2023-03-28 Acquisitions Meeting notes

Date
28 Mar 2023

Attendees
Aaron Neslin, Alissa Hafele, Ann Crowley, Carol Sterenberg, Dennis Bridges, Dung-Lan Chen, Dwayne Swigert, Emily Robertson, Jackie Magagnosc, Jean Pajerek, Joanna Cerro, Joe Reimers, Julie Brannon, Julie Stauffer, Kimberly Pamplin, Kimberly Smith, Kimberly Wiljanen, Kristin Martin, Lauren Seney, Linh Chang, Lisa Maybury, Lisa Smith, Lucinda Williams, Martina Schildt, Martina Tumulla, Nina Stellmann, Okay Okonkwo, Paivi Rentz, Peter Breternitz, Peter Sbrzesny, Rhonda Fuhrmann, Robert Heaton, Scott Perry, Steve Selleck, Suzette Caneda, Sven Thomsen, Sylvia Hamann, Winter White

Agenda

Housekeeping -
• Implementers Topic #75 to be discussed this coming Friday (March 31 at 9 am Eastern), also our next meeting
• Kristin Martin won't be able to attend this Friday's meeting hence PC update moved up to today's agenda

PC update (Kristin Martin ) -
• Meeting 2023-03-23
  ◦ Update from the Prioritization and Roadmap Group - piloting new prioritization process with RA SIG, review of existing roadmap

Business -
• Martina Schildt presents "Requirements for claiming - claiming levels" | Claiming levels requirements analysis + proposal
• If time allows, Joe will lead discussion re: Implementers Topics #30 (Julie Brannon )

meeting_saved_chat.txt

Discussion items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
<th>Who</th>
<th>Notes</th>
</tr>
</thead>
</table>
| :01  | Housekeeping | Dung-Lan  | • Housekeeping
• New members?
  ◦ Paivi Rentz 12:05 PM
  Hi, I'm relatively new. I'm Paivi Rentz from Texas State University. We're not on FOLIO yet but are planning to move to it. Nice to meet you all |
| :04  | PC update  | Kristin Martin | • Meeting this week cancelled.
• Meeting last week with update from Prioritization and Roadmap Group.
  ◦ Looked back at existing version of roadmap. Looked at progress and ways to update to make more useful.
  ◦ Shifting emphasis from specific timeline to priorities.
  ◦ Want it to be a living document
• Pilot project with RA SIG. Hoping to use a new tool called Air Table to try to get prioritization back into the system.
  ◦ Previously were ranking in JIRA. Did not scale as the project scaled.
• Discussion regarding Air Table. POs would be interested in what it will ultimately look like.
  Kristin Martin 12:13 PM
  here is the prioritization presentation from last spring that covers the workflow. I also put this in the agenda: |
**Claiming levels (order reminders) - requirements analysis**

- Martina Schildt

- German FOLIO community meeting on a regular basis to see about additional needs.

- **UXPROD-1845**

- Claiming levels (order reminders) - requirements analysis

- **Problem description** - In German libraries, it is necessary to apply claiming levels for reminders. That means, that the often multiple reminders of an order can have different periods.

- **Requirements** - 15 min. mark

- **Questions** - 20 min. mark

  - Is assumption that there is only one thing being claimed for each POL? Let's say you have 10 issues for this POL (e.g. New York Times). You're two months into the year and you receive issue number one, but not two. Receive issue number three, but still have not received two. Also miss number four, but receive number five, six, and seven. Would you have a claim open for two issues for one POL?
    - Yes, may happen. Would be good to be able to claim per issue. Will have different receipt dates for the issues. Based on that date, issue will alert for claim.
    - Lisa Smith, Mich State 12:23 PM
    - We would like to be able to claim one or more issues on the same POL.
    - Joanna Cerro (she/her) 12:23 PM
    - So claiming serial issues would be done at the POL level?
    - Joanna Cerro (she/her) 12:24 PM
    - We've been using the "expected pieces" field in the Receiving app for claiming, which has been a good workaround
    - Lisa Smith, Mich State 12:25 PM
    - Yes, may happen. Would be good to be able to claim per issue. Will have different receipt dates for the issues. Based on that date, issue will alert for claim.
    - Lisa Smith, Mich State 12:23 PM
  
  - For first issue may have sent more reminders than the later missing issue.
  
