# 2020-02-14 Resource Management Meeting Notes

## Date
12 Feb 2020

## Attendees
- Kristin Martin
- Susan Sheridan
- Unknown User (aneslin)
- Paul Trumble
- Julie Brannon
- Virginia Martin
- Jack Mulvaney
- Nancy Pelis
- Ann Crowley
- Virginia Martin
- Owen Stephens
- Nicole Trujillo
- Martina Schiltz
- Michael Arthur
- Nancy Pelis
- Janet Ewing
- Kathleen Norton
- Jay Campbell
- Abigail Wickes
- Sara Colglazier

## Discussion items

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<th>Item</th>
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<td>Minute taker?</td>
<td>Julie Brannon</td>
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| Announcements/PC update | Kristin Martin | Product Council:  
- Discussed MARC editing options. New PO Stephanie Buck has been assigned for lightweight MARC editing option until MARCCat is available  
- FOLIO Forum on 2/12 was about LDP |
| Library Data Platform (LDP) / Reporting: Looking for volunteer with Resource Management Expertise | Scott Perry | Looking for RM and ERM volunteers to help as SMEs or to help with prototyping reports or to write SQL.  
- Don't have as many RM people working on reports, so looking for more from RM knowledge area. Please contain Sharon Beltaine or join the LDP Users slack channel.  
- How long might the commitment last? Until the reports are written. ACRL and ARL queries are being worked on now.  
- Would volunteers need to attend meetings? Up to the volunteer - they could decide to just attend the small group.  
- Reporting SIG Home  
- Owen Stephens and Martina Tumulla volunteered  
- UMass "might" have folks in the future - we're hiring two positions in my unit at the moment who would be responsible for all our reporting We had some simultaneous retirements But we're still interviewing and I hesitate to volunteer unknown colleagues outright |
| Receiving: Packages, both print and electronic | Dennis Bridges, Owen Stephens | Picking up from last week's meeting to discuss handling packages. Dennis Bridges shared screen to review the discussion from the last meeting:  
- Ongoing order example of a renewal. You can indicate that the PO line is for a package of titles. No longer a 1 to 1 relationship between title and PO Line. We can now have a package name and can add some bibliographic info that will remain on the PO line (such as publisher)  
- When you indicate that the PO line is for a package of material we're assuming there are multiple titles within that package. The system will check the manual check-in box for you which will indicate that you are going to add titles for this package if there are things you want to receive.  
- You can identify locations, though don't have to. Dependent on the "create inventory" setting for the material type.  
**Example:** |

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Example:
Go to action - open order
Then once it's open, you can receive the order
But we have no titles for the package yet, so this is where the group discussed how would we receive packages for electronic materials and incorporate other applications (orders app is currently standalone). Maybe FOLIO in the future could retrieve the title for you from inventory, but for now you need to select from a title in inventory. You can either look it up or add it yourself (same as we do for a PO line).
We can still order pieces as we could before packages were introduced
- Can create an item for a piece or not - flexible
- Can receive pieces, add barcode etc.

DB: Are there additional questions based on this review of what we discussed last time?

- Virginia: Difficult to imagine from abstract demo rather than from specific examples.
  - Dennis suggested we could work through an example if you have one
  - This is always available in the testing environment if you want to play with it
  - Acquisitions small group had created examples previously
  - https://docs.google.com/spreadsheets/d/1NnWNE5UXBvJDyWL9pv1OERYcDwu6NyCWvHMe8gMxeM/edit#gid=0
  - Levant pack which contains 4 or 5 print journals that are ordered as a bundle. So if we created a Levant pack as a package would it exist in inventory?
    - You'd have a PO for Levant pack and add titles based on what's available inside the Levant pack.
    - You could import the title info via MARC records into inventory (rather than creating manually) in which case you'd be selecting instances from inventory as you add titles to the package.
    - So each title would have its own receiving? We wouldn't want issues from one title getting mixed up with another
  - **Levant** would be physical only for this example with 3 titles
    - Open order - one PO line for the Levant pack
    - Need to add title info to receive
    - Select the appropriate journal which connects this title to a PO line
    - Over time, you could have ordered this title on many different orders, so this title for this PO line is unique and has a number of pieces.
    - For ongoing orders, because you have just one order/order line you would have one title and receive against it for many years
    - Added more titles that are all journals - add pieces for what is expected with expected receipt date, location, and click Receive button.
    - How do we find what to receive?
      - They could search for the order and click Receive from the action menu. When you do that, it shows all the titles you purchased for that order
      - But when ABA journal arrives in the mail a student won't know that it's part of Levant pack. They'll have the title and ISSN at best. No problem - They can use either of those to search in the Receiving app
  - Migration question: Would you migrate your open order as a package? Yes
  - **Location question**: If you have multiple titles that go to multiple locations
    - One PO Line for the package
    - PO line could have no locations if you want
    - PO Line could have three different locations
So for each title, how do you know which location it's supposed to go to?

