Acquisitions/Resource Management implementers

Please add questions and topics here. Topics or questions posted in slack will be added here as well.

Resource Management /Acquisitions implementation topics, questions or issues

**Topic Status legend:**
- **OPEN** - To be discussed
- **BLOCKED** - The group is waiting for further information or some specific action to be completed before progress can continue
- **IN PROGRESS** - Discussion is ongoing and work is potentially in progress
- **CLOSED** - Discussion resolved and required actions completed

**How to contribute to other people's discussion topics:**
1. Do not add detail to closed or discussed topics as your comments may be overlooked. In this situation, it might be best to add your details as a new topic and reference the previous topic.
2. To contribute to an existing topic, add a new paragraph to the description column.
3. @mention yourself at the beginning of the paragraph

**How to indicate you are also interested in a topic:**
1. @mention yourself in the "Interested parties" column and add your institution name

**How are topics archived:**
When a topic status is set to closed by it's "Owner". The topic must also be moved to the "Acquisitions/Resource Management implementers Archive" page.
1. Copy the topic and paste it at the top of the Archived topics page that is nested under this page.
2. Delete the topic from this page

Showing 8 out of 49 issues

### Active Topics

<table>
<thead>
<tr>
<th>#</th>
<th>Topic</th>
<th>Status</th>
<th>Description/ use case</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Key**
- T - Type
- U - Update

**Topics**

- **UXPR OD-4589**
  - Submit Orders via automated email integration
  - Created: Dec 07, 2023
  - Updated: Dec 08, 2023

- **UXPR OD-4243**
  - Enable staff to change default Loan Type value for item when creating a PO Line
  - Created: May 24, 2022
  - Updated: Apr 24, 2023

- **UXPR OD-4185**
  - Settings: Define new configuration s for "Export to accounting" checkbox default values
  - Created: Apr 12, 2023
  - Updated: Nov 30, 2023

- **UXPR OD-4164**
  - Support OCIO Organization integration for Momentum
  - Created: Apr 04, 2023
  - Updated: Nov 30, 2023

- **UXPR OD-4121**
  - Link Order with existing item
  - Created: Mar 03, 2023
  - Updated: Nov 30, 2023

- **UXPR OD-4093**
  - Support for physical serial titles to be bound in ordering and receiving
  - Created: Feb 23, 2023
  - Updated: Dec 14, 2023

- **UXPR OD-4088**
  - Print routing list for physical pieces in receiving
  - Created: Feb 22, 2023
  - Updated: Dec 13, 2023

- **UXPR OD-4087**
  - Create Routing List for physical pieces in receiving
  - Created: Feb 22, 2023
  - Updated: Dec 08, 2023
The Duke Law Library uses functionality in Aleph to manage lists to route print journal subscription issues to faculty and staff. Do other institutions do this and if so, is development? This isn’t a high priority request, but it is functionality that exists in our current system.

GBV also using a similar function in their system. It is being used less and less just because many journals are available electronically.

Would it be possible to discuss design improvements for the "Export to accounting" checkbox? There are no templates available for Invoices to help guide users and is overlooked. If a user forgets/overlooks this checkbox for invoices that need to be sent to an external AP system how do they fix that mistake? Once the invoice is created and we need to cancel that invoice and create a new one in order to create a voucher for export to AP?

A preferred workflow could be to allow institutions to configure the default value of the "Export to accounting" checkbox in Settings > Invoices based on the Payment type since that typically drives whether an invoice is sent to an external AP system for payment processing or not. Example default settings below:

<table>
<thead>
<tr>
<th>Payment Type</th>
<th>&quot;Export to accounting&quot; checkbox default value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>True</td>
</tr>
<tr>
<td>Credit card</td>
<td>False</td>
</tr>
<tr>
<td>EFT</td>
<td>True</td>
</tr>
<tr>
<td>Deposit account</td>
<td>True</td>
</tr>
<tr>
<td>Physical check</td>
<td>True</td>
</tr>
<tr>
<td>Bank draft</td>
<td>True</td>
</tr>
<tr>
<td>Internal transfer</td>
<td>True</td>
</tr>
<tr>
<td>Other</td>
<td>True</td>
</tr>
</tbody>
</table>

Note added 1/14/22: There is an "Export to accounting" checkbox in Organizations >Vendor information section. The setting of this flag determines the default value that are concerned about missing this flag during invoice creation would be to turn it on for all vendors.

Our ERM staff at Duke have asked whether the Organization app Contact people "note" field could be added as a column on the detail pane. They don’t need to see identify which person in the Sales category, for instance, to contact for databases and stores other useful info about the contact. They’d prefer not to have extra clicks to open the full record for each contact to see that note, if possible.

Invoices: We’d expect the lock total checkbox to default as checked rather than unchecked. Would it be possible to make the default value configurable in Settings?
We are glad that the "Select order lines" process allows us to search for and select multiple POLs before clicking "Save" and we see the total number selected at the save. The user is likely to search by POL number, not by vendor since there would be too many results to scroll through. As they search one-by-one for each POL, they already selected and have the opportunity to unselect any mistakes before clicking "Save." The current flow leaves the user feeling unsure since they can't see which lines they've selected already.

Low-priority request: On the order and invoice could the vendor field be upgraded from static text of the vendor name to an active link so that the user can easily click linking is very helpful in other fields on the order such as the Fund, Title, and Related invoices.

The default value for the "Release encumbrance" checkbox is unchecked on the create vendor invoice line screen (which is used when the default value is "checked" since this could trip up users who don't check it and then have dangling encumbrances. The original thinking for leaving it unchecked was to ensure that ongoing orders didn't get automatically closed by the system. Now that we have the "Ongoing" order payment status and no longer have that issue maybe we could revisit this to set to "checked."
I am confused by what is displayed in the Place(s) field of the Related invoices for POLs. In my test example here, the pieces listed are not necessarily specific or related pieces created related to the POL, which is not helpful. I would rather see specific invoice LINE note info displayed, like: "Renewal. New subscription; Invoicing period: 2022-01-01 to 2022-12-31 (86-86)" in this case vendor provided and included in the EDI invoice, OR, something I manually enter like: 2022 Hathitrust Membership: Public Domain, versus, another Invoice line for: 2022 Hathitrust Membership: In-Copyright, each with their respective amounts, to help me understand what I just paid for.

At Chicago, we're continuing to struggle with identifier matches when creating POs. We want to be creating new instances in Inventory, but instead matches are occuring. This is on our test system (running Juniper). We are getting matches when the publisher provides an ISBN in the 024 or a publisher/distributor number in the 028. This is really common for Harrassowitz with music scores. If you want to see this in action, here's a short video: https://drive.google.com/file/d/1MOnMnF7u-RKb0pmFy80wulCjIfBmnwJ8/view?usp=sharing. One interim solution is to remove any identifiers (which is kind of a bummer, since these can be useful to identifying the material). Lotus will bring the ability to turn off identifier matching.

Orders will use all "Product identifier types". These match up to "Resource identifier types" in instance records:

- ASIN
- CODEN
- DOI
- ISBN
- ISSN
- Report Number
- Standard Technical report number
- URN

It would be good to discuss how we might want matching to work since the current process is way too broad.

Add a field for the mail address of a direct contact person to the cards in the accordion "contact information". If I need to contact an organization on e.g. shipments I rarely use general mail addresses but rather direct contact people.

Primary issue is understanding who to add as attention to when you are just sending a communication to an address. Address 1 and 2 are used for many things.

