2019-10-04 Meeting notes

Date
04 Oct 2019

Attendees
- Kristin Martin
- Jack Mulvaney
- Kathleen Norton
- Ann-Marie Breaux
- William Verner
- Susan Martin
- Abigail Wickes
- Martina Schildt
- Martina Tumulla
- Julie Brannon
- Jennifer Eustis
- Nicole Trujillo
- Tim Whisenant
- Paul Trumble
- Sara Colglazier
- Owen Stephens
- Nancy Pelis
- Janet Ewing

Discussion items

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<th>Item</th>
<th>Who</th>
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<tr>
<td>Minute taker</td>
<td>Eric</td>
<td>Hartnett</td>
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<td>FOLIO updates</td>
<td>Kristin Martin</td>
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<td>* Product Council meeting minutes, from 10/3/2019*</td>
<td>Chalmers officially went live on Monday.</td>
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<td>PC asked for declarations of institutions who plan to go live in 2020. <a href="#">List is linked here.</a> Cornell just missed the deadline so aren't on the list.</td>
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<td>There's a need for new Product Owners. Harry Kaplanian presented a list of products that need owners. Could be 50% time. Many revolve around circulation and inventory. This could be an opportunity for someone with domain knowledge.</td>
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GOBI is integrated with a number of systems. FOLIO integration is based on OLE integration.

Starts with placing an order in GOBI (not having to do anything to copy order into FOLIO). GobiExpress Order screen is customized for the library. Select Subaccount, Fund Code, Location, Material Type (which is a field in the order), and enter initials. Tags do not correspond to tags in FOLIO but will. Once you hit the order button a new link is generated in the GOBI record for the book that indicates that there's an open order. This order is assigned a FOLIO number and the order is passed to FOLIO. Record is created in Orders app with data from GOBI. Acquisition Method defaults to "Purchase At Vendor System." Fund data is not yet working properly because the Finance app is still in development. At the same time the Order record is created, a "skinny" Inventory record is also created. In Settings-->OrdersInventory Interactions, you can assign how electronic, physical, and other formats are handled by default.

"On order" is listed in the Holdings section at the bottom of the Instance record.

"Need to work on better indication that an order is a rush in GOBI/FOLIO. Tags might be an option? When GOBI/FOLIO tag interaction is working, priority tag would appear in the PO line.

Receiving note from GOBI to FOLIO can be used appears at the top of the FOLIO record and can be used to indicate things like "do not stamp."

Field mappings are controlled through GobiSmart within GOBI. Post-MVP, the plan is to have mapping controlled in FOLIO as well.

Ann-Marie went through the technical details of the integration - see the recording.

If you want to connect GOBI to your institution's test instance of FOLIO, you would need to work with EBSCO on the setup. Ann-Marie will get back on where the documentation is on the technical side. Ann-Marie can help facilitate this.

The PO# that is sent from FOLIO to GOBI is added to the GOBI invoice.

If you place a second order for the same book for a second location, for example, a separate order record is created but based on the ISSN match, the title is added as a second holding in the Inventory record that was created by the first order.

When selecting a fund code in GOBI, if the fund code does not match up, GOBI tech support is alerted and will get in touch with you to resolve the problem.

Can you view a transaction log of activity? In Orders, you can view a list of everything ordered from GOBI today, for example, by filtering search results by vendor.

If working with a different ebook vendor, such as WT Cox, what kind of work would be needed? Messaging is in an XML format. The format is documented. In theory, they could also produce the JSON that is going into the Orders app but this might not be as easy as the XML. The tenant on the FOLIO side provides the API details. Harrassowitz has been in touch about it. Coutts should be able to do it but nobody's reached out. Ann-Marie suggests waiting until the Funds apps development is completed before reaching out to other vendors.

Work is still being done to put the data import pieces together. This includes a mapping UI. PubSub is some backend work on data import integration between apps - "which apps need this data, did it work/not work, etc."

A lot of work being done on validating ISBNs - this will demonstrated in the next Sprint.

**Action items**

- [ ]