

Acquisitions Small Group

Charge: The Acquisitions Small Group is working with Stacks Inc. and other developers to refine the acquisitions screens before bringing to the larger RM SIG for full review and comment.

Team Calendars

Current discussions

| Key | Summary | T | Assignee | P | Updated | Status |
|--------------|---|---|------------------|---|--------------|-----------------------|
| UXPR OD-205 | Display help content for FOLIO centric fields using a help icon that shows content on hover |  | Dennis Bridges |  | Jan 10, 2020 | DRAFT |
| UXPR OD-204 | Display a history of edits for the record that is being viewed at the bottom of the view screen for that record |  | Dennis Bridges |  | Jan 10, 2020 | DRAFT |
| UXPR OD-924 | See materials paid for by more than one Fund |  | Dennis Bridges |  | Jan 14, 2020 | DRAFT |
| UXPR OD-201 | Rollover the ledgers funds/budgets into a new Fiscal year (Creating new budgets for all funds at one time) |  | Dennis Bridges |  | Feb 03, 2020 | DRAFT |
| UXPR OD-772 | Rollover Encumbrances into the next Fiscal Year |  | Dennis Bridges |  | Feb 03, 2020 | DRAFT |
| UXPR OD-203 | Close/freeze budgets upon rollover into new fiscal year |  | Dennis Bridges |  | Feb 03, 2020 | DRAFT |
| UXPR OD-712 | Ability to test EDI connection |  | Ann-Marie Breaux |  | Feb 03, 2020 | DRAFT |
| UXPR OD-1845 | Claiming unreceived or unreceivable items |  | Dennis Bridges |  | Feb 03, 2020 | DRAFT |
| UXPR OD-194 | Checkin Maintenance (Adjust the pattern of expected items) |  | Dennis Bridges |  | Feb 10, 2020 | DRAFT |
| UXPR OD-184 | Find item in KB/codex and add details to purchase order line details |  | Dennis Bridges |  | Jan 10, 2020 | DRAFT |
| UXPR OD-680 | Import EDIFACT compatible purchase orders for renewals |  | Ann-Marie Breaux |  | Jan 10, 2020 | DRAFT |
| UXPR OD-1760 | Search result summary widget |  | Dennis Bridges |  | Jan 10, 2020 | DRAFT |
| UXPR OD-1581 | Enhanced receiving history |  | Dennis Bridges |  | Jan 14, 2020 | DRAFT |
| UXPR OD-1986 | Suspend or delay orders |  | Dennis Bridges |  | Jan 15, 2020 | DRAFT |
| UXPR OD-2141 | Navigating from orders to connected agreements |  | Dennis Bridges |  | Jan 15, 2020 | DRAFT |

| | | | | | | |
|-------------|---------------------------------------|--|------------------|--|--------------|-------|
| UXPR OD-531 | Export FOLIO orders in EDIFACT format | | Ann-Marie Breaux | | Jan 27, 2020 | DRAFT |
| UXPR OD-190 | Renew EBSCONET Serials from FOLIO | | Dennis Bridges | | Feb 20, 2020 | DRAFT |

17 issues

Q1 Priorities

| Key | Summary | Assignee | P | Status | Calculated Total Rank |
|--------------|---|------------------|---|-------------|-----------------------|
| UXPR OD-2167 | Value management through transactions Part 2 - Payments, Credits and limits | Dennis Bridges | | IN PROGRESS | 108 |
| UXPR OD-1547 | Check-in and Receiving orders for Packages of material | Dennis Bridges | | IN PROGRESS | 95 |
| UXPR OD-916 | Export Library Accounting vouchers (Payment/Credit Vouchers) | Dennis Bridges | | IN PROGRESS | 74 |
| UXPR OD-1578 | Organizations: Search and filter enhancements | Dennis Bridges | | IN PROGRESS | 73 |
| UXPR OD-1575 | Make Inventory Holdings rely on MARC Holdings (Part 1 of Connect MARCcat, SRS, and Inventory for MARC Holdings) | Ann-Marie Breaux | | OPEN | 70 |
| UXPR OD-689 | Ability to update item record with call number when receiving | Dennis Bridges | | IN REVIEW | 57 |
| UXPR OD-697 | Ability to facilitate ordering and invoicing in currencies other than default currency | Dennis Bridges | | IN PROGRESS | 51 |
| UXPR OD-1448 | Holdings record with an underlying MFHD record. Block edit of Inventory Holdings MARC-related elements | Ann-Marie Breaux | | OPEN | 42 |
| UXPR OD-2210 | Q1 2020 ACQ apps Tags cleanup | Ann-Marie Breaux | | OPEN | 31 |