Alternative: use the categories for contact people in the same way as for the general contact information.
Would other institutions find it helpful to flag invoices that need special "pay immediately" handling by their AP system? At Duke, we sometimes need to process payment more quickly than the standard processing time and we need a way to communicate that in the voucher extract to alert AP staff. In our current system (Aleph), we use a defined string of text in a note field, but it would be preferable to have a distinct data element.

This would essentially be a rush flag for invoices that need to be paid more quickly than the standard Net 30. It doesn't specifically mean this needs to be paid in X number of days just that AP should not hold payment for any length of time.

No use cases that the group could think of for partial "Immediate payment"

Orders > add PO line: Why is the "Receipt date" an editable field when creating a new PO line? If the user enters a receipt date this could cause confusion since the there are use cases for editing this field during PO line creation, could it be changed to an inactive field on this form to avoid mistakes and confusion?

Screenshot to show that the "Receipt date" is editable on the Add PO line form:

![Screenshot showing the PO Line details window after saving a new PO line with the receipt date populated and Receipt status showing "Awaiting Receipt" since the order hasn't been received yet through the Receiving app.]

Also from Julie Brannon at Duke: The field labels are inconsistent between orders and invoices for these dates even though data flows from the order line to the invoice line. Is there a reason they're different, because if not, we should probably keep them consistent between apps:

Order line: Subscription from, Subscription to
Invoice line: Subscription start date, Subscription end date.

Control default values in Settings

Prompted by Slack discussion on 1/15/22. Request to control default values in settings. This relates to topics #24, #32, and #36 on this page. The ability to control libraries to align the UI with their needs and improve the user experience.

Eg. Checking the re-encumber checkbox. The library does a lot more orders that do not encumber and this was taking time and effort when creating orders. It can also be error-prone. Not using order templates for all orders.

Eg. In invoices, we consistently have to remember to check "Lock Total" and uncheck "check subscription overlap" for different orders.

Eg. Also need to remember to adjust "Export to accounting" checkbox and new Invoice line > "Release encumbrance".
Currently, an organization record can be deleted even if the organization is in use on other records. No warning is given to the user that the organization is linked to actions in FOLIO and could lead to unanticipated impacts if a user unknowingly deletes an organization that is in use elsewhere. After deletion of an organization, an order (for example) will display “Invalid reference” in the vendor code field.

The approvement/payment of an Invoice should not be allowed if the linked Order is pending since transactions will not behave as expected. Opening the Order after approval/paying creates new encumbrance transaction for current FY with values for “Awaiting payment resp. Expended” = $0.00 even though the Invoice is already processed. For this reason, the encumbrance/expended amount is not taken into account during FYRO. Right, it’s the wrong workflow. But a warning would definitely help to address this issue. For my liking I would prefer a modal warning when approving and paying an Invoice with pending Order (with options Cancel/Proceed). Or even more restrictive just present an error message and not let it happen. I would really appreciate a solution for that since it caused a lot of problems with us. Thanks for your consideration.

Addendum: After fixing transactions on database level and bringing it to the attention of colleagues, this workflow error occurs again and again.

Please contact Bjørn Muschall when this topic comes to agenda. Thanks!

When a user creates a new organization record and wants to add a new contact person or interface, the user needs to save the organization record first. In a second step, the user can then create and link the new contact person (or interface).

For a more fluent workflow with less clicking it would be helpful to be able to create a new contact or interface without needing to save the organization record first.
| **52** Receiving and closing POs | **IN PROGRESS** | Can we change the business logic for automatically closing POs so once a one-time PO has all POIs listed as “Fully Paid” the PO will close regardless of the Receipt where we have a lot of POs (around 5000) that are open and will re-enumber because we have paid in advance of receiving. We are going to have to manually close actually receiving. If there are use cases for wanting a PO to stay open, if paid, but not received, then can libraries be given the option to have paid POs closed regardless? |
| **53** POL able to be deleted off of OPEN One-Time Order | **IN PROGRESS** | [In Kiwi, hotfix 2] Is the following expected behavior? Scenario: I set up a One-Time Order, with one POL. Receiving Workflow: Sync... & Create inventory: Instance, with Marc as Source (previously imported to link Title to), a Holdings record, and an Item with Status OC. All good so far. ... Now I receive the item via the Receiving. now shows status In Process, and the Holdings shows the Receiving history and Acquisition info. Just as I want; great. ... Now I go to Check-in, and check-in the item the thing I am really asking about: I go back to the OPEN order record, then to the POL—Fully Received, but not Fully Paid at this point—and I am able to delete the the POL is gone, the Receiving record is gone, the Piece is gone, the Acquisitions and Receiving history info disappears from the Holdings record. ... The Item rema remains; but if On Order, it disappears. ... The Open PO also remains open, but has no POL, and so it a bit of a mystery thing. ... Once I have linked an Invoice (even Order. ... Still, this does not seem like good behavior to me. I can see if I Unopen the PO then I should be able to delete the POL, but NOT if it is Open. If there is some reason for being able to do this, then at the very least there needs to be a pop-up modal that asks me to confirm that I want to do delete the POL even if it is still open. |
| **54** Capturing binding information for order and receiving so records can be filtered by this data | **IN PROGRESS** | We would like to have a way of identifying Titles that represent material that will be sent for binding at a given point in the year—for example, in Receiving if there were a check box at the Receiving Title Record level for To be Bound or Take to Bindery. That one could then filter on. We now include information in the Receiving Note that indicates that the title is a Bindery title, but one cannot search on the Receiving Note to find this information. It would be better if what indicates that the title is a Bindery title could be seen and filtered on from both the POL and Receiving Title record. ... Something more like this |
| **57** Finance: Currency setting for fund | **IN PROGRESS** | Need to know a little more about how the user finds what needs to be bound and what historical information they need about this activity in receiving. |
| **58** Action performed on record bounces user to the top | **OPEN** | In invoices when you access an invoice line to review or edit and close out of the invoice line, it will bounce you back to the top of the invoice. **PLEASE ADD MORE INFORMATION AND INCLUDE YOUR NAME SO WE KNOW WHO TO ASK FOR DETAILS. THX!** |
| **59** Orders: Link to existing holding and item | **IN PROGRESS** | Add ability to link an order with an existing item (not only with an instance). |

Update 8/17/22: Duke's campus in China will operate using their own instance of FOLIO, so this question is no longer relevant for Duke.
Orders UI: For ongoing orders we usually have to scroll down while viewing the PO Details screen to see the title information since there is an additional accordion as accommodate seeing the PO line titles further up since titles are such a critical data element when looking at orders? Maybe this is more challenging for institutions I could be a valuable user experience improvement.

IN PROGRESS

The only way to remove Receiving titles is to delete the POL. With Package POLs you may need to clean up the receiving titles but not want to remove the POL.

IN PROGRESS

To speed up order template creation, it would be helpful to have these two options:

1. Duplicate an existing order template
   a. This is likely the most common while setting up or implementing FOLIO for the first time.
2. Create an order template based on a specific order (while viewing a specific order, the ability to set the default values for a new order template based on the values in the order).
   a. This might be more common/useful after using FOLIO for a while. Users realize they are making certain customizations to orders a lot and would like to:

   - When libraries withdraw and delete resources from the library system, they will delete items/holdings/instances in Inventory. The order and receiving record will stay in the system even if the item has been withdrawn. Some libraries may have originally ordered a specific version from Amazon as a rush. Circumstances change but user wants to keep the order history so it can be communicated to the requester. In this case the Receiving title would need to be removed and the more relevant instance connected.

