2022-04-08 Acquisitions Meeting notes

Date
08 Apr 2022

Attendees

Agenda
- Housekeeping
  - Discussion topics in the planning – Fiscal Year Rollover
- PC Updates (Kristin Martin) - written only, away today
  - No PC meeting April 14 or April 21 - Happy Spring Break!
  - SIG Updates 2022-04-07
    - Still looking for members for Support SIG, meet Monday at 10 AM ET. It would be great to get some implemented institutions or Acquisitions experts there
    - need interim convener for MM SIG this summer
    - Discussed the need to support implemented libraries when doing FOLIO upgrades, but ran out of time for larger discussion
    - WOLFcon - what ideas do you have? Looking to get more details than just brainstorming at this point. How can we take advantage of an in-person/hybrid all-hands meeting?
    - Looking for dedicated individuals to help plan. See slack channel: #folio-wolfcon-planning-group
- 2022-03-31 Product Council Meeting notes
  - Update from the Priorities for FOLIO Development subgroup
  - See the full prioritization process and leave comments here
  - This would replace the system of institutional rankings in Jira

Business/Implementer’s Topics
- Video working group – updates & plan
- Implementer's Topics - discuss #33 and continues if time permits -- see Implementer's Topics list for more details - Acquisitions /Resource Management implementers

Chat from meeting
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Discussion items

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<tr>
<th>Time</th>
<th>Item</th>
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| :00  | Housekeeping | Dung-Lan | - Fiscal year rollover will be discussed soon  
|      |      |       | - If you have anything you want to talk about please add it to the implementers list |
| PC Updates | | | Kristin out. Check PC Notes. |
| Wolfcon | | | - FOLIO at WOLFcon - Community Council - FOLIO Wiki  
|      | | | - Wolfcon proposal form - WOLFcon Proposal Form (google.com)  
|      | | | - Every session will be available virtually  
|      | | | - Some small working groups will not have a virtual option  
|      | | | - We have identified topics and maybe even have a few people willing to own those topics. |
| :13  | Video working group | | 7 people have volunteered to be on this group.  
|      | | | Need a doodle poll to be sent out to set up first meeting |
Upcoming UAT's

Dennis

- 3 UATs session coming up related to morning glory
- should happen in a few weeks
- Fund export, voucher export, order export
- There will now be a specific permission for voucher
- From Scott Perry (he/him) to Everyone 08:20 AM
- Is this sFTP?
  - Dennis: no, This was a cosmetic change for voucher export. We still haven't done any changes to the way vouchers are exported.
- From Julie Brannon (she/her) to Everyone 08:21 AM
- Great to see voucher export moved out of Settings - thank you!

Implemener’s Topics

Order and Invoice: Link to vendor Organization record #35

Dennis

- Need to create enhancement. It is possible to do and it does follow the standard we have been setting.
- In invoices, the organization name appears in the header. People have said this is difficult to see, it's not easily noticed. Would you be expecting that to be a hyper link as well?
  - no, just when it's in line on the details screen.
- From Lisa Smith to Everyone 08:28 AM
- Any way to check the vendor address quickly within the invoice would be appreciated!
  - Dennis: The primary address shows in reference details, but not other address you have for the vendor.
- From Sara Colglazier (MHC/SC) to Everyone 08:28 AM
- Adding the Code would be really great
- From Scott Stangroom to Everyone 08:29 AM
- where would the hyperlink take you? to the org record or to the vendor site?
  - The organization record in the organization app
- Sara: Going back to the code: Does the code remain static, and I can change the name and it won't effect anything??
  - Yes
- From Scott Perry (he/him) to Everyone 08:32 AM
- This is a good use case for batch edit.

Implemener’s Topics

on POL: re: Related invoices #37

Dennis

- Sara: For ongoing orders where you receive many things and you pay each time, you want it to show only the piece received on the invoice.
- In Kiwi, the piece is no longer displayed there.
  - This isn't ideal either.
- From Lisa Smith to Everyone 08:37 AM
- I'd like to see both the subscription info & comment field to the display!
- From Virginia Martin to Everyone 08:38 AM
  - +1 Sara, we like that Aleph feature at Duke as well
- From Kimberly Pamplin to Everyone 08:38 AM
  - +1
- From Lisa Smith to Everyone 08:40 AM
  - Both subscription info & comment are valuable for ongoing orders
- From Kimberly Pamplin to Everyone 08:42 AM
  - We would find the dates (subscription from/to) really helpful as well, but could probably put in the comment field as a workaround.
- From Lisa Smith to Everyone 08:43 AM
  - I'd like to see both fields in both POL and invoice. Related invoices is useful in both Orders app and Invoice app. We have staff who are heavy 'order app' users & others that are heavy 'invoice app' users.
- From Lisa Smith to Everyone 08:52 AM
  - I'm willing to scroll to see both!
  - We have been using the comment field to record what vol# we are paying for.
- Summary: It's important to have the comment field, but would want to have subscription information if it's available.
- Owen: Subscription dates from the order or invoice?
  - Dennis: Invoice
  - 08:58 Owen shared his screen to share an example where a field has 4 pieces of information combined in one cell.
- From Julie Brannon (she/her) to Everyone 08:57 AM
- Here's the JIRA to "remove pieces column from related invoice accordion"
- [UIOR-812](https://jira.example.com/browse/UIOR-812) - Remove pieces column from "Related invoice" accordion

- Virginia Martin to Everyone 08:58 AM
  - Our field already looks like its in Lotus rather than Kiwi
- From Virginia Martin to Everyone 08:58 AM
  - I'd be happy to see this information as Owen is demonstrating now
- From Sara Colglazier (MHC/SC) to Everyone 08:58 AM
  - Nice!
- From Virginia Martin to Everyone 08:58 AM
  - (regarding subscription period, volume #, etc. per invoice)
- From Sara Colglazier (MHC/SC) to Everyone 08:59 AM
  - But the Comment field can be more extensive and more free texty ... just FYI!
- From Owen Stephens to Everyone 09:00 AM
  - We also sometimes truncate free text fields in MCLs to stop this kind of over run Sara

Action items