- You have location info when you add pieces during receiving
- Virginia Martin: But how do you know which location to select? How will a student worker know? They would be the ones doing the receiving. For each title, we need to indicate where it needs to go next. Might also relate to binding.
  - Dennis: This might need to go in receiving note - could have a type of note.
  - So we would have note schemes for how to handle each title?
  - Sara Colfrazier: What we need is to be able to designate that when I receive a piece that it goes to a location as a default. The create a piece popup should include where this title should go (location) based on the info we already entered when the order was created. This is so basic and students don't know this information
  - Kristin Martin: After you've received a piece you'll see the receiving history - will you see that issue 1 was sent to a specific location?
  - Owen: This is adding an expected piece. When does the piece get created? For a journal your ideal is that it's created automatically somehow - that you're not creating a piece manually each time. A student shouldn't be creating a piece, just receiving a piece.
- VM: Dennis had mentioned that there will eventually be prediction patterns
- SC: Patterns will create the pieces for the year - this saves lots of time. Not everyone is using patterns anymore because it's a pain so we do a lot of on the fly creating of pieces we care enough about to bind them eventually.
- VM: Duke would really like patterns functionality still
- KM: Need way to set the location as a default
- OS: Is there any reason why it doesn't currently default? DB: It did, but we changed it. Everyone has a different workflow for receiving pieces. It can come from the PO line but there is only one location for that type of material in the POL.
- SC: If I get 3 copies to send to 3 locations then I can create 3 POLs, one for each location.
- VM: Aren't we trying to avoid creating dummy records though?
- Kristen Wilson: In the receiving area when you create the new button could there be a default location button. The librarian could set it up initially.
- DB: How much detail do we want to make people add to receiving
- KW: Could it default to the location in inventory if there is one?
- DB: You could have an instance with multiple holdings, so you'd still have to select one. In Edelweiss the locations are restricted to the ones that are in the PO Line.
- KW: Traveling serials: Those often end up as narrative notes.
- We'd like to see more information on the receiving area. Want to see what has been claimed
- SC: Maybe we need to think about creating the item initially to a default location (stacks) and then during receiving there is a popup that says copy 1 goes to location x. Can the location of that piece that was assigned to a dummy location be altered to On Display?
- DB: Yes, on the POL you can add instructions as a receiving note which forces them to read it.
- KW: Complication might be coming from the package concept since within a package individual titles need their own location
- KM: If you receive an item and have that history displaying it will inform you about where prior pieces went and therefore the next one should go
- KW: Levant pack - is there a connection back to POL and cost information from the receiving app?
- yes
- OS in Chat: So I guess the question in my mind is whether the solution we need here is a way of pushing the piece to a location or finding a way to create the pieces easily (multiple at a single time)
- How can I see titles inside the order? You have the PO number and if there are titles for receiving you can see them filtered based on the POL.
Electronic packages - how would that work here? You may have a package POL that relates to an agreement in ERM that describes the content of a package. Let’s do an example:

- **DB:** Owen, Would that start in agreements?
- **KM:** Mini bundle - Regional Science
  1. Create a custom package in agreements with those two titles in there
     - Add title to basket, then add the next, create new agreement, add a start date, no end date needed
  2. Link it to an existing PO for the mini bundle which is a PO for a package of titles
  3. If look at the PO we aren't receiving this POL. How do we know these two titles are associated with this POL? We don’t - orders has no knowledge of agreements right now. There is a feature defined for this (navigating from orders to agreements). There will be a new accordion to display related agreement line which includes the title).
- **VM:** When you have your POL up from that view if it's a package you'll want to be able to see what print stuff is associated with it (from the agreements side for electronic and from receiving for print stuff). That’s the Holy Grail/
- **From order side it doesn’t show any individual titles**
- **Jack:** What about eHoldings. The agreement lines are there either way regardless of whether you’re using. Title level doesn’t display in agreements if we’re using eHoldings
- **OS:** If you did individual titles as agreement lines then you get the details, but if each agreement line is a package you don’t get the detail right there. The agreement lines can be packages OR titles. When looking to an external one (eHoldings) it’s too expensive (system-wise)
- **SC:** From orders
  - Navigating from orders to connected agreements: https://issues.folio.org/browse/UXPROD-2141
    - Mock-up at the end of this feature: Add related agreement lines accordion to the POL - https://issues.folio.org/browse/UIOR-445
    - SC: It would be helpful to add the Agreement Name (not just agreement line)
    - OS: Need to discuss this with Dennis since this mock-up may need to be corrected since this data is at the agreement level
    - SC: Will the agreement name and order name be the same? DG - don't have to be.
- We will continue this discussion next time working through more examples - see action items below

### Action items

- Identify realistic examples based on prior ones built for containers to walk through next time for. Use snaps
- P+E (Virginia). pmtrumble suggested in chat: College Art Association Basic membership can be ordered as P+E or Online only. Contains Art bulletin; and Art Journal
- Sara (family/mini-bundle - maybe one without inventory interaction and one with)
- Membership example