   - Copies at textbook collection are heavily used and damaged and have to be replaced (by copies of the same or a later edition).
<table>
<thead>
<tr>
<th>ID</th>
<th>Description</th>
<th>Status</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>64</td>
<td>Receiving against closed POs.</td>
<td>IN PROGRESS</td>
<td>Prior to the end of our fiscal year, we closed all paid POs, so that they wouldn't re-encumber on rollover. Now we are receiving the pieces. For our monographs, this is order and receipt quantity and when the item is received, the POL Receipt Status does get updated to &quot;Fully Received&quot; and the PO remains closed. But for some items we coded them as &quot;Independent order and receipt quantity.&quot; Now staff are creating the piece(s) to be received and receiving it (them). This is creating two problems: 1.--to be received. 2.--the PO reopens (etc, etc, etc!) We can go to the POL edit and change the status to &quot;Fully Received&quot; and this will close the PO again, but we won't get another receipt. Dennis suggested on Slack: It's the change in status that triggers the PO workflow status to change. Perhaps the receipt status should not be updated when receiving &quot;Fully received&quot; which would close the order if it wasn't already closed. We like the second. We are using the &quot;Awaiting Receipt&quot; Status to track items to be received, Requirement: The PO does not reopen when receipt continues against a closed PO. This was found in Lotus. We believe it is the Adding and receiving of a new piece receipt status and opens the PO.</td>
</tr>
<tr>
<td>65</td>
<td>Add &quot;Created by&quot; filter to Invoices</td>
<td>IN PROGRESS</td>
<td>We do not currently use Acquisitions Units, but we do have several departments creating invoices (one-time vs. ongoing). Normally these are all approved by one person within each department. We are looking for a way to filter the invoices so that departmental approvers only see those invoices that are relevant to them. As there are just like in the orders app) would be of benefit. As an invoice approver, it would be beneficial to be able to filter invoices based on the ones I created. As an invoice approver, I approve invoices created by users in my department. Being able to sort by &quot;created by&quot; would allow me to focus on invoices I need to approve.</td>
</tr>
<tr>
<td>66</td>
<td>Order templates: View hidden fields while editing an order</td>
<td>CLOSED</td>
<td>Update 11/1/22: We can now see the Action menu option &quot;Show hidden fields&quot; while in edit mode, so this topic is resolved. Orders: In Lotus we can't view hidden fields while in Edit mode for an order that was created using a template that hides fields. We're concerned that if we hide a field we'll have a way to edit the value on the order.</td>
</tr>
<tr>
<td>67</td>
<td>Order templates: Hide tags</td>
<td>IN PROGRESS</td>
<td>We love the new hidden fields options in Settings &gt; Orders &gt; Order templates. We'd like to hide tags and wondered why the PO Tags and POL Tags aren't &quot;hideable&quot;. We'd like to hide tags and wondered why the PO Tags and POL Tags aren't &quot;hideable&quot;. Note: The tags functionality can be hidden completely across all of FOLIO if it is not needed in any application. Desire the ability to disable tags in the order and order line such that users are not able to apply them to orders. Tags are currently difficult to manage and we would like to clean up in the future.</td>
</tr>
<tr>
<td>68</td>
<td>Receiving: Don't display Receipt not required orders</td>
<td>IN PROGRESS</td>
<td>We're wondering why records display in the Receiving app for orders that are created with a Receipt status = &quot;Receipt not required&quot;? We're not seeing anything in the required order, so they wouldn't know from the Receiving app that this order was set to &quot;Receipt not required.&quot; Use cases for packages: - We also use packages for some print &quot;packages,&quot; but in those cases we do link the inventory records to the package. - Regarding packages, Mich State has asked for the linked POLS to display within the package. - We don't create inventory records for most electronic resource - Our Package POLs are what we use for Print Approval plans and others in the SC are for Gifts .... so not just for electronic resources</td>
</tr>
<tr>
<td>69</td>
<td>Orders: Configure whether material type is required</td>
<td>CLOSED</td>
<td>Orders: We'd like to make material type required for electronic order types so that users don't accidentally skip that field and it's important for tracking/reporting. Coi, institutions can decide whether to require material type based on order format (physical, electronic, P/E mix, other)? Capturing things like annual access fee for reporting purposes only clutter the &quot;Item material type&quot; list. We have discussed implementing a orders specific material type. If you see that as a more complete solution please comment on this Feature</td>
</tr>
<tr>
<td>70</td>
<td>Orders: API for third party vendors</td>
<td>CLOSED</td>
<td>We'd like to explore what other providers we could set up APIs for - specifically, Kanopy and Amazon.</td>
</tr>
<tr>
<td>71</td>
<td>Invoices: Display of fund not always available without scrolling to the right</td>
<td>IN PROGRESS</td>
<td>When approving invoices if the description is long I need to scroll right to view funds. Fair better would be to move the fund next to the PDL number or allow for cuCU The description is not something we want to completely remove. However, it can be unnecessarily long and could be truncated or wrapped at 30-50 characters. (gro) Allowing users to adjust the order of the columns would be another desirable solution if it persists at least for a session. Is. It is persisted as you move from one invoice to the next. Other Fields users are often scrolling to see. Total price, PO status.</td>
</tr>
<tr>
<td>72</td>
<td>Orders: warning before opening POL with unassigned funds</td>
<td>IN PROGRESS</td>
<td>It would be nice to have a warning coming up when you want to open a POL and there is still an amount remaining to be distributed in the fund distribution. The warning message could be something like: &quot;There is still an amount remaining to be distributed in the fund distribution.&quot; There are (probably) a few use cases where opening a POL like that makes sense, but I would assume that in most cases you might just forget to assign a fund to the order. User can forget to add a fund code even though they want to add one. Ultimately this is not identified until point of invoice and users need to go back and edit the PC. - Even when an order is created with a cost of 0 it can be important to include a Fund code. - For a gift order there is ultimately no cost at all and generally, it does not make sense to include a fund code for those orders.</td>
</tr>
<tr>
<td>ID</td>
<td>Issue Description</td>
<td>Status</td>
<td>Notes</td>
</tr>
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</tr>
</tbody>
</table>
| 73  | Display currency on Fiscal Year and Budget                                         | IN PROGRESS| Could we consider displaying the currency associated with a Fiscal year record and also display currency on the budget? Currently, we can only see the currency or odd behavior when the snapshot environment tenant currency was changed from USD to PLN.  
  - When she created a new POL, the currency was PLN -- this was expected based on the tenant currency.  
  - When she opened the order, the encumbrance was still reflected in USD with a converted value -- this was unexpected because the tenant currency was PLN.  
  - Dennis explained that “in some places on the order we show currency based on “currency setting” in tenant settings. However, transactions are converted based on the fiscal year currency is set based on the currency setting when the fiscal year is created.” When she looked at the JSON for the fiscal year, she could see that the fiscal year currency was EUR.  
  - Molly brought this to my attention to request that folio.dot.org documentation be updated to explain this expected behavior, but I think it would also help if users could help troubleshoot in the event that they change their default currency in Tenant > Settings. Currently, the currency value is displayed only at the Fund level. |
| 74  | Renewals integration (EBSCOCON ET)                                                | CLOSE      | Could Publish Cancellation Policy received from the EBSCOCONET Renewal Integration flow into the e-resource agreement line(s)?  
  - Here’s a typical cancellation policy: Cancellation Policy:  
    Cancellations not accepted after fifteen issues have been served |
| 75  | Add Accession number during receiving                                             | IN PROGRESS| An Accession number is not inappropriately assigned during the Receiving process. It would be helpful if the accession number could be entered during receiving and the context, we would also like to discuss the implementation of the number generator currently under development, which would also be valuable in Receiving.  
  - UXPROD-144 exists, however, this is linked to Inventory epic at the moment.  
  - Please inform Martina Tumula and Björn Muschall when topic will be discussed.  
  - DB Notes:  
    - Users are not searching in receiving based on accession number  
    - When receiving an item the receiver may need to add a suffix or make other decisions about editing the generated number for the related item  
    - The codes are generally built in a way that represents important pieces of information that can be reported on  
    - The length of accession numbers will vary but often they are around 13-16 digits  
    - Not just alphanumeric there can also be hyphens etc. |
| 76  | Delete connected item when piece is deleted from Receiving app                     | IN PROGRESS| When you delete a receiving record for a withdrawn periodical I would also like the option to delete the item record. As it is, I have to delete both separately and it is a lot of clicking. The receiving record says connected but it doesn’t delete.  
  - When deleting a piece in the receiving app it is possible that the user wants to remove item as well. Even when item is in a status other than “On-order” or “Order closed”  
  - For a certain journal the library might only keep issues from the current year. All have items for circulation and all would be deleted at the end of the appropriate year.  
  - The actual error message from inventory should be displayed to the user in receiving. Often times libraries will retain the existing holdings in this scenario but it would be nice to see a “delete connected item record and vice versa.”  
  - However, If there is an open request on an item the action should be prevented.  
  - I would like to have the choice of deleting a corresponding item, but I can see a time when we would want to delete pieces because of sheer quantity only, but would want to keep the connected item record. |
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| 79  | Receiving and Invoices: clicking on “Receive” from a POL can bring up more than one POL | IN PROGRESS| At Chicago, many POs were migrated from earlier systems, so some have very long PO numbers. When clicking on “Receive” from the drop down menu from the POL record. But the search is a keyword string, as opposed to an exact match. As a result, if the string of one POL number is contained in another POL number, this results in exact search to avoid confusion when trying to receive. Example video here: https://drive.google.com/file/d/1YOw9OH1FMFysaE91zIDrF6ebbFY1/4c8pXwz9lV/view?usp=sharing  
  - For a certain journal the library might only keep issues from the current year. All have items for circulation and all would be deleted at the end of the appropriate year.  
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  - However, If there is an open request on an item the action should be prevented.  
  - I would like to have the choice of deleting a corresponding item, but I can see a time when we would want to delete pieces because of sheer quantity only, but would want to keep the connected item record. |
| 79  | Receiving and Invoices: clicking on “Receive” from a POL can bring up more than one POL | IN PROGRESS| At Chicago, many POs were migrated from earlier systems, so some have very long PO numbers. When clicking on “Receive” from the drop down menu from the POL record. But the search is a keyword string, as opposed to an exact match. As a result, if the string of one POL number is contained in another POL number, this results in exact search to avoid confusion when trying to receive. Example video here: https://drive.google.com/file/d/1YOw9OH1FMFysaE91zIDrF6ebbFY1/4c8pXwz9lV/view?usp=sharing  
  - For a certain journal the library might only keep issues from the current year. All have items for circulation and all would be deleted at the end of the appropriate year.  
  - The actual error message from inventory should be displayed to the user in receiving. Often times libraries will retain the existing holdings in this scenario but it would be nice to see a “delete connected item record and vice versa.”  
  - However, If there is an open request on an item the action should be prevented.  
  - I would like to have the choice of deleting a corresponding item, but I can see a time when we would want to delete pieces because of sheer quantity only, but would want to keep the connected item record. |
| 80  | Provide comparable invoice line to invoice navigation as POL to PO navigation.     | IN PROGRESS| Recently, I went to look at an invoice in our Chicago Folio instance. Our Payments unit is scanning an uploading images directly in Folio (so awesome)! Under Lir Line # under “Related Invoice lines. This took me to the invoice line, but not the invoice. When on this page, it’s not immediately obvious how to actually view the full invoice (and for me, get to the attached scanned image). I went under the navigation.  
  - Line # under “Related Invoice lines. This took me to the invoice line, but not the invoice. When on this page, it’s not immediately obvious how to actually view the full invoice (and for me, get to the attached scanned image). I went under the navigation.  
  - Odd behavior when the snapshot environment tenant currency was changed from USD to PLN.  
  - MSU has also noticed this issue with voucher number.  
  - Also impacts adding POL to invoice  
  - User should be able to add a wildcard to number search if desired |

