2022-06-17 Acquisitions Meeting notes

Date
17 Jun 2022

Attendees

Agenda
- **Housekeeping** -
  - next meeting Tuesday (6/21) at 1 pm
- **PC Updates (@Kristin Martin)** -
  - [2022-06-16 Product Council Meeting notes](#)
  - Updates from the Data Synchronization working group
  - [2022-06-09 Meeting notes](#)
  - SIG updates
- **Business** -
  - Discuss Using MARC Bibs and Data Import to create FOLIO POLs (Ann-Marie Breaux)

Discussion items

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<td>PC Updates (@Kristin Martin) -</td>
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This is preliminary, she will keep updating spreadsheet.

In the powerpoint there are links to other things you might find useful.

Wiki pages:
- Overview/Data import/Folijet Requirements and Planning
- Acquisitions/Thunderjet Planning

Jira features:
- UXPROD-3361: Prep for creating orders from imported MARC Bibs (Morning Glory, Folijet)
- UXPROD-185: Creating orders from imported MARC Bibs (Nolana, Folijet)
- Probably one more feature for related Acq/Thunderjet work (Nolana)
- Maybe a cleanup refinement feature (Orchid)

Most Common use cases:
- One stage of acquisitions work: point of receipt/invoice/cataloging
  - Approval plan automatic purchases
  - DDA/PDA automatic purchases

Two stages of acquisitions work: point of order, then point of rec/inv/cat
- Orders placed on vendor site, then received/invoiced/cataloged
- Orders sent from FOLIO, then received/invoiced/cataloged

Ann-Marie: Any other use cases?

Kristin: We send an order to a vendor but not from folio, we batch create them in folio from a spreadsheet.

From Virginia Martin to Everyone 08:20 AM
+1 Kristin
From Scott Perry (he/him) to Everyone 08:23 AM
How do you ensure that the vendor reference number is unique?
  - Ann-Marie: That depends on the vendor. You work with them to make sure it is.
  - From Lloyd (Marmot Library Network) to Everyone 08:23 AM
    I find that my local order number is a more reliable match point than the vendor number.
  - From Virginia Martin to Everyone 08:24 AM
    We much more heavily rely on local system identifiers than vendor identifiers.
  - From Scott Perry (he/him) to Everyone 08:24 AM
    Is the matching vendor specific? So if Harrassowitz uses the same number as Amalivre FOLIO would know?
      - If it matches to a pol that is not the same vendor, it should catch it.
  - From Christie Thomas (she/her) to Everyone 08:26 AM
    Regarding the instance_hrid because of the order workflow with these vendors, they send us the cataloging and invoice with the instance_hrid in the 001 but they do not know the PO number and there is no vendor reference number to use.
  - From Kristin Martin (University of Chicago; she/her) to Everyone 08:34 AM
    Although currently if you move an item to a new instance in FOLIO, the PO will continue to link to the old instance.

Action items:

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