and Extended Consortial Support for FOLIO / Consortium Workflows - Cost Sharing and Buying Clubs
  - Thursday (8/24)
    - 3:30 pm CDT - FOLIO Product Owner AMA (Ask Me Anything)

Business -

- Possibly discussing Implementers Topics - #99, 100, & 102

Notes: 2023-08-08 Acquisitions Meeting notes

Recording: 2023-08-08 Recording

Friday, August 4, 2023

(meeting cancelled - PO not available & no specific topics was suggested before meeting was cancelled)

Tuesday, August 1, 2023

Housekeeping -

- Expects a shorter meeting today as PO is only available for the first half of the meeting
- Seeking topics for this Friday’s meeting (August 4)

Business -

- Discuss Implementers Topics - #93 (Kristin Martin), #96 (Molly Driscoll Josh Roberts), #98 & #99 (Kristin Martin)

PC Update (Kristin Martin) -

- Mostly WOLFcon planning. Will be meeting F2F Friday, August 25.
- 2023-07-13 Product Council Meeting Notes
  - Review of critical service patch process
  - SIG liaisons updated
  - review of AWS costs (from TC)
- 2023-07-25 Product Council Meeting Notes
  - WOLFcon planning
  - Updates from councils and Support SIG tagging bugs

Notes: 2023-08-01 Acquisitions Meeting notes

Recording: 2023-08-01 Recording

Tuesday, July 25, 2023

(Meeting cancelled - PO can’t make it & no interest from the group to meet)
Friday, July 21, 2023

Housekeeping -

- August 22 (Tuesday) meeting cancelled - conflict to WOLFCon 2023
- PC Updates postponed (Kristin Martin is on vacation)
- Next meeting - Tuesday, July 25, at 1 pm Eastern

Business -

- Review "Do not include Inactive Fund, Budget or Expense class in GROUP summary"
- Review "Do not include Inactive Group, Fund or Budget in LEDGER summary"
- Review "Do not include Inactive Ledger, Group, Fund or Budget in FISCAL YEAR summary"

Notes: 2023-07-21 Acquisitions Meeting notes
Recording: 2023-07-21

Tuesday, July 18, 2023

Housekeeping -

- Next scheduled meeting - Friday, July 21, at 9 am Eastern
- Dennis has a conflict that he will miss the first half of today's meeting
- WOLFCon 2023 Schedule available
- WOLFCon 2023 information and registration - https://openlibraryfoundation.org/about/wolfcon/upcoming/
- FYI - Orchid Release Notes

Business -

- Open discussions for the first half of the meeting
  - Implementers' Topics - #81 (André Hohmann), #95 (Corrie Hutchinson), #96 (Molly Driscoll Josh Roberts)

Notes: 2023-07-18 Acquisitions Meeting notes
Recording: 2023-07-18 Recording

Tuesday, July 11, 2023

(Zoom call cancelled)

Friday, July 7, 2023

Housekeeping -

- Next meeting - July 11 @ 1 pm

PC Update (Kristin Martin) -

- 2023-06-29 Product Council Meeting notes
  - Report from the FOLIO Retreat in Chicago
  - Desire to work with SIGs better on prioritization and better understanding of desired features and upcoming features
  - Working with Community Council and Technical Council to define a FOLIO Developer Advocate to help support developers who may be working independently or new to FOLIO development
  - Elections and roles for PC - I'll continue to be the liaison to Acquisitions SIG. Still looking for new co-chair for PC

Business -

- FYRO updates from anyone who's recently done it or are getting ready to do it
  - Continue discussing Implementers Topics #91 & continues (Sven Thomsen Kristin Martin)

Notes: 2023-07-07 Acquisitions Meeting notes
Recording: 2023-07-07
Tuesday, July 4, 2023
(no meeting - 4th of July holiday)

Tuesday, June 27, 2023
Housekeeping -

- No meeting next Tuesday, 4th of July holiday
- Next scheduled meeting - Friday, July 7, at 9 am Eastern

Business -

- Discuss Implementers Topic (#91 Sven Thomsen, #93 Kristin Martin, #95 Unknown User (hutchinsonca@missouri.edu), ...)

Notes: 2023-06-27 Acquisitions Meeting notes
Recording: 2023-06-27 Recording

Friday, June 23, 2023
Housekeeping -

- Next meeting, Tuesday, 6/27, at 1 pm Eastern

PC Update (Kristin Martin) - No PC meeting June 22

2023-06-15 Product Council Minutes

- PC Approved Browser support statement: clarifies that while testing is done in Chrome, bugs in other browsers will be investigated
- Call for members: Workflow SIG charge (Martina Schildt to introduce)

Business -

- Discuss Implementers Topics, (Topic #92 & #94 were discussed)

Notes: 2023-06-23 Acquisitions Meeting notes
Recording: 2023-06-23 Recording

Tuesday, June 20, 2023
Housekeeping -

- Next scheduled meeting - this Friday, June 23, at 9 am Eastern
- WOLFcon 2023 registration and preliminary agenda available plus registration info. see - https://openlibraryfoundation.org/about/wolfcon/upcoming/
- Transition announcement from Julie Brannon

Business -

- Confirm the retrieving of Product IDs for POL is appropriate
- MODORDERS-898 - Retrieve Product IDs from instance consistently when creating POL or changing connection of POL
- Review and discuss use cases for displaying piece information in discovery platforms
- UXPROD-3525 - Extend Piece "Receiving history" information from holdings display to public display

Notes: 2023-06-20 Acquisitions Meeting notes
Recording: 2023-06-20 Video
Tuesday, June 13, 2023

Housekeeping -

- Next meeting - Tuesday, June 20 at 1 pm Eastern
- WOLFcon 2023 proposal submission deadline extended to June 19 (more see submission form)
- A wiki page for sharing FYRO warning/error/failed/success messages was created - feedback welcomed

Business -

- FYRO update to share with group (if any)
- Discuss Acq SIG WOLFcon 2023 session(s) proposal submission (see brainstorming wiki for ideas we discussed earlier - WOLFcon 2023 Acq SIG brainstorming)
- Quick poll on WOLFcon 2023 - who will attend in person or virtually
- Confirm the retrieving of Product IDs for POL is appropriate
  
  ![MODORDERS-898](DRAFT) - Retrieve Product IDs from instance consistently when creating POL or changing connection of POL (didn't get to, postponed to the next meeting)
- Review and discuss use cases for displaying piece information in discovery platforms (didn't get to, postponed to the next meeting)

Notes: 2023-06-13 Acquisitions Meeting notes

Recording: 2023-06-13 Recording

Friday, June 9, 2023

Housekeeping -

- WOLFcon 2023 session proposal submission deadline extended thru Monday, June 19 - proposal form link here
- Early Bird registration deadline - June 18 (more info about WOLFcon 2023 check out this page here)

PC update (Kristin Martin) -

- Meeting 2023-06-01
  - Special meeting devoted to discussion of improvements to data import
  - Delay of Poppy until November 20 (previous release deadline for Quesnelia)
- Meeting 2023-06-08
  - Introduction and demo of new Lists App, for cross-app query solution
  - SIG updates

Business -

- Continue discussions/conversations regarding FYRO

Notes: 2023-06-09 Acquisitions Meeting notes

Recording: 2023-06-09 Video

Tuesday, June 6, 2023

Housekeeping -

- Next scheduled meeting, Friday (May 9 at 9 am), since both Dennis & Joe are away this week, we are looking for topics or interest in still meeting this Friday

Business -

- Test rollover demo/walk thru by Ann Crowley (Thank you, Ann!) plus Q&A
- What you do in FOLIO in preparation for FYRO - implementers’ FYRO experience sharing & Q&A

Notes: 2023-06-06 Acquisitions Meeting notes

Recording: 2023-06-06 video

Tuesday, May 30, 2023
Housekeeping -
- FYI - Orchid release launched today (May 30, 2023)
- Seeking topics/interest for meetings scheduled for June 6 (Tuesday) & June 9 (Friday)
- WOLFcon PC/SIG ideas google doc link (from Kristin Martin) - https://docs.google.com/spreadsheets/d/1ikt-9gFkQfZQl2CZpXq-HQ2PdybqDz8dGaJPG-y/edit#gid=0

Business -
- Continue WOLFcon 2023 proposal brainstorming for any other ideas the group may have
- Discuss Implementers Topic #91 (Sven Thomsen, André Hohmann) or #92 (Kimberly Pamplin, Okay Okonkwo) - didn't happen as meeting ended early

Notes: 2023-05-30 Acquisitions Meeting notes

Recording: 2023-05-30 video

Friday, May 26, 2023

Housekeeping -
- WOLFcon 2023 Acq SIG brainstorming wiki for proposal ideas
- Reminder - FOLIO Councils election voting (please vote by 5/29/23)
- Next meeting - Tuesday, May 30 at 1 pm Eastern
- Implementers SIG next Tuesday meeting at 11 am Eastern - topic FYRO

Business -
- WOLFCon 2023 brainstorming

Notes: 2023-05-26 Acquisitions Meeting notes

Recording: 2023-05-26 video

Tuesday, May 23, 2023

Housekeeping -
- Please read PC Update notes below from Kristin. Thank you!!
- Mark your calendar - WOLFCon 2023, August 22-24, The University of Chicago
- WOLFCon 2023 Proposal Form (proposal submission deadline - Monday, June 5, 2023)
- Next meeting, Friday, May 26, at 9 am Eastern

PC Update (Kristin Martin) -
- Don't forget to vote! Voting closes on May 29. Ballots sent to all interested community individuals by email. Reach out to Marko Knepper or Boaz Nadav-Manes if you can't find your ballot.
- Special Meeting on Data Import: June 1. All are invited. There are some background reading documents
- PC meeting 2023-05-04
  - Revisions to Release Management Stakeholders group to manage the critical service patch
    - New space on wiki
  - continuation of some previous groups
  - Aligning reality with expectations - what can the PC work on, and how could some additional funding help? Some ideas for PO coordinator or development coordinator
- PC meeting 2023-05-11
  - Review of new consortia functionality
  - Finalization of membership of Release Management Stakeholders

Business -
- Update from PO Team

Notes: 2023-05-23 Acquisitions Meeting notes

Recording: 2023-05-23 video
PO Team busy with consortia related functionalities for Q release & no interest expressed among SIG members to meet)

Friday, May 12, 2023

(Zoom call cancelled - PO Team busy with consortia related functionalities for Q release & no interest expressed among SIG members to meet)

Tuesday, May 9, 2023

(Zoom call cancelled - PO Team tied up with consortia related functionalities for Q release & no interest expressed among SIG members to meet)

PC Update (Kristin Martin) -

- 2023-04-20 Product Council Meeting
  - New terminology is accepted by PC and should be added to the docs.folio.org website
  - SIG updates! See the notes for what’s been happening. A highlight: Dennis has been doing some work with consortia and the User Management SIG.