![Invoice Image](https://via.placeholder.com/150)
Enabling the deactivation of obsolete parameter values

At SLUB Dresden, obsolete parameter values are currently deactivated for users to avoid their use. However, the values should still be available for evaluations or administrative tasks. It is proposed that obsolete values of parameters can be deactivated in FOLIO.

It could be implemented, for example, by offering an "inactive" checkbox for each parameter value. The checkbox must be activated manually, to deactivate a value.

Please inform André Hohmann when the topic will be discussed.

- 06 Feb 2023:
  - Dennis: Would be nice to have a list of values users would like to deactivate. [2023-01-31 Acquisitions Meeting notes]
  - André Hohmann to Dennis Bridges:
    - Sorry that I did not attend the meeting. I found out too late, that the topic will be discussed.
    - It is not so easy to give a list of all values that should be activated. I therefore described the topic on the following wiki-page: Implementers Topic: understandable that we strive for a flexible solution.

Use cases:

- User creates a term for use with certain orders as a more appropriate term does not exist in the list of terms. After a few years the library decides to add additional relevant records would be given this term and the previously used term would be deprecated.
- User may search for records that contain a deprecated term in order to update them.
- When users are creating new records they should not be able to apply deprecated terms via the UI.
- Ideally it would be possible still to do this through the API as admin users may need to apply these terms when managing data. This may be for troubleshooting.
- User may need to reverse the deprecation of a term and continue to use it. The term might have been deprecated prematurely or by mistake. Or the library might change.

DB Notes:

- Proposing the addition of a status to all controlled vocabularies to allow users to remove them from select lists when the are no longer being used.
- User would still be able to filter by deprecated terms as their could be records that still reference that term.
- The term would be identified as deprecated in the view of records it is referenced on.

Option 1: This was a possibility but the case of prefix was not the best use case. In the end there actually was a more appropriate workaround using number generator

Option 2 (After evaluating both options it seems this is still the preference)

- Implement a default value for prefix and suffix
- Default would be selected automatically when creating new records.

Picklists for country and language

Is it possible to use the DIN standard (ISO-639)?

For language selection in organizations app

The selection should only contain current (living) languages and country names as a selection option in the UI - e.g. Old English would not be used as default language.

Finance - Villanova University would like to be able to filter and export transaction details from budgets in the Finance app.

- Use case: Funds are set up by selector and it is helpful for selectors to see exactly what has hit their budget
- Use case: To identify miss spent money quickly and resolve/balance it

What would be some key use cases for extracting this information?

- When it is unclear whether an issue may have corrupted budget values it is difficult to review all the transactions on the budget, add them up and verify the balance really helpful.

Would you need transactions for only 1 budget at a time?

At the end of the fiscal year we need to review all the totals for all budgets and all the activity that happened between the budgets. Having all of these values available for comparison is a must.

At certain intervals of the year we need to communicate with accounts payable and reconcile discrepancies. This could be hundreds funds and thousands of transactions.

What detail from the transaction would you need (i.e. Transaction date, Fund code, source, From and To, amount, budget ID, Expense class, Description, tags)?

- Needing to select each transaction individually for more detail is debilitating and makes further investigation in this area incredibly time consuming. Ideally it w
In progress

Specify credential access at the interface level

Organizations - Currently, the ability to view interface credentials is all or nothing with permissions. Villanova University would like to be able to specify at the interface level; perhaps everyone can access the reports interface credentials, but only acquisitions managers should be able to access invoice/payment portal interface credentials.

