2017-10-06 RM Meeting notes

Date

06 Oct 2017

Attendees

- Kristin Martin
- Martina Tumulla
- Steven Brown
- Kristen Wilson
- Sebastian Weigel
- George Stachokas
- Ann-Marie Breaux
- Charlotte Whitt
- Eric Hartnett
- Bethany Greene
- Peter McCracken
- Oliver Pesche
- Dennis Bridges
- Anne Campbell
- Ann Crowley
- Peter Murray

Link to Meeting Recording

https://drive.google.com/drive/folders/0B4Y2tEYubbGGZDhPMERjbmVXZW8

Discussion items

Item	Who	Notes
Minute Taker	Steven Brown	Kristen Wilson will open next week's meeting. Two ER&L Submissions were accepted: • The FOLIO Marketplace: a new Model for Library Innovation. Speakers: Jesse Koennecke and Peter McCracken • Working with Workflows: Using the FOLIO Workflow App to support library operations. Speakers: Eric Hartnett and Kristin Martin

eholdings app group:
 	
- We have four volunteers to join subgroup for work in October
  - Kristen Wilson
  - Peter McCracken
  - Bethany Greene
  - Steven Brown
- Khalilah will provide update to larger RM SIG on Oct. 20 meeting
	Kristin Martin	

Discuss Posts you might want to see: - Instances, version 3 - Universal navigation - Locally stored metadata records for eresources	Kristin Martin	Please review and comment.

Order screens: a first look	Acquisitions small group Dennis Bridges	Today's focus: Content and functionality. Headers intended to be collapsible. Order record - fields can be editable. Order format and type will help dictate which fields you see on the screen. Purchase Order details - does the vocabulary used for fields make sense? Some dynamic response will be added (Description text box will only display if Cancellation Restriction box is checked) Fund Distribution can be split among multiple funds. Subscription dates and Renewal dates separated. Renewal Dates only appear if checked as an ongoing order. E-resource Details (only displayed for appropriate titles). Physical Resource Details (only displayed for appropriate titles). PO Summary Change Log - tracks changes being made to this PO Need a Discuss Post to gather additional feedback Questions: Is there a field that provides information about the item? Will be connected to something - CODEX, KnowledgeBase - Relying on KnowledgeBase for linking to POs could be problematic. Want title to be consistent across PO, KnowledgeBase, Bib record. Relate PO for combo package to items within the package. PO line item should represent the way you order (package, membership, print+online, etc.) Do we need inventory record for this link, or can it be stored locally within Acquisitions? Is there anything that should/should not be included in order record? Virginia Martin - E-Resources details are not needed in PO. This subscription information should be managed elsewhere. Will we be able to see payment history in PO? Receipts function has not been built yet, so this has not been addressed. Place to record Donor information (for reporting and for public display)? Should this information be in inventory or PO? Purchase orders one line item per order - would you have multiple order types on same PO? Example: one-time purchase with ongoing maintenance fee. How does this relate to fiscal cycle? Encumbered and paid for each FY. Expect new PO each year. How will this work with EDI - need to send publisher PO the same each year. Publisher needs the PO to stay the same.PO for continuing resource during fiscal year rollover - will the PO number remain or will new/same one be created? Example: Ongoing renewal with one-time backfile purchase. Subscription provider for a title changes - PO stays the same. Publisher changes for title - new usage stat platform, new KB object for it. Managing relationship where vendor, provider, publisher are all different. How much of this needs to be in order record vs. elsewhere? All of this on the PO has been the past/old ILS method - how can we change this for the future? Important for preparation to migrate from old ILS to FOLIO - Do we need a Migration SIG? Don't want to do it all manually. Order Type reporting purposes - Approvals vs. Firms, Memberships vs. Subscriptions? Acquisition Method to address this? Rename the reporting code fields to fit your needs. Do we need some of this to be hardwired instead of flexible for rollover purposes? Change Log - Is that change to PO or on that screen? In line editing. Example: If EDI brings in an invoice or changes other order information Tax fields? More development on the way on taxes Discuss post for more comments: https://discuss.folio.org/t/order-screen-ux-iteration-1/1297

Action items

- [x] Dennis Bridges Create a Discuss post for Order Screens