- 2023-04-27 Product Council Meeting
  - PC approved a new UI for configuring the number-generator (part of ”service configuration” in the area of settings
  - Discussion around workflow support: we are going to form a new SIG to further explore and document features and user stories for development in this area. The development team is led by Texas A&M, and they are offering product owner support, and are interested in recruiting additional developers.
  - Discussion of ”expectations vs. reality” to help PC prioritize influencing the product as it does not direct the product or control resources.

Friday, April 28, 2023

(Meeting cancelled)

Tuesday, April 25, 2023

Housekeeping -

- Next scheduled meeting, this Friday (4/28), at 9 am Eastern
- Onboarding Group seeking capable hands (Martina Schildt)

Business -

- Revisit Implementer’s Topic #59 (Aaron Nerlin)
- Discuss Implementer’s Topics #74, #91, #92 ... (Aaron Nerlin Sven ThomsenKimberly Pamplin Okay Okonkwo)

Notes: 2023-04-25 Acquisitions Meeting notes

Recording: 2023-04-25 video

Tuesday, April 18, 2023
Housekeeping -

- Next scheduled meeting - Tuesday, April 25, at 1 pm Eastern
- FOLIO Councils Elections nomination form - deadline has been extended to Monday, April 24

Business -

- FOLIO Acquisitions Orchid Release Highlights
- Discuss record deletion questions

Notes: 2023-04-18 Acquisitions Meeting notes

Recording: 2023-04-18 video

Friday, April 14, 2023

Housekeeping -

- Next meeting, Tuesday, April 18, at 1 pm Eastern

PC update (Kristin Martin) -

- Elections for all councils!
  - Nominations are due by April 19, 2023 using this nomination form.
  - Criteria: be from a member institution. Each member institution may have only one person elected in a seat per Council.
  - Terms are two years. Individuals can serve for up to four consecutive terms

- WOLFCon in Chicago, August 22-24
  - Heather volunteered to serve on FOLIO liaison group, but other individuals interested in planning WOLFCon? Contact me!

- Tri-Council Meeting
  - Reviewed FOLIO Terminology document and Evaluation Process for New FOLIO Features

Business -

- Presentation by Amelia Sutton - "Showcase UMass' Batch Voucher Export Workflow" (Thank you Amelia Sutton !!)
- Review design updates for UXPROD-3256 - Allow user to process invoices against previous fiscal years CLOSED
- If there is still enough time left, we may continue discussing Implementers Topics (more on #90, or move on to #91, ...) – didn't happen

Notes: 2023-04-14 Acquisitions Meeting notes

Video: recording 2023-04-14

Tuesday, April 11, 2023

Housekeeping -

- Reminder - Amelia Sutton will showcase UMass' Batch Voucher Export Workflow - scheduled for our next meeting, Friday, March 14, at 9 am Eastern

Business -

- Discuss/review Implementers Topics #88 & continues (Sara Colglazier Molly Driscoll)

Notes: 2023-04-11 Acquisitions Meeting notes

Video: Recording 2023-04-11

Tuesday, April 4, 2023

Housekeeping -

- Next meeting, Tuesday, April 11, at 1 pm Eastern
Friday, March 31, 2023

Housekeeping -

• Next meeting, Tuesday, April 4 at 1 pm Eastern

Business -

• Discuss Implementers Topics (#75 Björn Muschall Martina Tumulla, #30 Julie Brannon & continue with #84 @John Banionis)

Notes: 2023-03-31 Acquisitions Meeting notes

Video: 2023-03-31 Recording

Tuesday, March 28, 2023

Housekeeping -

• Implementers Topic #75 to be discussed this coming Friday (March 31 at 9 am Eastern), also our next meeting
• Kristin Martin won't be able to attend this Friday's meeting hence PC update moved up to today's agenda

PC update (Kristin Martin) -

• Meeting 2023-03-23
  ◦ Update from the Prioritization and Roadmap Group - piloting new prioritization process with RA SIG, review of existing roadmap
  ◦ Prioritization process (from presentation in May)

Business -

• Martina Schildt presents "Requirements for claiming - claiming levels" | Claiming levels requirements analysis + proposal
• If time allows, Joe will lead discussion re: Implementers Topics #30 (Julie Brannon) – didn't get to this postponed to this Friday (3/31)

Notes: 2023-03-28 Acquisitions Meeting notes

Video: 2023-03-28 Recording

Tuesday, March 21, 2023

Housekeeping/announcement -

• Martina Schildt's presentation re: "Claiming levels requirements analysis" planned for Tuesday, March 28 at 1 pm Eastern
• Amelia Sutton will showcase UMass' Batch Voucher Export Workflow (planned for Friday, April 14 at 9 am Eastern)
• Appinteraction_crossapp will meet on March 22 from noon - 1 pm Eastern to discuss printing use cases, requirements and related UX/UI questions. The group is collecting printing use cases and requirements here.
• Next meeting - Tuesday, March 28, at 1 pm Eastern

Business -

• Review if any questions/thoughts regarding UIIN-2922 that was discussed last Tuesday (March 14) - please talk with your colleagues who are directly involved in the process if they don't attend ACQ SIG regularly. Thank you!!
• If time allows, continue discussing Implementers Topics (#84 and continues) – didn't happen

Notes: 2023-03-21 Acquisitions Meeting notes

Video: 2023-03-21

Friday, March 17, 2023

• Status of the acq-sig-topic stories and a quick update Dennis made to the implementers page
• Discuss/review Implementers Topics (#84 & #85 @John Banionis, #86 Sara Colglazier)

Notes: 2023-04-04 Acquisitions Meeting notes

Video: 2023-04-04 Recording
Housekeeping/announcement -

- U.S. daylight saving time started Sunday, March 12. Please check & adjust FOLIO meetings time on your calendar if applicable
- Orchid bugfest runs thru March 17, please participate if you can
- Next meeting - Tuesday, March 21, at 1 pm Eastern
- Martina Schild't presentation re: "Claiming levels requirements analysis" postponed until Tuesday, March 28
- Appinteraction_crossapp group will meet on March 22 from noon - 1 pm Eastern to discuss printing in FOLIO. The group is collecting printing use cases and requirements [here](#)
- Seeking a volunteer to take notes for today's meeting

PC update (Kristin Martin) -

- From [2023-03-16 meeting](#):
  - Revised FOLIO terminology being reviewed by councils, and will be added to wiki, docs if affirmatively approved.
  - Next Tri-Council meeting is on 4/13 - will look at Evaluation Process for New FOLIO Functionality
- [2023-03-09: SIG updates](#)

Business -

- Discuss Implementers Topics - starting with Topic #81 (André Hohmann) and then #83 (@John Banionis) and continues

Notes: [2023-03-17 Acquisitions Meeting notes](#)

Video: [2023-03-17 Recording](#)

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**Tuesday, March 14, 2023**

Housekeeping -

- Next meeting - Friday (3/17) at 9 am Eastern, we will be discussing Implementers Topic #81 plus Martina Schild't presentation - "Claiming levels requirements analysis"
- Appinteraction_crossapp group will meet on March 22 from noon - 1 pm Eastern to discuss printing in FOLIO. The group is collecting printing use cases and requirements [here](#)

Business -

- Joe Reimer will review how to participate Orchid Bugfest & claim test cases (ppt link [here](#))
- Discuss view acquisitions data permissions in Inventory (ex. the use of Acq Unit in Orders) - comments welcome in UIIN-2292
- Encourage attendees to claim a test case or two with the remaining time we have

Notes: [2023-03-14 Acquisitions Meeting notes](#)

Video: [2023-03-14 Recording](#)

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**Tuesday, March 7, 2023**

Housekeeping -

- Next meeting - Tuesday, 3/14/23 at 1 pm Eastern
- Orchid bugfest started March 6 and will run thru Friday, March 17, please participate if you can (reach out to Oleksandr Bashtynskyi via Slack if you encounter any issue bugfest Orchid)
- FYI - Friday, March 17 (9 am Eastern) - Discuss Implementers Topics #81; Topic #75 discussion is planned for Friday, March 31.

PC Updates (Kristin Martin) -

- Notes for meetings prior to March 23, 2023 are available [here](#).
  - Bugfest for Orchid is underway. You can find further Bugfest information [here](#) and the whole release timeline [here](#).
  - Oleksii is looking for assistance in preparing the Release Digest for Orchid and moving forward (see the release digest for Morning Glory [here](#)).
  - Some brainstorming on WOLFCon, at preliminary stages - but interested in any SIG thoughts.
  - Onboarding Group continuing to refine presentation and piloting it with small group; Khalilah Gambrell providing onboarding for new development team from the National Library of Australia.
  - Interesting in recruiting more assistant POs or full POs from the FOLIO community, like the work Aaron Neslin is doing with Dennis.
  - Prioritization and Roadmap Group plans to share some preliminary work around the end of this month. Still looking for a good pilot project for new prioritization tool.

