2022-10-25 Acquisitions Meeting Notes

Date
25 Oct 2022

Attendees
- Alissa Hafele, Dennis Bridges, Dung-Lan Chen, Dwayne Swigert, Emily Robertson, Jackie Magagnosc, Julia, Julie Stauffer, Kathleen Norton, Kimberly Pamplin, Kimberly Wiljanen, Linh Chang, Lisa Smith, Lucinda Williams, Martina Schildt, Mary Moran, Nancy Pelis, Okay Okonkwo, Peter Sbrzesny, Robert Heaton, Sara Colglazier, Scott Perry, Shannon Burke, Steve Selleck, Suzette Caneda, Sven Thomsen, Victoria Anderson, Winter White

Agenda

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)

Chat log: meeting_saved_chat.txt
Closed Caption: meeting_saved_closed_caption.txt

Discussion items

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<td>:02</td>
<td>Housekeeping</td>
<td>Dung-Lan</td>
<td>• Next meeting is Tuesday, Nov. 1.</td>
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### Sara’s Show & Tell: Packages Galore!

**Sara Colglazier**

- Review of what was discussed Friday.
- Experimental usages - may decide in the future to change as needed.
  - CSFs or AAFs for subscriptions to things with many Parts/Modules/Subunits Collections
  - User goes to one place and buys additional parts
    - E.g. - Early European Books - ProQuest Database
      - Purchased collections 1-10; then added 10, 11, etc.
      - Used to have separate POs for each thing. Now have consolidated onto one PO, but with multiple POLs to link to agreements.
      - First five POLs are paid on with different renewal dates.
      - Added one POL that is not paid on, but has link to inventory. - Is package checked.
  - Things with annual or regular additions
    - MIT Direct2Open - ebooks, annual.
    - Will link to agreement.
    - To show additional years will be based on invoice.
    - Will be a bit like the approvals, having a note in the invoice comments that indicates the year covered.
- ~ :23 - Approval Plan
  - Bug occurring where linked title lines do not display.
  - [UIOR-1027] - Link title MCL is showing blank rows
    - CLOSED
- ~ :26 - Analyzed / Cataloged Separately
  - Receiving through receiving app
  - Discussion of differences between Approval Plan & Analyzed / Cat Sep.
- ~ :30 - Unable to remove added package title
  - [UIOR-968] - Allow user to “Unlink” title from package POL view
    - IN REFINEMENT
- ~ :37 - Stretching boundaries of how FOLIO can be used. Is there an effective way that FOLIO could manage certain types of things if we add a couple of little additions?
- ~ :40 - Comes with / mini packages
  - Change over time (name, what is included, etc.)
  - Would like to be able to edit package name in POL as desired.
  - ISSN can be deleted on packages, but not added.
  - Discussion regarding unopening POs
- ~ :47 - P/E Mix
  - Discussion regarding use of the term “package”
  - Would be useful to be able to search on package titles in orders - Elastic Search?

### Upcoming Functionality

**Dennis Bridges**

- Review of what is coming in Nolana.
  - Just finalized functionality.
  - Could demo either or both Morning Glory and Nolana.
  - One more week to finalize functionality for Orchid.
  - May start with Morning Glory highlights in next meeting.

### Action items