Use cases:
- May want to restrict the credentials for specific interfaces (Payment portals or something with more restricted licensing) some of these portals contain more sensitive information.
- For Multi-institution organizations this would also be true. That certain organizations would have only certain people that should be able to see the confidential organization.
- Suggestion: Might be helpful to limit access by interface type.
- On an org that is not a vendor there could be a set of dropbox credentials etc. In some cases libraries might create an organization record for themselves and platforms are also created as organizations and creds associated with them can be more sensitive.
- Given that people can leave jobs etc it is less desirable to hide the entire interface. Users may not need to know the interface but there is no reason to hide the interface.

Closed

Configuration to enforce entry of lock total

Invoices - Villanova University would like a configuration added to Invoice settings to force entry of a lock total amount on all invoice records.

Closed

Invoice Templates

Invoices – it would be very helpful to have Invoice Templates like for Orders. We key in far more Invoices than we EDI them in. Templates would save us time, clicking
Display Vendor Name (Code) (as well as Vendor Invoice # — see above #86 – on Invoice Line)

Invoices – It would be helpful to have the Header on an Invoice Line display not just "View invoice line - 1" etc but also who the Vendor is (Name with Code in paren) click back to the invoice itself to orient oneself. Or, depending on how one got to the Invoice in the first place, drag the 3rd pane smaller again to maybe see if the inf available depending. E.g., Not Obvious:

OR just not there (in the middle pane – so one has to X out of the invoice line):

and if I do that I had better remember what my invoice line or title was to be able then to get back to it again:
When I am in the Order Line, I do not know with what Vendor I have placed the/an Order. (The Material supplier in the Physical or Electronic resource detail accordion is not necessarily the same! and even when it is, the info is not where it is needed.) So if I do a Order Line Search by Title, I have to X out of my result to see with whom I have the title on order, and in some cases, if my search has multiple results, I have to click on one after the other and each time out from the POL view (not a perfect example, but mostly so):

>>> to the POL view >>> Material Supplier NOT our Vendor Name/Code

and so to see that I need to new Click on Actions & then Click on View PO ..., which will take me to the PO, but then I will have lost my initial search & results:

The Preference: Have the details appear in the header of the POL rather than in the body under a "Vendor information" accordion.

Export organization records to CSV

In light of other developments to the export of acquisitions information under UXPROD-2665 Export records from search results in acquisitions apps CLOSE

It's also been noted that in other apps supporting export to CSV, notes added via the Notes app are not included in export. This may be a larger discussion, but I war ultimately needs to happen.
I need to be able to distinguish between what invoices have been marked for 'Export to accounting'—which is a filter—with our 'Batch Group'—also able to be filtered on. Once they have been exported then the accordion 'Voucher export details' gets added to the Invoice and includes that it was uploaded under Batch file status and when that occurred under Batch file name. I could then figure out what invoices marked for Export to accounting in my Batch Group had NOT yet been actually exported.

Concerns summary:
1. Identify what invoices that WILL be included in the next Batch voucher export run.
   a. Can be done today but because the date range is a "day" this filter could include invoices that were actually exported already.
   b. Ideally there is a filter to "Exported" so I can exclude anything that has already been included on a batch file.

To have a quick overview of frequently needed information and to avoid of "jumping" between multiple apps, it is desired to have additional acquisition data displayed:
- Cost
- Acquisition method
- Organization code (extension by supplier name and linking to the respective data record)
- Fund

Use case:
User loses item (i.e., a physical item) and needs to know how much they will need to pay for it. Ideally this cost data would be an accurate cost for the item from the invoice app. If there are special funds that have restrictions that could complicate replacing the material. Helpful to show but not necessary to have it appear there. Costs in inventory may edit this cost field manually when an accurate cost is not available in acquisitions. (Talk to metadata)
- Cost could be used to communicate a replacement fee to the patron for a lost item.
- In some cases there was a flat fee for replacing items. It was also possible to input a specific cost for replacement based on what was actually paid (invoice cost).
- Not all things have related invoices. They might have been migrated in 100 years ago or they might be gifts and there is no invoice record.
- Replacement fee does not necessarily directly related to the material type. There could be a large gap between saxophone and cowbell but they are both musical instruments.
- When there is no cost and the item is older staff will check value on amazon to verify the current price and determine the replacement fee.
- There are special funds that have restrictions that could complicate replacing the material. Helpful to show but not necessary to have it appear there.
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- There are special funds that have restrictions that could complicate replacing the material. Helpful to show but not necessary to have it appear there.
- Users in inventory may edit this cost field manually when an accurate cost is not available in acquisitions. (Talk to metadata)

We would like to see an amount in Finance that shows what has been expended without the inclusion of credits. For example: We had a fund where we had a large credit this amount. At the end of it, you cannot tell that this even happened from the Budget Summary screen. It only looks like we’ve spent $1,532.10. You must click into __get the total amount of what has been spent (without credits) from there, you would then have to add up all those transactions manually. We would like to see the "absolute expenditure" (not including credits). This is important when large credits are processed from previous years.
In the Holdings record, the format can be set. It can be electronic or physical. In the Order line, the Order Format can be set. Can this value be transferred to the Holdings record when creating a new Holdings Record in Inventory using the Create Inventory Function? That way:

Note: Currently the holdings type field is NOT populated with a value when the holding is created by the holdings app. This is problematic because it is difficult to identify these holdings and clean them up.

Electronic Resource Order Format = Electronic Holdings Type
Physical Resource Order Format = Physical Holdings Type

What to do if the order format is mixed (P/E Mix) = Physical Holdings Type (user would need to manually adjust holdings as desired as they currently do)
What to do if the order format is other (Other) = Physical Holdings Type (These might be an edge case as generally order format is used with a create inventory setting)

Note: Holdings type is a configurable field so in order for the application to set this field we likely need specific mappings allowing an area in settings where users could select a corresponding Holdings type for each available order format. Being able to map a default value could be a short term win to allow these holdings to be identified post order more easily and corrected. Otherwise just allowing user to specify the holdings type per order line would account for more of the possible complexities.

Could we in general review and understand what fields are editable in a PO that is open and why? Thinking about this list of fields in the Order: Acquisitions Orders & Unopening/reopening POs can be problematic, as it impacts Receiving and the connection to Inventory, so we don’t like to do that. While we understand that some fields are problematic, it is difficult to identify these holdings and clean them up.

- Donor
- Selector
- Check/uncheck Rush box
- Vendor Account Number
- Instructions to Vendor
- Requestor
- Subscription to
- Subscription Interval

Are there other fields that other libraries would like to be editable? Happy to make this a broad discussion.

Discussion:

Vendor account number

- Often vendors will change your account number (assign you a different account number)
- I had a gobi order this week I needed to change the account # on to reflect it was now a UK order. Everything was the same, but who Gobi was getting it from changed.
- Processor may assign the wrong account number when creating the order
- The account number is often review when the invoice is paid, to be sure the payment is attributed to the correct account. Being able to correct the number on the invoice is helpful. But because users look at the order when paying they risk making the mistake if the order cannot be updated.
- We would not expect the order to re-export when the account number is changed. Users should need to actively trigger re-export (The same goes for Location)
- Added by Kimberly Pamplin - 10/4/2023: Would it be possible to have the location on a PDL changeable if it is set to code and not tied to holdings?

When creating a PO or adding a new Invoice and doing an 'Organization look-up', the 'Search & filter' options do not match those in the Organizations app. Can we update the plugins to sync the two?