Business -

- Presentation/Q&A - Chicago's Invoicing/Voucher Workflow (Huge thanks to Scott Perry!!)
- If we have time after Scott's presentation/Q&A, we may continue discussing Implementers Topics
Tuesday, February 28, 2023

Housekeeping -

- FYI - FOLIO Forum presentation (2/22/23), FOLIO Reporting in Practice (highly recommended - a great presentation!!)
- Friday, March 3 - Dennis is not available (on holiday)
- Tuesday, March 7 - Scott Perry will present Chicago's invoicing/voucher workflow

Business -

- ACQ SIG survey feedback & discussion
- Special thanks to Molly Driscoll who is working on "Getting Started":Tips & Tricks FOLIO wiki Guide (will be shared when available)

Notes: 2023-02-28 Acquisitions Meeting notes

Video: 2023-02-28 Recording

Tuesday, February 21, 2023

Housekeeping -

- Next meeting - Tuesday, Feb 28 at 1 pm Eastern

Business -

- Discuss Implementers Topics #83 and continues

Notes: 2023-02-21 Acquisitions Meeting notes

Video: 2023-02-21 Recording

Friday, February 17, 2023

(Cancelled)

Tuesday, February 14, 2023

(Cancelled - Product Owner away this week)

Tuesday, February 7, 2023

Housekeeping -

- Next meeting - Tuesday, Feb 14 at 1 pm Eastern
- Reminder - ACQ SIG Conveners survey opens thru Feb. 14

Business -

- Order Version History UAT Overview and Results (by Dennis Bridges)
• If time permits, discuss Implementers Topics #83 and continues (Molly Driscoll)

Notes: 2023-02-07 Acquisitions Meeting notes

Video: 2023-02-07 Recording

Friday, February 3, 2023

Housekeeping -

• Next meeting - Tuesday, Feb. 7 at 1 pm Eastern
• Reminder ACQ SIG survey open thru Feb. 14 - "Thank You" to those who have responded! We welcome any thoughts/feedback to help improve SIG experiences for all 😊

PC Updates (Kristin Martin) -

2023-01-26 Meeting notes

• Onboarding Working Group presentation - submit comments/questions about slides by next week Thursday, Feb. 9
• Still looking for more Product Owners

No meeting this week: Prioritization Process and Roadmap group underway. Still working on defining key terms in the FOLIO project. Onboarding Working Group continues.

Business -

• Presentation - FYRO requirements analysis of the German networks and their libraries (see wiki) (by Martina Schildt)

Notes: 2023-02-03 Acquisitions Meeting notes

Video: 2023-02-03 Recording

Tuesday, January 31, 2023

Housekeeping -

• Reminder: next meeting, Friday, Feb. 3 at 9 am Eastern, "FYRO presentation" by German networks
• ACQ SIG conveners survey

Business -

• Discuss Implementers Topics #80 and continues (Kristin Martin André Hohmann Martina Schildt)

Notes from meeting: 2023-01-31 Acquisitions Meeting notes

Video: 2023-01-31 Recording

Tuesday, January 24, 2023

Housekeeping -

• Reminder - Order History Functionality UAT opens thru Jan. 26. We appreciate your participation!!
• Invoices/vouchers workflow presentation/demo planning
• Next meeting - Tuesday, Jan. 31 at 1 pm Eastern

Business -

• Presentation – "Lehigh's Patron Driven Acquisitions JIRA workflow" (Big thanks to Daniel Huang & Maccabee Levine)
  • slides - Lehigh's Purchase Request platform - http://go.lehigh.edu/purchaserequest

Notes: 2023-01-24 Acquisitions Meeting notes

Video: 2023-01-24 Recording
**Tuesday, January 17, 2023**

**Housekeeping -**

- Reminder - order history functionality UAT opens Jan. 18 and will run thru Jan. 26 (details see Dennis’ post of Friday, Jan. 13 in Slack)
- Mark your calendar for next Tuesday, Jan. 24, at 1 pm - "Lehigh's Patron Driven Acquisitions JIRA workflow” presentation by Dan Huang and Maccabee Levine of Lehigh University (Daniel Huang Maccabee Levine)

**Business -**

- Order History Function UAT updates - if any unexpected delay happens, Dennis will communicate thru Slack
- Discuss Implementers’ Topics #76 and continues (Molly Driscoll Julie Brannon)

**Notes:** 2023-01-17 Acquisitions Meeting notes

**Video:** 2023-01-17 Recording

**Friday, January 13, 2023**

**Housekeeping -**

- Confirming Friday meetings schedule change
- Mark your calendar - FYRO presentation by German networks planned for Friday, Feb. 3, at 9 am Eastern
- Next scheduled meeting - Tuesday, Jan. 17, at 1 pm Eastern

**PC Updates (Kristin Martin) -**

- First Tri-Council meeting held 2022-01-13
  - Trying to define FOLIO terms
- Demo of translations app created by Knowledgeware on 2022-01-05
- Need to reconsider work for functional requirements for new FOLIO modules
- Roadmap/Prioritization group still getting underway - want to take SIG conversations take-aways to that group
- Onboarding Task Group will have update at the end of the month

**Business -**

- Order history functionality demo & discuss UAT (UAT will open from 1/18/23 thru 1/20/23)
- Discuss Implementers’ Topics #74 and continues (Aaron Neslin Julie Brannon Topic #77 after #74)

**Notes:** 2023-01-13 Acquisitions Meeting notes

**Video:** 2023-01-13 Recording

**Tuesday, January 10, 2023**

**Housekeeping -**

- Next scheduled meeting, Friday, Jan. 13 at 9 am Eastern

**Business -**

- Demo order version history progression and Q&A
- Revisit previously discussed “processing invoices against previous fiscal years” and clarification Q&A
- Discuss Implementers’ Topics #73 and continues

**Notes:** 2023-01-10 Acquisitions Meeting notes

**Video:** 2023-01-10 Recording

**Tuesday, January 3, 2023**

**Housekeeping -**

- Happy New Year 2023!
- Next meeting, Tuesday, Jan. 10 at 1 pm Eastern
- Mark your calendar, Jan. 27 (Friday, 9 am Eastern) German networks will present - Findings of their testing of FYRO functionality
Business -

- Desired Order Integrations page - Desired Order Integrations
- Discuss Implementers’ Topics #71 and continues (Scott Perry Sven Thomsen Julie Brannon)

Notes: 2023-01-03 Acquisitions Meeting notes

Video: 2023-01-03 Recording

(No meetings on Dec.20, Dec. 27 & Dec. 30 - holiday break. The first meeting in 2023 will be Tuesday, Jan. 3, at 1 pm Eastern)

Friday, December 16, 2022

Housekeeping -

- Today's is the last ACQ SIG meeting of 2022!
- First meeting in 2023 will be Jan. 3 (Tuesday) at 1 pm Eastern
- Happy Holidays!

PC Updates (Kristin Martin) -

- 2022-12-08 Product Council Meeting notes
  - SIG Updates
  - Presentation on SIG Conversations
- 2022-12-15 Product Council Meeting notes
  - Discussion around review of new modules
  - Future of FOLIO builds working group ending

Business -

- Discuss Implementers’ Topics #67 (continue from the last meeting?!) and continues (Julie Brannon Scott Perry)

Notes: 2022-12-16 Acquisitions Meeting notes

Tuesday, December 13, 2022

Housekeeping -

- Reminder - December holiday break - 12/19/2022 thru 12/30/22
- Last meeting in December - 12/16/22 at 9 am Eastern
- First scheduled meeting in 2023 - Tuesday, 1/3/23 at 1 pm Eastern
- The FOLIO Prioritization and Roadmap Group seeking community members to join the group, more info here (Martina Schildt)

Business -

- Discuss Implementers’ Topics #64 & continues (Kristin Martin Kimberly Pamplin Julie Brannon)

2022-12-13 Acquisitions Meeting notes

Tuesday, December 6, 2022

Housekeeping -

- Next meeting, Tuesday, 12/13
- Holiday break in December - confirmed in the meeting today that we'll cancel meetings scheduled for 12/20, 12/27 & 12/30 due to holidays

Business -

- Discuss Implementers’ Topics #62 & continues (Julie Brannon Martina Schildt Kristin Martin)

Notes: 2022-12-06 Acquisitions Meeting notes
**Friday, December 2, 2022**

**Housekeeping -**
- Next meeting, Tuesday (12/6/22) at 1 pm Eastern
- Reminder - looking for owners of Implementers Topics #58 & #70

**PC Updates** (Kristin Martin)
- Short update meeting on 2022-12-01
  - BugFest for Nolana is completed
  - Oleksandr Bashtynskyi taking over QA role from Anton Emeliov
  - New Module review process still collecting comments
  - Subgroup is categorizing SIG feedback
  - Roadmap work to get underway, still looking for volunteers

**Business -**
- Discuss Implementers' Topics #59 & continues (Martina Schildt Julie Brannon Sara Colglazier)

**Notes:** 2022-12-02 Acquisitions Meeting notes

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**Tuesday, November 29, 2022**

**Housekeeping -**
- Reminder - next scheduled meeting is this Friday, Dec. 2, at 9 am Eastern

**Business -**
- Discuss how long after an exporting orders via EDIFACT people would generally need to download that exact EDIFACT file (1 day, 3 days, 1 week, 1 month)? If you needed to rely on getting the file from FTP after 7 days would you choose not to use the EDIFACT order export?
- Discuss Implementers' Topics #55 and continues (Julie Brannon)

**Notes:** 2022-11-22 Acquisitions Meeting notes

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**Tuesday, November 22, 2022**

**Housekeeping -**
- Next scheduled meeting, Tuesday (11/29) at 1 pm
- Reminder - please respond to Owen's questions related to Serials Management posted in ACQ SIG slack channel on 11/18 when you get a chance if possible
- Have a Safe & Happy Thanksgiving!

