

2017-12-08 Meeting notes

Date

06 Dec 2017

Attendees

- [Kristin Martin](#)
- [Martina Tumulla](#)
- [Sabrina Bayer](#)
- [Ginny Boyer](#)
- [Eric Hartnett](#)
- [Sebastian Weigel](#)
- [Peter Murray](#)
- [Lynn Bailey](#)
- [Charlotte Whitt](#)
- [Steven Brown](#)
- [Bethany Greene](#)
- [Kirstin Kemner-Heek](#)
- [Dennis Bridges](#)
- [Ann-Marie Breaux](#)
- [Ann Crowley](#)

Discussion items

Item	Who	Notes
Minute taker?	Steven Brown	
Announcements/Updates	Kristin Martin	Dec. 22 and Dec. 29 meetings canceled
Inventory workshops <ul style="list-style-type: none">• wiki pages set up with membership• Collecting batch loading use cases for December 18 workshop	Charlotte Whitt	<ul style="list-style-type: none">▪ Batch loading of data, data transformations▪ Watch 12/7 Metadata Management SIG meeting to catch up<ul style="list-style-type: none">▪ Notes: 2017-12-07 Meeting notes▪ Recording: https://drive.google.com/drive/folders/0B7G8S7WF6N20YUM4My1oRTIxSHM▪ Planning to test three use cases, two from MM and one from RM▪ Looking for an RM member to help select the RM case

Receiving	Acquisitions Small Group	<ul style="list-style-type: none"> • Receive Items <ul style="list-style-type: none"> • Can arrive through PO line or invoice • Receiving History overlay for details of items that are partially received <ul style="list-style-type: none"> Question: For patron request during ordering, can there be a notification for the patron triggered so they are notified when the item is received? <ul style="list-style-type: none"> • Receiving is not driving functionality, so this feature may come into play at another later stage of the process. • Question: Edit receiving history to correct mistakes? • Question to SIG: Are there cases where we are receiving items without orders? <ul style="list-style-type: none"> • Gifts - historically need dummy orders <ul style="list-style-type: none"> • Find a way to track this information without using an order record. • Could a gift be a PO Line Type that is associated with a workflow that better fits a gift instead of an actual order to Vendor that would be expecting an invoice item? • Exchanges - does someone need to develop an app for these? • Question to SIG: What is more relevant to see in Received column - # received or # not received? • Question to SIG: Receiving History - how/when would you be wanting to see this? • Question: Receiving partial amount - What will happen in background for invoice? Partial encumbrance remains for the remaining unreceived items? • Question: Receiving for ebooks/other eresources when access is activated without something to "receive"? • Check in vs. Receiving coming soon • Question: Need a new category for eresources instead of forcing them into the monographic receiving method? Access confirmation? • Question: How are standing orders managed/received? Check in. • Next step for Acq small group after check-in: Go through some workflows to ensure that all variables are accounted for.
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Action items