When creating a pre-set adjustment in Settings > Invoices > Adjustments, it would be great to be able to specify a default fund for an adjustment that is not pro-rated. Currently there is no place to select the fund, so it must be manually applied on each invoice:

```
<table>
<thead>
<tr>
<th>Description</th>
<th>Type</th>
<th>Always show</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipping</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

Added by Kimberly Pamplin - 7/3/2023: Sometimes orders change vendors. While you can change the vendor without unopening an order, it looks like FOLIO defaults the order line to using the first account associated with the vendor. This is true even if the first account listed is inactive. Would want to be able to select the appropriate number without having to unopen order.

Added by Kimberly Pamplin - 10/4/2023: Would it be possible to have the location on a PDL changeable if it is set to code and not tied to holdings?
97 FOLIO invoice id vs. vendor invoice #

On Purchase Order screen, under “Related invoices” segment where invoices are listed, the first column is named “Invoice #” when the value displayed is actually the fourth column with a precise name “Vendor invoice number” (see attached screenshot). It’s a bit misleading the heading of the first column to be “invoice #” when it refers to and use on regular basis. Wondering if it makes sense to re-label the heading of the first column to something else such as “FOLIO invoice id” or “FOLIO invoice reference #” to convey what the data really represents and to reduce confusion?

Discussion:
- The hyperlink to the invoice is necessary.
- The “FOLIO invoice number” is not valuable to users that are navigating related invoices. Ideally this would just be replaced by the Vendor invoice number and

98 Orders: Add “Receiving workflow” as filter and export to .csv

The POL “Receiving workflow” field isn’t included as a POL filter or included in the Actions > Export results (CSV) file.

- Troubleshooting and reporting would be easier if this field were included in one or both places within the Orders app.
- Use case: User is trying to resolve issues with orders that are of a certain workflow.

Ideally also able to filter by order type when searching POLs. The limited ability to combine order and order line filters forces libraries to export order information and:
- When search is possible in the FOLIO UI it is easy to share the results with other users etc. and get their help resolving issues.

From Julie at Duke: While we’re looking at this, should we also consider adding the “Receiving workflow” as a filter in the Receiving app or is it sufficient to just inclu

99 Building invoices from smaller vendors: embedded MARC

is about building invoices from embedded MARC. This is 1 with Google scripts which is not a good long term solution and has limitations. EDI invoicing will be helpful, but we have many smaller vendors/approval plans where these invoices. Could we get an update on when this will be scheduled? And what are other libraries doing without this functionality?

Other libraries like GBV are also interested in other formats like XML (They are using PICA XML) for creating invoices as EDI is not always possible. Standardized cc ZUGFeRD. They mainly affect financial systems but it is important for German libraries that FOLIO will support invoice import not only for EDI but also for different fo

100 Orders

Viewing a PO in Orders app looking at related invoice lines accordion: Would be useful to show start and end of subscription as part of the table; should display the

Goal: allocate piece and invoice line

Create inventory
- Instance, Holding, Item

Material type
book

Notes

No notes found

Related invoice lines

<table>
<thead>
<tr>
<th>Vendor invoice number</th>
<th>Invoice line #</th>
<th>Invoice date</th>
<th>Vendor name</th>
<th>Status</th>
<th>Quantity</th>
<th>Amount</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>02/09/2023</td>
<td>Amazon.com</td>
<td>Paid</td>
<td>1</td>
<td>$10.00</td>
<td></td>
</tr>
</tbody>
</table>

End of list
101 Invoices: View associated budget | CLOSED
The Finance app has a way to navigate from the budget to an invoice (via the transaction log), but there is no reference in the opposite direction. It would be nice if it paid off to determine what fiscal year the invoice belongs too. It would also be useful to be able to filter on this when searching in the Invoices app.

Note: This would be very similar to the way that Nolana invoice lines link out to encumbrance transactions in Finance.

102 Invoices: If Voucher Export is run without a server to Upload to then download is possible but Batch No status displays as Error | OPEN
With UXPROD3600 (Morning Glory) one can now manage Voucher Export without needing access to Settings—which is great!! BUT since FOLIO is unable to upload access to anything but a secure server, we run the Voucher Export and then download the file and "manually" handle the rest ... So far so good as far as being able to upload however, the Batch file status displays as Error, which is really confusing, because it makes it seem like we were not able to get the invoices/Vouchers out to their destination.

Could there be a third option, Error or Failed, for when it truly failed; Uploaded for when it successfully uploaded to a server; and then something (Batched ??) for when it was created but not uploaded anywhere.

Seeing Error in Voucher export details on Invoices is especially confusing.

103 Invoices: No duplicate warning when set to Approve/Pay | IN PROGRESS
When an invoice duplicates on vendor, invoice date, and invoice number, a duplicate modal will pop up. Currently (in Nolana) this occurs when an invoice is created, edited, or approved. When the setting "Approve and pay in one click" is active, however, it seems that this modal is bypassed. Since approve is part of this process, it seems like the behavior should be consistent with approving and cause the modal to appear.

When using "approve and pay" the duplicate check is not being executed.

104 Invoices: Navigating invoice lines | IN PROGRESS
When reviewing invoices and needing to see a more detailed view, it would be helpful if one could navigate back and forth between invoice lines without having to scroll line 2 clicking backward (or previous) would take me to line 1 and forward (or next) would take me to line 3. Visually this might resemble the "Previous" and "Next" button would save clicks and make the review process more efficient.

In addition, it might be useful to have a placeholder indicator to inform you of the line you just closed out of. (Perhaps the line stays highlighted in blue?). Even though hit back button in browser, (in which case this does not work), a visual clue might be helpful if possible to remind the user where they are at. This is particularly so on longer invoices.

Use case: The user is reviewing invoice that was generated via EDI and has multiple lines. The user may or may not need to edit the line. When editing some prefer to navigate back to the line on save and some circumstances you may want to navigate back to the invoice. When taking you back to the invoice it would be nice if it was clear which one you just updated.

Note: The pattern used for selecting invoice lines should be updated to the most recent pattern used in search result pane.

105 Orders/Search for POLs in search and filter pane via instance HRID? | IN PROGRESS
Are there any plans to make the HRID of the linked inventory entity searchable? The POL should be able to easily access this via the UUID link. If the POL is linked to an instance, it should be possible to search for the instance HRID. Use selects index and executes a search for the POL based on either Instance HRID or Holdings HRID. In the case of a package POL there might be multiple HRIDs.

106 Orders/Invoices: Automatic Slashes for Dates | CLOSED
Is there any way it would be possible to have the slashes in date fields automatically input when typing? This is a very minor thing, but between orders and invoices I markings between were automatically added.

Some examples:
Orders - Renewal date, Subscription from, Subscription to. Using any of the date filters.
Invoices - Invoice date, Subscription start date, Subscription end date, Using any of the date filters.
Lehigh would be interested in a functionality that adds a Reporting Code (similar to Method of Acquisition) that helps track non-Acq. related data points (e.g., "DEIA Shelf Project").

This should be reportable via LDP and uses vocabulary that we can edit.

There is an ask from the reporting group to identify things that are bought for specific projects. These projects span multiple projects. The amounts need to be as accurate as possible to satisfy auditing requirements.

Questions:

1. Would these need to be applied to Orders AND Invoices? Any other acqu records? Yes, this value should be added to the order and then carry over to the invoice.
2. Would this need to be a multi-select? I.e., have the ability to apply more than one Reporting code to a given record? Yes, there could be varying levels of specificity.
3. Would codes potentially need to be deprecated over time? Should each code have a status and only allow users to apply active codes to records? Yes, there are one-time projects that last short periods of time. For auditing purposes, we need to keep these values around but users would no longer be applying them to new orders/invoices.

Note: Even though this code is identified at point of order there could be reporting benefits to having it be inherited by invoice AND transactions (Encumbrance, payments).

The Actions menu for notes in the Organizations app has the actions listed in reverse order from other Actions menu lists. Normally "Edit" comes before "Delete," but in the Notes "Delete" comes first.

This is very low priority, but, it seems like it should be consistent with other menus. (We are still in Lotus at present, but this also appears to be the case in the Orchid.

It would be very helpful and time saving if the Subscription start and end dates could be included in the "Related invoice lines" section of the POL. When checking the time each individual invoice paid for, I'm happy the comment field displays, because that is where we record what vols were paid for on standing order invoices. We need the same display for our subscriptions.

If space/scrolling is an issue, could the vendor name be replaced with vendor code? And maybe the vendor invoice number could be abbreviated a bit to Vendor Inv#, Inv Line #, etc.

Note this is related to topic 101.

As long as no user is assigned to an acquisition unit I can delete the unit. I created a unit called "test" and deleted it afterwards. I can't recreate this unit - or create a "test" already exists. Is this a bug?

Right now the only thing stopping me from deleting a unit is having at least one user assigned to it. I can even delete a unit that was used in creating an order. After it becomes inaccessible, I think it is way more important to not allow the deletion of an acquisition unit as long as a unit was used in creating an order.

Are there plans to create widgets for acquisitions apps in the Dashboard? I could see this being really helpful with Orders or Invoice information. The specific case is in Orders to let me know when our ongoing direct orders are due for renewal. Or maybe the ability to filter on dates in Invoices to approximate when ongoing orders...
Retro fit a POL as a Package and/or add POL to Open Ongoing Order to handle Name Change (other instances)

Once all the invoice information and receiving data has been collected ideally users would be able to add additional POLs because for print and electronic this can be more appropriate to allow users to add new POLs to Open orders. Alternatively it would be helpful to be able to convert standard POLs to Package POLs. Ideally this would not disturb existing connections but allow users from that point forward to add additional receiving titles.

Are there use cases for adding POLs to one time orders? No specific workflows but the flexibility could be useful.

Note: Order history should show the adding/deleting of POLs

Orders: Customizable Fields

May be already covered sufficiently by topic #107 - The Agreements App has the ability to create customized Supplementary properties that are also really useful in allowing us to track data points specific to our library that get crowded in our note fields and that are difficult to search on.

For libraries that are not using “Package” POLs it might be appropriate to allow users to add new POLs to Open orders. Alternatively it would be helpful to be able to convert standard POLs to Package POLs. Ideally this would not disturb existing connections but allow users from that point forward to add additional receiving titles.

Are there use cases for adding POLs to one time orders? No specific workflows but the flexibility could be useful.

Note: Order history should show the adding/deleting of POLs

Organization Interface types are currently hardcoded. Universita Degli Studi Di Modena E Reggio Emilia has suggested that we add a new type for “Holdings”.

Are there other institutions that would like to see more values added to the list of interface types? Should this be enhanced such that users can added new types as controlled vocabularies in settings?

Right now, on the holdings record, there is an open to choose to have pieces display to the public or not, if the pieces are added directly on the holdings record. They can be added to the holdings record with the option “Display on holdings”, but there is no way to choose to display the piece to the public or not. And pieces connect “Display” to display unbound issues, and then uncheck the box once the pieces are bound together, since access is now through an item record. Because of the lack of control for pieces connected to receiving, but instead receive them directly on the holdings record. We would like to be able to indicate whether a piece should be “Public Display” or not for unbound issues are bound.

The red circle with a slash symbol displays for cancelled titles by the PO number when searching PO, and also by the POL number in the POL accordion.

Could the icon also be displayed in the POL number column for Title or package names in the “Linked Packages” list? This would be helpful!

Orders: Create PO Line: Physical Resource Details

Create Inventory drop down does not have “Item” as a choice. This is problematic when ordering replacements or intentional duplicates. There is no way to only add
| 119 | Invoices: Disbursement amount | If a disbursement amount is added to a voucher it should be taken into account in the budget. Currently the disbursement amount has no effect on the budget. Use Case: Invoice is paid in a different currency, the exact amount differs day by day because of the exchange rate. The disbursement amount is used for the actual original amount of the POI in the original (foreign) currency. |
| 120 | Finance: change presettings for search & filter | We would like the status filter to be set to "active" by default when opening the Finance app. We would like to do this in the ledger tab as well as the group and fund tab. |
| 121 | Orders, Order Lines, Invoices: Add a filter | Could we add Ledger Group as a filter to Orders, Order Lines and Invoices? This would allow for a way to group transactions that are affecting a whole group rather than the same as the expense class feature in both orders/order lines and invoices. [See differences in images below] |
| 122 | Method of Acquisition | Could we make it so we can delete default Method of Acquisitions in the PO line creation dropdown? It gets in the way of staff UX here at Lehigh. It is unclear if this is adequately handled by . Reported by Daniel Huang and Maccabee Levine |
| 123 | Receiving App: Fields from Holdings item level in piece information | At the moment there are just some fields from Holdings and Item level in the piece information.  
1. It would be very useful to have more fields from Holdings and Item level in the piece information so that we do not have to go to the Inventory App to fill out the information.  
2. If the fields on Holdings and Item level in the Inventory App are populated afterwards, it should be also possible that these information are also shown in the fields.
When changing the vendor in an existing PO, the vendor is not updated in the POLs Material Supplier under Resource Details.

This happens in all scenarios - open order, reopened order, unopened order. This means staff then have to go into every POL to change the vendor.

We would always expect the vendor to be changed in the POLs if it is changed at the order level - I know this may not be the case for all libraries.

Perhaps it could be an option when changing the vendor whether or not to change the Material Supplier in all of the POLs.

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One-Time Orders of Multi-Volume Sets are problematic in FOLIO currently. Multi-Vol sets come in various flavors and with different scenarios:

1. It is known at the outset that it is a multi-volume set. There is a single price, but 2+ items that are sold as a single (1) unit. In this case one can choose to Receipt Quantity and keep the Cost Quantity physical & Location Quantity physical as 1, OR, (b) divide the vendor's unit price by the number of expected items and set Location Quantity physical to the expected items number so that the total for the Estimated price = the vendor's unit price. And then Open the Order. If one goes with option (b), the Order will Close after also being Paid. In the case of option (a), the Order will Close as is, and all the items are created at the time of opening the order [so if needed one can place holds on all of them at that time] BUT the single unit cost is divided across 1