**Business -**
- More discussion around the Order history functionality

**Notes:** 2022-11-22 Acquisitions Meeting notes

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**Friday, November 18, 2022**

**Housekeeping -**
- Reminder - next scheduled meeting, Tuesday, Nov. 22
- Reminder - Nolana Bugfest is still up ... please help out testing if you can

**PC Updates** (Kristin Martin)
- Call for participants for Roadmap and Prioritization group
- PC Meeting 2022-11-17
  - Will be reviewing SIG notes and coming up with action items
  - Approved new review process for new modules, will be discussed with TC and CC after Thanksgiving
  - Discussion of TC's thoughts on the recommendations of Data Sync Working Group

**Notes:** 2022-11-17 Acquisitions Meeting notes
PC Meeting 2022-11-10
  - SIG updates
PC Meeting 2022-11-03
  - New Onboarding Group getting started to help new FOLIO members
  - Call for support for the Documentation Technical Editor
  - Community Council is distilling results of “3 things” survey
PC Meeting 2022-10-27
  - Serials Management work (you’ll hear more about this!)
  - Updates from other councils

Business -

- “Serials Management in FOLIO” presentation (link to the slides) & feedback (Owen Stephens)

Notes: 2022-11-18 Acquisitions Meeting notes
Video recording Nov.18, 2022

Tuesday, November 15, 2022

(Meeting cancelled - PO on vacation)

Tuesday, November 8, 2022

Housekeeping -

- Reminder - Nolana Bugfest started Monday, Nov. 7, and runs thru Friday, Nov. 18
- Next scheduled meeting - Tuesday, Nov. 15, at 1 pm Eastern
- Folio Forum Group seeking a volunteer from ACQ SIG to attend Forum group meetings and discuss what's going in the ACQ SIG with the Folio Forum Group (Heather McMillan)

Business -

- Dennis will do a quick reminder on how to participate in Bugfest & Q&A – meeting will end early to encourage people using the remainder time to register (if needed) and start testing (thank you for participating in Bugfest!!)

Notes: 2022-11-08 Acquisitions Meeting notes
video recording Nov.8,2022

Friday, November 4, 2022

(meeting cancelled - PO schedule conflict with Charleston Conference)

Tuesday, November 1, 2022

Housekeeping -

- Seeking a volunteer to take notes for today’s meeting
- Next scheduled meeting this Friday, Nov. 4, at 9 am Eastern
- “Serials Management in FOLIO” presentation in PC meeting (Oct. 29) - presentation slides available thru google doc see link here, courtesy of Owen Stephens.

Business -

- Demo Morning Glory Release highlights
- Demo Nolana Release highlights

Notes: 2022-11-01 Acquisitions Meeting notes
Video recording Nov.1, 2022
**Tuesday, October 25, 2022**

Housekeeping - No meeting this Friday - next meeting is Tuesday, Nov. 1

Business -

- Continue "Sara’s Show & Tell: Packages Galore!" and Q&A from last Friday (by Sara Colglazier)
- If time allows, discuss Implementers' Topics #55 and continues (Julie Brannon)

Notes: 2022-10-25 Acquisitions Meeting Notes

Video recording Oct.25, 2022

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**Friday, October 21, 2022**

Housekeeping -

- Reminder - next meeting, Tuesday, Oct. 25, at 1 pm Eastern
- Collecting "show & tell" presentation topics that would be of interest or be helpful to your library/libraries’ workflow

PC Updates (Kristin Martin) -

- Product Council meeting 2022-10-13
  - SIG updates
  - We are revising the Roadmap; conversations have started
- Product Council meeting 2022-10-20
  - Most of time was on a Q&A with the FOLIO China community. You can find links to the original presentation, the Q&A slides, and notes with the PC meeting.

Business -

- "Sara’s Show & Tell: Packages Galore!" and Q&A -- Sara Colglazier

Video recording Oct.21, 2022

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**Tuesday, October 18, 2022**

Housekeeping -

- Reminder - next meeting this Friday, Oct. 21, at 9 am EST (learning about Package orders from Sara)
- FOLIO Documentation seeking volunteers for new roles - contact Alexis Manheim or Kirstin Kemner-Heek for details if interested
- Seeking volunteers to join a small group to work on requirements re: item state, see [UXPROD-1590 - Implement Process in the Three-Part Item State](#) and [UXPROD-1530 - Implement Needed for in the Three-Part Item State](#) (Erin Nettifee)

Business -

Cross App Workflow presentations and Q&A

- Create an online order POL when there is not an instance existed in the system by Heather McMillan and Therese Corte (2 different processes from two library's on campus)
- Bring in invoice data from Harrassowitz and process the invoice by Kimberly Pamplin

Video Recording Oct. 18, 2022

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**Tuesday, October 11, 2022**

Housekeeping -

- reminder - next week Zoom calls (presentations & show & tell planned) - 10/18 (Tuesday) & 10/21 (Friday)

Business -
- Continue the discussion regarding claiming phase 1 from Oct. 4 meeting
  (Björn Muschall Sven Thomsen)
- Review “Order history/change log” feature that was defined a while back

Notes: 2022-10-11 Acquisitions Meeting notes

Friday, October 7, 2022

Housekeeping -

- reminder - next meeting Tuesday, October 11
- collecting discussion topics/show & tell/presentation ideas for Friday, Oct. 21 meeting

PC Updates (Kristin Martin) -

- 2022-10-06 Meeting notes
  ○ Conversation around need for documentation coordinator. Contract for Marcia Borensztajn to end. Looking for support to take on role
    locally (CC will work on position description) or to extend contact
- 2022-09-29 Product Council Meeting notes
  ○ Updates from other councils, including work from Technical Council on the Architectural Blueprint, release information, and Treasurer’s
    report at Community Council
  ○ SIG conversations are underway

Notes: 2022-10-07 Acquisitions Meeting notes
Video link: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-10-07T08:55/

Tuesday, October 4, 2022

Housekeeping -

- Reminder next meeting Friday, 10/7
- October 18 (Tuesday) meeting will be demo/show and tell package orders by Sara Colglazier and WOLFCon 2022 presentation “Cross-app
  workflow” by Heather McMillan

Business -

- Look at a narrow scope for claiming phase 1 (Dennis, 30 mins or so)
- Order creation (Ann-Marie, 10 mins or so)
- If time allows, discuss Implementers’ Topics #55 and continues (Julie Brannon)

Notes: 2022-10-04 Acquisitions Meeting notes
Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-10-04T12:55/
Tuesday, September 27, 2022

Housekeeping -

- meetings during the week of October 17 (how best to use the meeting time scheduled for 10/18 and 10/21 as Dennis has project meetings conflict that week that he can't join us)

Business -

- Discuss "how are topics archived" re: ongoing discussion of improving ACQ SIG's "Implementers Topics" list
- If time allows, discuss Implementers' Topics #54 and continues (Sara Colglazier, Julie Brannon)

Notes: 2022-09-27 Acquisitions Meeting notes

Video Link: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-09-27T13:00/

Friday, September 23, 2022

Housekeeping - reminder next meeting - Tuesday, 9/27/22, at 1 pm Eastern Time

PC Updates (Kristin Martin) -

- 2022-09-15 Product Council Meeting notes
- 2022-09-22 Product Council Meeting notes
  - Both meetings focused on a debrief of issues raised at WOLFCon.
  - The Scope Criteria Group has concluded it's work and two new groups have been formed, as recommendations from that group. Happy to accept other volunteers to be on the groups.
    - Functional Criteria for Accepting Modules
    - Proposed Vision for Future FOLIO Builds
  - PC Members are performing a SIG review, and we will work with SIG conveners to schedule conversations with each SIG. Would like to make sure the PC is doing what it can to support the needs of the SIGS. Kristin will work with Dennis and Dung-Lan to schedule a time on the agenda for Acquisitions.
  - There will also be a revisit to the Roadmap, more information coming soon, but may be another volunteer opportunity
  - New quarterly cross-council meeting will occur, working with chairs of other councils to figure out process to make this happen
- Library of Congress plans to migrate to FOLIO

Business -

- Continue the discussion re: improving "Implementers Topics" list
- Discuss Implementers' Topics, starting with #48 Tiewei Liu - see Acquisitions/Resource Management Implementers

Notes: 2022-09-23 Acquisitions Meeting notes

Video link: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-09-23T08:55/

Tuesday, September 20, 2022

Housekeeping - reminder next meeting scheduled for this Friday (9/23/22) at 9 am

Business -

- Continue the discussion from last Tuesday re: improving "Implementers Topics" list
- Continue to discuss Implementers' Topics - see Acquisitions/Resource Management Implementers

Notes: 2022-09-20 Acquisitions Meeting notes

Video link: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-09-20T12:55/

Tuesday, September 13, 2022

Housekeeping - No meeting this Friday. Next meeting is 9/20 (next Tuesday)

Business -

- Discuss workflow of noting Implementers Topics status
- Discuss the display of EDIFACT export detail on PO and POL. The export history of a purchase order.
- Continue to discuss Implementers' Topics - see Acquisitions/Resource Management Implementers
Friday, September 9, 2022

Housekeeping -
- next meeting, Tuesday (9/13) at 1 pm
- If planning a conversation regarding FYRO experience/reflection/info sharing is still of interest within the group

PC Updates (Kristin Martin) -

Business -
- Continue to discuss Implementers’ Topics - see Acquisitions/Resource Management Implementers - We will start with topic #50 (Björn Muschall)