  - Ideally would be same mechanism for series issues and firm orders
    - In specifics, ongoing order claiming might be a bit different.
  
  - Maybe something electronic where there isn't something physical, but don't have access. Would that be a claim as well?
    - Electronic things work a bit differently. In a package, may check a few for access. Users give feedback for others when there is no access. If there is something to claim send an email.
    - Julie Stauffer 12:26 PM
  
  - Have order lines, pieces, and potentially records in a serials management application that don't have a piece. May need some variation in what is the subject of a claim. Subject of a claim might be issue one or five or whatever. May also be a purchase order line in general, but maybe that's not true. With a vendor would you ever just claim a specific title?
    - Standing order or ongoing order for monographic series. If have not received any of the titles, may send a claim that says, we are missing v.1-5.
  
  - Maybe something electronic where there isn't something physical, but don't have access. Would that be a claim as well?
    - Electronic things work a bit differently. In a package, may check a few for access. Users give feedback for others when there is no access. If there is something to claim send an email.
    - Julie Stauffer 12:26 PM
  
  - What I am claiming is v.75, but it is a one-time order. Won't necessarily have a serials receiving record. Needs to pull from POL title/description, but also specific information/instructions already provided to provider or specific information associated with an expected piece.

- **Possible Solutions** - 36 min. mark

  - "One option: The claiming frequency which is specified in the organization record is included as standard in every PO placed with this vendor - unless an individual claiming frequency is defined for this exact PO in the process of creating the PO."
  
  - Claiming levels (order reminders) - proposals (includes proposal mockups)
  
  - Would be good to include claiming setting in orders templates.
  
  - POL would have accordion for "claiming information"
  
  - Only one claiming setting can be assigned.
  
  - Shared proposal mockup of POL line accordion

### Receipt Information

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| :44   | Discussion| - Are a lot of libraries using the order type and acquisition method? Are those maybe the two main things that would impact how you claim something? Is that a common thread?  
  - Martina - These are options, so you could choose other settings as well. Some things need to be claimed earlier than other items. (e.g., newspapers). Need different setting for something two years apart.  
  - Would that be more like material type?  
  - Maybe a combination.  
  - Different vendors have different ways of claiming.  
  - One-time vs. continuing or ongoing order would be first delineation needed.  
  - Julie Stauffer 12:48 PM  
  Claiming urgency can be somewhat subjective -- frequency could play a factor, type of material (e.g., loose-leaf update) as well, but it can also be that this particular journal routes to faculty.  
  - ~:49 - Example of a claim?  
  - When some libraries send a claim want to have institution's header at the top. If printing claim, what would it look like? Having some examples of that would be great to see what data would be desired in a claim (order data, receiving data, organization data, institutional data, etc.)  
  - Claim form with tokens to populate  
  - Build a claim policy  
  - Within policy have a number of settings for how the intervals are managed, etc.  
  - ~:54 - Is there a chance these could be included into claiming development for Sunflower?  
  - Not really sure. Really focused on the present (Poppy release).  
  - Aspects of this are dependent on what is being worked on in terms of serials management. That may impact the timeframe more heavily than other things. Wouldn't want to implement something that would not integrate well with the serials management application.  
  - Claim form may be less dependent on other things.  
  - Claiming could be a standalone application or its own interface. Could be a claim app. Or maybe really closely tied to receiving application.  
  - Scott Perry (UChicago) 12:57 PM  
  There is an Edifact standard for claims, but I've never seen it used.  
  - Joe Reimers (EBSCO) 12:58 PM  
  I've seen it deployed but don't have much detail |

**Action items**