2. It is **NOT** known at the outset that it is a multi-volume set, there is a single price, the vendor indicates a single unit for sale, but in fact there are 2+ items. It could open it again & handle like described in 1)-but if unopening again is not desirable then one can either (a) use the Receiving App to receive one of the vr Piece Comment field to show on the Holdings record and Nattax variously besides then in Inventory creating the additional items directly, on the same Holdings each POLs Physical Unit Price to Xf so that when one then creates additional Expected Pieces in the Receiving App on the Receiving record, which then triggers the Cost with the original Estimated price = the vendor's unit price again. Basically implementing (1b) above after opening with the same Xf (- = the single unit cost is divided a to the POL via Receiving App Pieces and do not show in the Receiving Record, etc. & the Receiving Note may be missed, which may indicate that the items are Req

3. It **NOT** is known at the outset that it is a multi-volume set (there is a single price, the vendor indicates a single unit for sale, but in fact there are 2+ items cost & quantity). At this point–as far as I can tell–while one is still able to edit the POLs Physical Unit Price, one is NO longer able to create additional Expected Pieces in Receiving the options become (a) to handle like (2a), OR, (b) to Cancel the Invoice, then proceed according to (2b), and then re-entering etc the Invoice. Now however is not or tweak the invoice number to make it unique from its first now cancelled version AND the manual entry of the invoice pulls in the now Cost Quantity physical which is the invoice is entered or EDiEd into FOLIO and linked up to the POL.

What would be great [and I think take care of all of the above outlined scenarios] is re: One-Time Orders set to Receiving Workflow: Synchronized Order and Receipt Location Quantity physical were not tied to each other. That is, that they did not have to match. And (b) for the Receiving Expected Piece quantity not to be tied back physical. And (c) for POL Receiving Workflow: Synchronized Order and Receipt Quantity. If NOT be the creation/adding of Expected Pieces in Receiving that change way around. That is, one would have to be able to edit the number of the POL Location Quantity physical and that then would change/add how many Expected Piece be tied to the Location Quantity physical and not to the Cost Quantity physical.
We use prorated adjustments to apply tax to invoices. FOLIO uses banker's rounding (rounding to the nearest even) but our university does not. We round up for values of half a penny and above and round down for values below half a penny. We should be able to change or choose the way FOLIO handles rounding.

Also we're not sure if this is what is causing some discrepancy between the invoice line fund distribution amount vs. the actual transaction amount, as shown in this example:

### Fund distribution

<table>
<thead>
<tr>
<th>Fund</th>
<th>Expense class</th>
<th>Value</th>
<th>Amount</th>
<th>Initial encumbrance</th>
</tr>
</thead>
<tbody>
<tr>
<td>SPEC(SPEC-SUL)</td>
<td>-</td>
<td>3.0384%</td>
<td>$5,456.42</td>
<td>$0.00</td>
</tr>
<tr>
<td>STANDISH(STANDISH-SUL)</td>
<td>-</td>
<td>12.1212%</td>
<td>$21,824.98</td>
<td>$0.00</td>
</tr>
<tr>
<td>SASIA(SASIA-SUL)</td>
<td>-</td>
<td>11.3062%</td>
<td>$20,357.52</td>
<td>$0.00</td>
</tr>
<tr>
<td>MIDEAST(MIDEAST-SUL)</td>
<td>-</td>
<td>12.1212%</td>
<td>$21,824.98</td>
<td>$0.00</td>
</tr>
<tr>
<td>PROTHRO(PROTHRO-SUL)</td>
<td>-</td>
<td>39.6364%</td>
<td>$71,367.82</td>
<td>$0.00</td>
</tr>
<tr>
<td>MOULTON(MOULTON-SUL)</td>
<td>-</td>
<td>4.5957%</td>
<td>$8,274.85</td>
<td>$0.00</td>
</tr>
<tr>
<td>ROSS(ROSS-SUL)</td>
<td>-</td>
<td>0.8959%</td>
<td>$1,612.94</td>
<td>$0.00</td>
</tr>
<tr>
<td>KOPPERMAN(KOPPERMAN-SUL)</td>
<td>-</td>
<td>1.384%</td>
<td>$2,491.98</td>
<td>$0.00</td>
</tr>
<tr>
<td>DONNELLD(DONNELLD-SUL)</td>
<td>-</td>
<td>14.9691%</td>
<td>$26,844.77</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### Voucher lines

<table>
<thead>
<tr>
<th>External account number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1065031-105-KARVE</td>
<td>$71,367.82</td>
</tr>
<tr>
<td>1065032-122-AALIB</td>
<td>$20,357.52</td>
</tr>
<tr>
<td>1065087-104-KARZU</td>
<td>$21,824.98</td>
</tr>
<tr>
<td>1065032-104-KAVEQ</td>
<td>$8,274.85</td>
</tr>
<tr>
<td>1065090-101-AALIB</td>
<td>$5,456.41</td>
</tr>
<tr>
<td>1065031-105-KAQQA</td>
<td>$26,844.77</td>
</tr>
<tr>
<td>1065032-120-AALIB</td>
<td>$21,824.98</td>
</tr>
<tr>
<td>1065032-116-KARJQ</td>
<td>$2,491.98</td>
</tr>
<tr>
<td>1065032-116-KAQPQ</td>
<td>$1,612.94</td>
</tr>
</tbody>
</table>

When there are multiple funds split by percentage on an invoice line, is it possible to show in the json returned by okapi the item and adjustment amounts for each fund?
For invoices in foreign currencies, is it possible to show in the json returned by skapi the item and adjustment amounts converted to the system currency for each fund?

**Accounting code**

<table>
<thead>
<tr>
<th>Vendor reference number</th>
<th>Vendor reference type</th>
</tr>
</thead>
<tbody>
<tr>
<td>GANNANDO/JFY7701</td>
<td>Vendor internal number</td>
</tr>
</tbody>
</table>

**Fund distribution**

<table>
<thead>
<tr>
<th>Fund</th>
<th>Expense class</th>
<th>Value</th>
<th>Amount</th>
<th>Initial ency</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAPAN(JAPAN-JUL)</td>
<td>-</td>
<td>100%</td>
<td>¥2,183</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

**Adjustments**

<table>
<thead>
<tr>
<th>Description</th>
<th>Value</th>
<th>Pro rate</th>
<th>Relation to total</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX_0125</td>
<td>¥183</td>
<td>Not prorated</td>
<td>In addition to</td>
</tr>
</tbody>
</table>

As a user I need to add multiple languages to a contact person or the general contact information.

**Contact information**

<table>
<thead>
<tr>
<th>Use as primary address</th>
<th>Address 1</th>
<th>Address 2</th>
<th>City</th>
<th>State/Province/Region</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10 ESTES ST</td>
<td>PO BOX 602</td>
<td>Ipswich</td>
<td>MA</td>
</tr>
<tr>
<td>Zip/Postal code</td>
<td>Country</td>
<td>Language</td>
<td>Categories</td>
<td></td>
</tr>
<tr>
<td>01938</td>
<td>United States</td>
<td>English</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In the Linked Agreement Lines section of the POL, the links to the Agreement Lines are actually displaying the Agreement Name not the Agreement Line Description needed to fix this.

<table>
<thead>
<tr>
<th>130</th>
<th>Display Agreement Line Description in POL instead of Agreement Name</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Agreement line information" /></td>
<td><img src="image" alt="Linked agreement lines" /></td>
</tr>
</tbody>
</table>

131 Orders: display of prefix and suffix at PO numbers

Currently, prefixes and suffixes are displayed connected to the PO number. They can only be separated by adding letters to the prefix or suffix. We would like to visually separate both prefixes and suffixes with special characters (e.g. `-`). This would increase readability.

```
40UB10126SB
91UB10125NE
40UB10123
```

132 Invoices: Include Invoice date in exported vouchers

Currently the Invoice date field is not included in Vouchers. Our Accounts Payable office requires this field so when we use Voucher Export to batch export vouchers simplify our process significantly.

133 Orders/Inventory: Move holding/item data in Inventory should update POL: Instance connection accordingly

Move of holdings/items from one instance to another won't transfer the POL information from the origin to the target instance. Existing JIRAs:

- Data corruption. When holding/item data are moved in Inventory, then the connected Order lines are not updated accordingly (from 2021)
- Theme: Ability to maintain relationships between other apps when holdings/items are moved (from 2019)

Workaround: initiate the move from the order rather than the inventory record for any inventory records that have related acq data.

But: Initiating the transfer in the Orders app won't work in all scenarios, e.g. when the move of holdings is triggered in an external source and not from within FOLIO.

That will most likely apply in other libraries as well, in case they let their Inventory be controlled from an external system like a union catalog.

134 Receiving app: "Display on Holding"

Is it possible to set "Display on Holding" to always active somewhere in the app settings = make it configurable in settings?

Alternative: Would it be possible to check or uncheck the checkbox for "Display" in the process of receiving? Otherwise users need to edit the piece always as a say