Notes: 2022-09-09 Acquisitions Meeting notes
Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-09-09T09:00/

Tuesday, September 6, 2022

Housekeeping -
- Reminder - we have a meeting scheduled for this Friday, 9/9, at 9 am

Business -
- Review WOLFCon Acquisitions session
- Continue to discuss Implementers Topics - see Acquisitions/Resource Management Implementers

Implementer topics discussed:
- no.50 - Invoice approve/pay with pending Order and no.54 Creating and filtering pieces

Notes: 2022-09-06 Acquisitions Meeting notes
Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-09-06T12:55/

Thursday, September 1, 2022 (9:30 am - 11 am, EST)
- WOLFCon 2022: Acquisitions in FOLIO session (Zoom link will be shared when it's available)
- Password for recordings is wolfcon-22
- Recording of Cross App meeting. Heather started off the discussion with a workflow example for when we (TAMU) adds a new title to FOLIO for Serials Acquisitions. https://recordings.openlibraryfoundation.org/olf/wcon-2022-medium-3-wednesday/2022-08-31T08:40/
- List of all recordings available right now. https://docs.google.com/document/d/1deqICFxIoMHDtxPRfIDMiPgYMYgY3CLJIOnt_WVo/edit

Tuesday, August 30, 2022
(meeting cancelled)

Friday, August 26, 2022
(meeting cancelled)

Tuesday, August 23, 2022
Housekeeping -

- Reminder - 8/26 (Friday) & 8/30 (Tuesday) meetings cancelled (preparation & traveling for WOLFCon 2022)
- WOLFCon Acquisitions session will take place, Sept. 1 (Thursday) from 9:30 am - 11 am Eastern Time. Zoom link will be shared when available

Business -

- Continue to discuss Implementers Topics - see Acquisitions/Resource Management Implementers

Notes: 2022-08-23 Acquisitions Meeting notes

Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-08-23T12:55/

Tuesday, August 16, 2022

Housekeeping -

- WOLFCon Acquisitions session will be held at 9:30 am - 11 am (EST) on Sept. 1 (Thursday). Zoom call link will be shared when it's available
- Reminder August 30 (Tuesday) meeting is cancelled to accommodate traveling for WOLFCon. How about August 26 (Friday) meeting?! Should we keep it?

Business -

- Review the summary and description of the WOLFCon Acquisitions session (Thank you, Dennis!!)
- Discuss Implementers Topics - list link here Acquisitions/Resource Management Implementers

Notes: 2022-08-16 Acquisitions Meeting notes

Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-08-16T13:00/

Friday, August 12, 2022

(Zoom call cancelled)

Tuesday, August 9, 2022

Housekeeping -

- Next scheduled meeting - this Friday, 8/12, at 9 am

Business -

- Discuss update order bib data from instance
- Discuss Implementers Topics - list link here Acquisitions/Resource Management Implementers

Notes: 2022-08-09 Acquisitions Meeting notes

Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-08-09T12:55/

Tuesday, August 2, 2022

(Zoom call cancelled - Bugfest need your help ... please use the time to help test untested cases if you can - Bug Fest R2 2022 Morning Glory Thank you!!)

Friday, July 29, 2022

(Zoom call cancelled - Dennis is away)
Tuesday, July 26, 2022

Housekeeping -

- reminder - next meeting this Friday (7/29) at 9 am EST

Business - focusing on Morning Glory Bugfest

- Dennis will demo how to login to test rails to claim test cases and how to complete one as show and tell
- Bring any questions you might have regarding bugfest that Dennis will help address
- If enough time left, the group can sign in (or sign up) test rails and claim a test case or two of your own 😊

Notes: 2022-07-26 Acquisitions Meeting notes

Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-07-26T13:00/

Tuesday, July 19, 2022

(Zoom call cancelled - please use the time to bugfest Morning Glory info and link here - Bugfest Morning Glory)

Friday, July 15, 2022

Housekeeping -

- Morning Glory Bug Fest starts next Monday (July 18) and will run for two weeks - more info see Bug Fest R2 2022 Morning Glory. Any question regarding Bug Fest or if you need a TestRail acct, please reach out to Anton Emelianov via Slack
- WOLFcon 2022 schedule and registration info - see WOLFcon 2022
- Planning of a FYRO reflection/experience sharing discussion in one of the upcoming ACQ SIG meetings

PC Updates (Kristin Martin) -

- 2022-07-07 Meeting notes
- 2022-07-14 Product Council/SIG UpdatesMeeting notes
  - Conversations around PC role for the FOLIO product/project and using WOLFCon to clarify role and set strategic goals for next year
  - New officers: Jesse Koennecke stepping down from co-chair, Alexis Manheim coming on as co-chair; Kristin Martin continuing as co-chair and Peter Murray as secretary
  - Interest from Implementers SIG as well for implemented institutions to share rollover experiences

Business -

- Discuss Implementers' Topics - see Acquisitions/Resource Management Implementers

Notes: 2022-07-15 Acquisitions Meeting notes


Tuesday, July 12, 2022

Housekeeping -

- Reminder - next meeting, Friday, July 15 (9 am Eastern)

Business -

- Review the "Rollover preview" design workflow
- Discuss Implementers' Topics - see Acquisitions/Resources Management Implementers

Notes: 2022-07-12 Acquisitions Meeting notes

Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-07-12T13:00/

Tuesday, July 5, 2022
Business -

- Discuss creating invoice lines from POLs with certain payment statuses
- Discuss the relationship between POL and invoice line fund distributions

Notes: 2022-07-05 Acquisitions Meeting notes
Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-07-05T12:55/

Friday, July 1, 2022

(meeting cancelled - July 1, Canada Day)

Tuesday, June 28, 2022

Housekeeping -

- Propose to cancel this Friday's meeting due to July 1, Canada Day

Business -

Review key features re:

- The ability to change instance connection of POL
- The ability to create Orders from Instance
- The ability to create invoices from Orders

Discuss Implementers' Topics - see Acquisitions/Resource Management Implementers

Notes: 2022-06-28 Acquisitions Meeting notes

Tuesday, June 21, 2022

Housekeeping -

- reminder - no meeting this Friday (6/24)

Business -

- Continue to discuss Creation of Orders via MARC Bibs (ppt link) (Ann-Marie Breaux & Dennis Bridges)

Notes: 2022-06-21 Acquisitions Meeting notes
Video Link: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-06-21T12:55/

Friday, June 17, 2022

Housekeeping -

- next meeting Tuesday (6/21) at 1 pm

PC Updates (@Kristin Martin) -

- 2022-06-16 Product Council Meeting notes
  - Updates from the Data Synchronization working group
- 2022-06-09 Meeting notes
  - SIG updates

Business -

- Discuss Using MARC Bibs and Data Import to create FOLIO POLs (Ann-Marie Breaux)
Tuesday, June 14, 2022

Housekeeping -
  • Reminder - WOLFcon 2022 (Wednesday, August 31 - Friday, Sept. 2), see list of possible ACQ SIG session topics for WOLFcon 2022

Business -
  • WOLFcon 2022 planning updates/Q&A (Martina Schildt)
  • Continue to discuss Allow user to generate requests from Order line

Notes: 2022-06-14 Acquisitions Meeting notes
Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-06-14T13:00/

Tuesday, June 7, 2022

Housekeeping -
  • No meeting this Friday, next meeting is Tuesday, June 14
  • Take a look at the power point slide presentation from the FOLIO Scope-Criteria Group that Kristin included in the PC updates below when you get a chance

PC Updates (@Kristin Martin) - postponed from previous cancelled meeting (written updates, as Kristin can't make it)
  • 2022-05-26 Product Council Meeting notes: written reports from the councils, no meeting held
  • 2022-06-02 Product Council Meeting notes
    ◦ Presentation from the FOLIO Scope-Criteria Group: if you have time, please look at the slide deck: https://docs.google.com/presentation/d/129QOWjtjHMIQA0BoD6ZgtM0kIUs0OYr_85s6ycqJ1xdaE/edit#slide=id.p1
    ◦ Collecting feedback through the end of next week:
      ▪ Do you like the workflow?
      ▪ Do you like the functional criteria?
      ▪ Do you like the new MoU for contributions?
      ▪ Do you think we are going in the right direction?
    ◦ Feedback can be supplied as comments in any of the documents, or given to Kristin

Business -
  • Finish the discussion regarding Process invoices against previous fiscal years
  • Discuss Allow user to generate requests from Order line

Notes: 2022-06-07 Acquisitions Meeting notes
Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-06-07T13:00/

Friday, June 3, 2022

(meeting cancelled)

Tuesday, May 31, 2022

Housekeeping -
  • Reminder – next meeting this Friday, June 3 (9 am Eastern)

Business -
  • Review Create invoice automatically from purchase order
• If time permits, discuss Process invoice against previous fiscal years

Notes: 2022-05-31 Acquisitions Meeting notes


Tuesday, May 24, 2022

Housekeeping -

• Reminder - Let Dennis know the approximate number of pieces (for expected pieces not received or for pieces received) that your library may export from Receiving at one time (post in ACQ SIG slack channel will do)
• Reminder - Post any Acquisitions related topics you might have for discussion (if it's not already on) to the Implementers Topics list

Business -

• Discuss use cases for Create invoice automatically from purchase order

Notes: 2022-05-24 Acquisitions Meeting notes


Friday, May 20, 2022

Housekeeping -

PC Updates (@ Kristin Martin) -

• 2022-05-12 Product Council Meeting notes
  ◦ SIG updates and discussion of Marshall Breeding paper
• 2022-05-19 Product Council Meeting notes
  ◦ Prioritization process working group update

Business/Implementers' Topics -

• Implementers Topics (15 mins) – see Acquisitions/Resource Management implementers
• Discuss use cases for allowing user to export pieces from receiving
• Discuss use cases for Create invoice automatically from purchase order

2022-05-20 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-05-20T08:55/

Tuesday, May 17, 2022

Housekeeping -

• We have a meeting scheduled for this Friday, May 20 (9 am Eastern)

Business -

• Discuss the need for a fiscal year rollover preview
• Discuss use cases for allowing user to export pieces from receiving
• Discuss use cases for Create invoice automatically from purchase order

2022-05-17 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-05-17T12:55/

Tuesday, May 10, 2022

Housekeeping -
• Reminder - UAT for ACQ record export is open thru Thursday, May 12, your participation is greatly appreciated!! Details on how to participate see - https://folio-project.slack.com/archives/C217N937A/p1652109079190619

Business -
• Continue to discuss creating orders from inventory records
• Discuss exporting piece records from receiving
• If time permits, discuss a topic(s) from Implementers Topics list see Acquisitions/Resource Management implementers

2022-05-10 Acquisitions Meeting notes

Friday, May 6, 2022

Housekeeping -
• Reminder - Please participate UAT for batch voucher and invoice export which will run thru next Thursday, May 12. Details see Dennis’ instructions here - https://folio-project.slack.com/archives/C217N937A/p1651614070689709

PC Updates (Kristin Martin)
• PC meeting updates: 2022-04-28 Product Council Meeting notes

Business/Implementers' Topics -
• Discuss the creation of Orders from inventory records
• Discuss the exporting of piece records from receiving
• Continue the discussion from this Tuesday re: *process invoices against previous fiscal years
• Implementers Topics -- last time we were at #38 on the list -- see Implementers Topics list for more details - Acquisitions/Resource Management implementers

2022-05-06 Acquisitions Meeting notes
Video recording: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-05-06T08:55/

Tuesday, May 3, 2022

Housekeeping -
• Please participate UAT for batch voucher and invoice export when it’s ready
• Next meeting - Friday (5/6/22) at 9 am Eastern

Business -
• Continue the discussion around "process invoices against previous fiscal years"
• Feedback/Q&A re: WolfCon 2022 ACQ SIG brainstorming

2022-05-03 Acquisitions Meeting notes
Video recording: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-05-03T13:00/

Tuesday, April 26, 2022

Housekeeping -
• Feedback regarding question from App Interaction SIG - "Is there any desire or need to have field-based permissions?" (posted in ACQ SIG slack channel on 4/25/22)

Business -
• Share fiscal year rollover experiences (Big thanks to Greg Hutton!!)
• If time permits, continue the discussion around "process invoices against previous fiscal years"

2022-04-26 Acquisitions Meeting notes
Friday, April 22, 2022

Housekeeping -

- Reminder - please review and provide feedback re: Allow user to process invoices against previous fiscal years if possible

PC Updates (Kristin Martin )

(PC had been on spring break for two weeks that nothing new from PC to report since the last updates done two weeks ago)

Business/Implementers' Topics -

- Implementers Topics – continue to discuss #38 if needed or move on to #39 -- see Implementers Topics list for more details - Acquisitions /Resource Management implementers

2022-04-22 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-04-22T09:00/

Tuesday, April 19, 2022

Housekeeping -

- Fiscal year rollover discussion session is planned for next Tuesday, April 26
- Reminder - review and provide feedback re: Allow user to process invoices against previous fiscal years if applicable/relevant to your library

Business -

- Continue discussing "POL & Inventory matching" (please bring any cases or issues you've experienced to share with PO and Developers for continuous refining or updating the functions)
- Demo new export (invoices & fund information) functionality

2022-04-19 Acquisitions Meeting notes

Tuesday, April 12, 2022

Housekeeping -

- No meeting this coming Friday
- Seeking speakers to share fiscal year rollover experiences

Business/Implementers Topics -

- Implementers Topics - discuss #38 "POL & Inventory matching" & continues – see Acquisitions/Resource Management implementers for more details

2022-04-12 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-04-12T12:55/

Friday, April 8, 2022

Housekeeping

- Topic in the planning – Fiscal Year Rollover (forthcoming)

PC Updates (Kristin Martin ) - written only, away today

- No PC meeting April 14 or April 21 - Happy Spring Break!
- SIG Updates 2022-04-07
  - Still looking for members for Support SIG, meet Monday at 10 AM ET. It would be great to get some implemented institutions or Acquisitions experts there
  - need interim convener for MM SIG this summer
Discussion on the need to support implemented libraries during FOLIO upgrades, but ran out of time for larger discussion.

- WOLFCon - what ideas do you have? Looking to get more details than just brainstorming at this point. How can we take advantage of an in-person/hybrid all-hands meeting?
- Looking for dedicated individuals to help plan. See slack channel: #folio-wolfcon-planning-group

- **2022-03-31 Product Council Meeting notes**
  - Update from the Priorities for FOLIO Development subgroup
  - See the full prioritization process and leave comments [here](#)
  - This would replace the system of institutional rankings in Jira

**Business/Implementer’s Topics**

- Video working group – updates & plan
- Quick demo of invoice/fund/budget/voucher export that will be available in Morning Glory, UAT tests for those will be available soon
- Implementer’s Topics - discuss #33 and continues if time permits -- see Implementer’s Topics list for more details - [Acquisitions/Resource Management implementers](#)

**2022-04-08 Acquisitions Meeting notes**

[https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-04-08T08:55/](https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-04-08T08:55/)

**Tuesday, April 5, 2022**

(meeting cancelled)

**Tuesday, March 29, 2022**

**Housekeeping** - no meeting this Friday (4/1/22)

**Business**

- Discuss Kiwi migration

**Implementers Topics**

- Discuss from where we left off the last time – starting with Topic #33? Details see [Acquisitions/Resource Management implementers](#)

**2022-03-29 Acquisitions Meeting notes**


**Friday, March 25, 2022**

**Housekeeping** -

- Reminder - Implementer’s list for posting Acquisitions related topics for discussion

**PC Updates (Kristin Martin)**

- PC Meeting: [2022-03-24 Product Council Meeting Notes](#)
  - Updated to Capacity planning

**Business/Implementer’s Topics**

- Video tutorials group – additional participants needed to help identify a list of short tutorial videos of key acquisitions functions. Your time and efforts spent could make a difference to countless many others who will maneuver in Folio Acquisitions later!
- Continue to discuss "Ability to change the instance connection of a purchase order line" which started in the last meeting on 3/22/22
- Implementer’s Topics - discuss #33 and continues if time permits -- see Implementer’s Topics list for more details - [Acquisitions/Resource Management implementers](#)

**2022-03-25 Acquisitions Meeting notes**


**Tuesday, March 22, 2022**
Housekeeping -

- Reminder - Lotus Bugfest runs March 14 thru March 25. Please participate if you can!!
- Next meeting - Monday (3/21/22)

Business -

- Poll in slack channel about forming a small group to work on identifying a list of short tutorial videos of key acquisitions related functions.
- Continue to discuss export fund and budget information for ledger
- Discuss the exporting of invoice information

2022-03-22 Acquisitions Meeting notes

Tuesday, March 15, 2022

Housekeeping -

- Reminder - Lotus Bugfest runs March 14 thru March 25. Please participate if you can!!
  - Bugfest - Helpful Resources (see also what Dennis' post on slack channel last Friday, March 11)
- Next meeting - Tuesday (3/22/22)

Business -

- Discuss the creation of video content
- Demo of Univ. of Chicago request/notification workflow – Kristin Martin (Thank you, Kristin!!)
- Continue to discuss staff slips and workslips from last Friday's meeting - Generate a printable "Workslip" from order details
- Discuss export fund and budget information for ledger

2022-03-15 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-03-15T13:00/

Friday, March 11, 2022

Housekeeping -

- Reminder - Lotus Bugfest scheduled for March 14 - March 25. Please participate if you can!!
  - Bugfest training videos - Helpful Resources

PC Updates (Kristin Martin)

- 2022-03-10 Product Council Meeting notes/SIG Conveners Meeting
  - More to volunteer for BugFest

Business/Implemen'ter's Topics

- Demo - staff slips by Julie Bickle (LMU, FOLIO PM + PO Patron Notices and Staff Slips. Thank you, Julie!!)
- Discuss possible similar functions and data points between staff slips and previously discussed a printable "workslip" see https://wiki.folio.org/pages/viewpage.action?pageId=73535930 for more info. Robert Roose
- Implementer's Topics - discuss #33 and continues if time permits -- see Implementer's Topics list for more details - Acquisitions/Resource Management implementers

2022-03-11 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-03-11T09:00/

Tuesday, March 8, 2022

Housekeeping –

- Reminder - we'll meeting this Friday, March 11

Business –

- Discuss Manage Voucher Export without needing to access settings.
- Searching invoices by amount - should this be done by range instead?
• If time allows, continue to discuss topics on Implementer’s Topics list from where we left off on Feb. 25 - Acquisitions/Resource Management implementers

2022-03-08 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-03-08T13:00/

Tuesday, March 1, 2022
(meeting cancelled)

Friday, February 25, 2022

Housekeeping -
• No meeting next week (Feb. 28 – March 4)
• Next meeting, Tuesday, March 8 at 1 pm
• Acquisitions SIG wiki page update

PC Updates (Kristin Martin)
• Updates from Data Sync Working Group (they presented here too)
• Considering how to manage meetings and input across the global - new cross-council group investigating (Sharon Wiles-Young, Anya Arnold, Peter Murray, Mike Gorrell)
• Updates from the other councils
• documentation updates - now with versioning: https://iris.docs.folio.org/docs/

Business/Implementer’s Topics
• Discuss Implementer’s Topics starting #25 and continue as time allows - (#25 - #29 are invoice related topics) – details see Implementer’s Topics list - Acquisitions/Resource Management implementers

2022-02-25 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-02-25T08:55/

Tuesday, February 22, 2022

Housekeeping –
• Reminder - we’ll meeting this Friday, February 25
• Reminder - no meeting next Tuesday, March 1
• Both Acquisitions SIG Calendar and Community Calendars have been updated with our current Tuesday/Friday meeting schedule

Business –
• Summarize the discussion re: “exporting adjustment details in voucher summary” from last Tuesday
• Highlights of the Lotus release (10 minutes)
• Discuss #25 & #26 (and continue if time allows) both invoice related from Implementer’s topics list (details see the list - Acquisitions/Resource Management implementers)

2022-02-22 Acquisitions Meeting notes
https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-02-22T13:00/

Tuesday, February 15, 2022

Housekeeping -
• Friday meetings schedule update
• Cancel Tuesday March 1 meeting?! (Dennis is away that week)

Business -
• Discuss Implementers Topics #23 and #24 (link to Acquisitions/Resource Management implementers)
• Discuss exporting adjustment details in voucher summary
Tuesday, February 8, 2022

Housekeeping -

• reminder please respond to the poll regarding changing Friday meetings schedule if you haven't done so already

Business -

• Summary of MODFISTO-283 discussed last Friday
• Data sync questions re: the acceptable delay for data to be in sync across apps Martina Schildt
• Discuss the display of Item status in receiving - https://issues.folio.org/browse/UIREC-214
• Highlights of the Lotus release
• If time permits, discuss Implementer’s Topics #23 (carried over from last Friday’s meeting) see Implementers topic list link here - Acquisitions /Resource Management implementers

Friday, February 4, 2022

PC Update (Kristin Martin)

• 2022-01-27 Product Council Meeting notes
  ◦ Creation of Long-Term release postponed, return to discussion at the end of 2022
• 2022-02-03 Product Council Meeting notes
  ◦ Presentation on new authority control functionality
  ◦ Need for more product owners, helping to get developers integrated into project

Business -

• Continue to discuss Display "Rush" in receiving and on invoice - review UXPROD-3179
• Discuss if current over-encumbered is calculated as expected.

Implementer’s Topics (regular Friday topic)

#23 on the list - Invoices: voucher generation process feedback (see link below for Implementers Topics list)

Video recording: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-02-04T09:10/

Tuesday, February 1, 2022

Housekeeping -

• Please rank UXPROD-3435 - Export invoice data in delimited file format if possible particularly if this is a very important feature for your library
• Reminder - we are meeting this Friday, Feb 4, 2022 at 9 am EST

Business -

• Update on the EDIFACT order UAT (Dennis B.)
• Discuss use cases for deleting receiving records
Display "Rush" in receiving and on invoice - review UXPROD-3179

Carry POL 'rush' indicator to corresponding receiving records - REVIEW

2022-02-01 Acquisitions Meeting notes

Video: https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/2022-02-01T12:55/

Tuesday, January 25, 2022

Business -

- Continue to discuss review order/invoice export to csv requirements
- Discuss UXPROD-3525
  
  **UXPROD-3525** - Extend Piece "Receiving history" information from holdings display to public display

  Possible as it'd be very helpful to know how important this feature is for your library

  Please rank if possible

- Discuss another implementer topic from Acquisitions/Resource Management implementers list if time permits

2022-01-25 Acquisitions Meeting notes

Video recording: https://drive.google.com/drive/folders/1GGYd4-1kii43Q7jWRYFyhGZzR2M7G5Xy

Friday, January 21, 2022

PC Update (Kristin Martin)

2022-01-13 Product Council/SIG Conveners Meeting notes

- Review for SIG Conveners update
- New prioritization system under development

2022-01-20 Product Council Meeting Notes

- Action setting with SWOT analysis
- Finalizing Roadmap presentation and will want further input from SIGs

Business --

- Discuss MODINVOICE-328 - Allow editing of subscription dates after an invoice is paid
- How many of you will have more than 1000 pieces for a single title in receiving? https://issues.folio.org/browse/UIREC-191
  
  -- Describe use cases
  
  Review order/invoice export to csv requirements

2022-01-21 Acquisitions Meeting notes

Video: https://drive.google.com/drive/folders/1GGYd4-1kii43Q7jWRYFyhGZzR2M7G5Xy

Tuesday, January 18, 2022

Housekeeping

- Reminder - please participate if you can "EDIFACT order export UAT" (scheduled for 1/18/22 - 1/20/22)

Business

- EDIFACT (reserves 15 minutes Ann-Marie Breaux)
- CONTINUE to discuss allowing users to edit invoice subscription dates after the invoice is approved or paid

2022-01-18 Acquisitions Meeting notes

Tuesday, January 11, 2022

Housekeeping
Friday, January 7, 2022

Housekeeping

- Still seeking a new Convener in January 2022. As mentioned, we have a person who is tentatively willing, but would like others to have a chance to volunteer. If you are willing and able to volunteer, please contact Susan Martin, Heather McMillan, and Dennis Bridges no later than Friday, January 7, 2022 via direct message in Slack. If I do not receive any volunteers, I will see if our tentative person is still willing.

I (Susan) will be stepping down as convener. My last day will be January 25, 2022. I am seeking a person to be convener work with Heather and Dennis. Duties include (but may not be limited to) agenda wrangling and upkeep, meeting moderation, attending App Interaction SIG, and representing Acq SIG when necessary on the SIG conveners group and with PC. Heather is fabulous and is the co-convener. She takes care of the notes and provides assistance and back-up, as well as attending the other groups as well. Dennis is simply lovely to work with, and all and all it's a sweet gig, and a great way to give to the project.

Updates

PC Update (Kristin Martin : Just one PC meeting since the last Friday meeting: 2021-12-16 Product Council Meeting notes

- We are finalizing the Roadmap and need to update the wiki page with the new information
- Also reviewed the results of an implementer's SWOT Analysis

Implementer’s Topics

#22 on the list "Orders: Inconsistent terminology between filters, detail pane, and .csv export for "Date opened"" Julie Brannon

Acquisitions/Resource Management implementers

Business

- Follow up questions from Dennis Bridges regarding the discussion on additional use cases for canceling orders
- CONTINUE to discuss allowing users to edit invoice subscription dates after the invoice is approved or paid
- Discuss "Release encumbrances" for Ongoing orders

Tuesday, January 4, 2022

Housekeeping

- We will meet on Friday, January 7, 2022.
- Still seeking a new Convener in January 2022. As mentioned, we have a person who is tentatively willing, but would like others to have a chance to volunteer. If you are willing and able to volunteer, please contact me, Heather, and Dennis no later than Friday, January 7, 2022 via direct message in Slack. If I do not receive any volunteers, I will see if our tentative person is still willing.

I (Susan) will be stepping down as convener. My last day will be January 25, 2022. I am seeking a person to be convener work with Heather and Dennis. Duties include (but may not be limited to) agenda wrangling and upkeep, meeting moderation, attending App Interaction SIG, and representing Acq SIG when necessary on the SIG conveners group and with PC. Heather is fabulous and is the co-convener. She takes care of the notes and provides assistance and back-up, as well as attending the other groups as well. Dennis is simply lovely to work with, and all and all it's a sweet gig, and a great way to give to the project.

Business

- Discuss additional use cases for canceling orders
- Discuss "Release encumbrances" for Ongoing orders
- Discuss allowing users to edit invoice subscription dates after the invoice is approved or paid

Tuesday, December 28, 2021 - Canceled

Friday, December 24, 2021 - Canceled

Tuesday, December 21, 2021 - Canceled
Tuesday, December 14, 2021

Housekeeping

Seeking a new Convener in January 2022. I (Susan) will be stepping down as convener. My last day will be January 25, 2022. I am seeking a person to be convener work with Heather and Dennis. Duties include (but may not be limited to) agenda wrangling and upkeep, meeting moderation, attending App Interaction SIG, and representing Acq SIG when necessary on the SIG conveners group and with PC. Heather is fabulous and is the co-convener. She takes care of the notes and provides assistance and back-up, as well as attending the other groups as well. Dennis is simply lovely to work with, and all and all it’s a sweet gig, and a great way to give to the project.

If anyone is interested, please reach out to us. We also welcome questions about the position.

Topics

- Updated mocks or Display a history of edits for the order record
- Discussion around canceling orders. Are their use cases for "unc-canceling: an order or order line"

Friday, December 10, 2021

Housekeeping

Meeting schedule for the rest of 2021 - Last meeting of 2021 will be Tuesday, December 14th. We will resume our meetings on Tuesday, January 4, 2022.

Updates

- PC Updates: SIG update from 2021-12-09 meeting.
- New process for reviewing modules: PC review from a functional standpoint and then passes on to TC for review from technical side
- Need new Product Owners for the following areas
  - Loans, Check-in, Check-out, Loan information on Item Details (interim - Cheryl Malmborg)
  - Requests (interim - Brooks Travis)
  - Item State (interim - Charlotte Whitt)
  - Courses (interim - Charlotte Whitt)
- Support SIG is looking for more members! Check with Anya Arnold.

Implementers Topics (regular Friday topic)

We are going to go back and start covering the topic beginning with #14 and onward. We are allocating 30 minutes with a hard stop on these.

- #14 "Cover records" submitted by Sara Colglazier from the page.

Regular topics

- Updated mocks or Display a history of edits for the order record
- Discussion around canceling orders. Are their use cases for "unc-canceling: an order or order line?"

Tuesday, December 7, 2021

- Navigating Invoices discussion
- Updated mocks or Display a history of edits for the order record
- Discussion around canceling orders. Are their use cases for "unc-canceling: an order or order line?"

Tuesday, November 30, 2021

- EDIFACT invoice discussion - Ann-Marie
- Usability question regarding managing fund grouping from the group record

Tuesday, November 23, 2021

- WolfCon 2022 - Acq SIG discussion WolfCon 2022 Acq SIG brainstorming
- EDIFACT invoice discussion - Ann-Marie
- Should PO template show hide apply when viewing orders or just editing. Are there use cases for hiding the field during both view and edit?
- Usability question regarding managing fund grouping from the group record

Tuesday, November 16, 2021

- Smoke Testing for Kiwi
- WOLFCon 2022 - Acq SIG discussion (15 minutes)
- Presentation of handling of subscriptions using prediction patterns (Peter Sbrzesny and Martina Schildt)
Friday, November 12, 2021

Housekeeping

- Friday, November 26th meeting will be canceled due to the US Thanksgiving holiday.
- Survey on Acquisitions SIG management: please take some time to complete this survey regarding the Acquisitions SIG. Dennis, Heather, and Susan are interested in knowing your thoughts in order to improve. It should take about 15 minutes of time. The survey is set to close on 11/20/2021, so please do it this up-coming week! Thanks.
- The survey is available here: https://mtsu.ca1.qualtrics.com/jfe/form/SV_7VUuSkW7SL51w90 and was posted on the Slack channel as well.

Updates

- PC Update
  - Meeting notes 2021-11-04
  - Meeting notes 2021-11-11
  - Some new working groups
    - Criteria for Accepting Code
    - Community Input and Prioritization Working Group
  - SWOT Analysis for Implementers
  - WOLFCon 2022 - need for SIG input

Topics

- EDIFACT invoices and Kiwi (Ann-Marie) (20 minutes hard stop)
- Presentation of handling of subscriptions using prediction patterns (Peter Sbrzesny and Martina Schildt) 30 minutes or to the end of the hour

Implementers Topic (15 minutes hard stop - if there’s time)

- Topic #15 packages (submitted by Sara Colglazier).

Tuesday, November 9, 2021

- Review and confirm the details of displaying acquisition information on Item records. ☉ UXPROD-1995 - Item: Display of POL number, Order status, Order date and Price in the Acquisition accordion [IN REFINEMENT]
- Continue to review receiving enhancement mock-ups https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJqJTkUGlilbOw807_SZIQCyyx4MyVc/edit#slide=id.gf8b007a9f0_0_10
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor https://wiki.folio.org/pages/viewpage.action?pageId=73535001

Tuesday, November 2, 2021

- Review and confirm the details of displaying acquisition information on Item records. ☉ UXPROD-1995 - Item: Display of POL number, Order status, Order date and Price in the Acquisition accordion [CLOSED]
- Continue to review receiving enhancement mock-ups https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJqJTkUGlilbOw807_SZIQCyyx4MyVc/edit#slide=id.gf8b007a9f0_0_10
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor https://wiki.folio.org/pages/viewpage.action?pageId=73535001

Friday, October 29, 2021

Updates

- PC Update - 5 minutes
- Bulk Edit Update - 5 minutes
- EDIFACT invoices and Kiwi (Ann-Marie) - 20 minutes

Implementers Topics

We are going to go back and start covering the topic beginning with #14 and onward. We are allocating 15 minutes with a hard stop on these.

- #14 "Cover records" submitted by Sara Colglazier from the page.

Regular business

- Continue to review receiving enhancement mock-ups https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJqJTkUGlilbOw807_SZIQCyyx4MyVc/edit#slide=id.gf8b007a9f0_0_10
Tuesday, October 26, 2021

- EDIFACT related questions from the dev team
- Continue to review receiving enhancement mock-ups https://docs.google.com/presentation/d/1uMGr1_HsZyVzcJq_fTqUlbOmtfO07ySziGcyx4MdVc/edit#slide=id.f8a007a9f90_0_10
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor https://wiki.folio.org/pages/viewpage.action?pageId=73535001

Tuesday, October 19, 2021

- Continue to review receiving enhancement mock-ups https://docs.google.com/presentation/d/1uMGr1_HsZyVzcJq_fTqUlbOmtfO07ySziGcyx4MdVc/edit#slide=id.f8a007a9f90_0_10
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor https://wiki.folio.org/pages/viewpage.action?pageId=73535001

Friday, October 15, 2021

- PC Update
  - Meeting minutes 2021-10-14
  - Meeting minutes 2021-10-07
  - FOLIO Open Community Meeting
  - Volunteer for BugFest!
- "Workslip" functionality from notes - see Slack conversation from 9/22/2021 10:53 am and continuing
- Review receiving enhancement mock-ups
- Continue display acq information on instance conversation from Tuesday.
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor

Parking Lot Items

- Review and discuss "Date ordered" behavior when user unopen and reopen orders. Dennis will work on a story for the approval date that we can approve as a group. 8/24
- Discuss the ability to export country as name rather then code in the voucher export. Defer topic till December.
- Vouchers batch export question: I've noticed that Invoice Date is not included in the invoice voucher file generated by the batch export process. That data element is expected by Duke's AP system. A voucher date is included on the file, but the voucher date and invoice date will not likely be the same. https://wiki.folio.org/x/zgQGAg
- Discussion on the note app functionality in Acq

All Meeting Notes

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2021-03-23 Acquisitions Group Meeting Notes

The Acquisitions Group meets via Zoom every Tuesday 1-2pm Eastern U.S. time and every other Friday 9-10am Eastern U.S. time.

**TUESDAY MEETING ZOOM LINK**

Join from PC, Mac, Linux, iOS or Android: [https://zoom.us/j/353648867](https://zoom.us/j/353648867) Meeting ID: 353 648 867.

One tap mobile: +16468769923, 353648867# US (New York) +16699006833, 353648867# US (San Jose)

Dial by your location: +1 646 876 9923 US (New York) +1 669 900 6833 US (San Jose) or Find your local number: [https://zoom.us/u/adpH5ITcgX](https://zoom.us/u/adpH5ITcgX)

**FRIDAY MEETING ZOOM LINK**

Join from PC, Mac, Linux, iOS or Android: [https://zoom.us/j/675766727](https://zoom.us/j/675766727)

See [FOLIO meetings with Zoom](https://zoom.us/u/adpH5ITcgX) for more information on how to connect.

Or mobile phone one-tap (US Toll): +16465588656, 675766727# or +14086380968, 675766727#

Or Telephone:

Dial: +1 646 558 8656 (US Toll) or +1 408 638 0968 (US Toll)
Meeting ID: 675 766 727
International numbers available: [https://zoom.us/zoomconference?m=Uz8gOxV-yqHRNcWZKa4trK_0dP7WPlp](https://zoom.us/zoomconference?m=Uz8gOxV-yqHRNcWZKa4trK_0dP7WPlp)

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Find recordings of recent meetings on our Google Folder:

[https://drive.google.com/drive/folders/1QGv745JZipUrPqrRcœoQMNZ44roMPXK6](https://drive.google.com/drive/folders/1QGv745JZipUrPqrRcœoQMNZ44roMPXK6)

Notes for meetings prior to March 23, 2021 are available [here](#).

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**Up-Coming: Tuesday, October 19, 2021**

- EDIFACT invoices and Kiwi (Ann-Marie) - 20 minutes (hard stop)

**CURRENT: Friday, October 15, 2021**

- PC Update
  - Meeting minutes 2021-10-14
  - Meeting minutes 2021-10-07
  - FOLIO Open Community Meeting
  - Volunteer for BugFest!
- "Workslip" functionality from notes - see Slack conversation from 9/22/2021 10:53 am and continuing
- Review receiving enhancement mock-ups
- Continue display acq information on instance conversation from Tuesday.
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor

Tuesday, October 12, 2021
- Display acq information on instance
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor
- Discuss adding Acquisitions Method for category "free"

Tuesday, October 5, 2021
- Continue UAT Receiving results
- Display acq information on instance
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor
- Discuss adding Acquisitions Method for category "free"

Friday, October 1, 2021
- PC Update - Kristin Martin
  - Minutes from 2021-09-23 and 2021-09-30
- Continue UAT Receiving results
- Display acq information on instance
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor
- Discuss adding Acquisitions Method for category "free"

Tuesday, September 28, 2021
- UAT Receiving results
- "Workslip" functionality from notes - see Slack conversation from 9/22/2021 10:53am and continuing - NOT COVERED
- Question: Does it make to remove case sensitivity for acquisition units? Ie. should law, LAW or Law always be considered the same name?
- Continue Discussing renewal integration (Ongoing order information) - NOT COVERED

Tuesday, September 21, 2021
- Discuss displaying invoice line amount on POL instead of invoice amount (discussed in meeting)
- Discuss instance matching (discussed in meeting)
- Continue Discussing renewal integration (Ongoing order information)
- EDI Orders

Friday, September 17, 2021
- PC Update - 10 minutes Kristin M.
  - PC Meeting Minutes: 2021-09-09
  - PC Meeting Minutes: 2021-09-16
- Bulk Edit Presentation - 20-30 minutes Magda
- UAT Receiving Testing
- Order renewal integration (see Dennis's poll in the channel)
- EDI Orders

Tuesday, September 14, 2021 - CANCELED

Tuesday, September 7, 2021 - CANCELED

Friday, September 3, 2021

Housekeeping
- Tuesday, September 7, 202, 1pm Eastern time meeting is CANCELED

Updates
- PC Update 9/2 and PC Update 8/26 - Kristin Martin (10 minutes)

Business (some old and some new) Dennis (50 minutes)
- Upcoming Receiving UAT
- Discussion around this question: If we replace the piece "Caption" field with copy number, enumeration and chronology. Which of those new fields should be populated with your current piece Caption field information?
- EDI Orders (again)
Parking Lot Items

- EDI Orders
- Review and discuss "Date ordered" behavior when user unopen and reopen orders. Dennis will work on a story for the approval date that we can approve as a group. 8/24
- Discuss the ability to export country as name rather then code in the voucher export. Defer topic till December.
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