9 issues

Members

| Name | Affiliation | Title | Role |
|------------------|----------------------|--|---|
| Ann Crowley | Cornell | Finance Specialist | Subject Matter Expert |
| Ann-Marie Breaux | EBSCO | VP, Workflow Services Product Management | Subject Matter Expert, Co-Product Owner |
| Annika Schröder | Leipzig | Systems Librarian | Subject Matter Expert |
| Dennis Bridges | Stacks Inc. | Chief Product Officer | Product Owner |
| George Stachokas | Auburn University | Electronic Resources Librarian | Subject Matter Expert |
| Heather Thoele | Texas A&M University | Acquisitions Librarian | Subject Matter Expert |

| | | | |
|---------------------------------|--------------------------|--|-----------------------|
| John Ballestro | Texas A&M University | Monographic Acquisitions Librarian | Subject Matter Expert |
| Martina Schildt | GBV | Acquisitions Librarian | Subject Matter Expert |
| Michael Arthur | University of Alabama | Dept. Head, Resource Acquisition and Discovery | Subject Matter Expert |
| Susan Martin | University of Chicago | Head of Acquisitions | Convener, Note Taker |
| Shannon Burke | Texas A&M | | Subject Matter Expert |
| Steve Selleck | Univ of Colorado-Boulder | Manager, Searching and Ordering | Subject Matter Expert |

Other Key People (not attending standing meetings, but on call)

| Name | Affiliation | Title |
|---------------------------------|-----------------------|---|
| Anne Campbell | EBSCO | Library Automation Manager |
| Arvind Andrion | Stacks Inc. | Frontend Developer |
| Harry Kaplanian | EBSCO | Sr Director, Product Management |
| Julie Stauffer | University of Chicago | Associate Law Librarian for Collection Services |
| Kevin Horek | Stacks Inc. | Chief Design Officer |
| Scott Perry | University of Chicago | Head, Collection Support |
| Virginia Martin | Duke | Head, Continuing Resource Acquisitions |

Description

The Acquisitions Small Group is a subset of the Resource Management SIG, charged with working with Stacks Inc. and other developers to refine the acquisitions functionality and look and feel before bringing to the larger RM SIG for full review and comment. The Acquisitions Small Group meets multiple times a week to provide input on development efforts. Members not only commit to regular attendance at these meetings, but also to working on projects and tasks outside of meeting times that contribute to the definition as well as presentation of the requirements. The Group's purpose is to move Acquisitions development faster than the single weekly Resource Management SIG meeting, but all work will be presented to the RM SIG for review and approval. Meetings are not recorded, but notes are available on the wiki.

Membership:

Acquisitions Small Group members consist of acquisitions specialists from early adopters and OLE libraries, led by Dennis Bridges and Ann-Marie Breaux, as co-product owners. To keep the group focused and agile, the size of the Small Group is capped at ten experts, with a goal to have all areas of acquisitions covered by the position responsibilities of the institutional members. Institutions may only have one regular member. Individuals with expertise in specialized areas will be invited to Small Group meetings as needed. Additional individuals are encouraged to join the Resource Management SIG, where decisions and directions for acquisitions will be presented for review and approval.

If you want to become a member of the Acquisitions Small Group, please contact [Ann-Marie Breaux](#), [Dennis Bridges](#), and [Susan Martin](#), convener of the Acquisitions Small Group. We will review membership to determine the current needs of the group. If you are a current member of the Group and are no longer able to provide the time commitment of full participation, please let us know too, as we want to provide as many avenues for participation as possible to other individuals. Additionally, Resource Management SIG members or other members of the FOLIO community are encouraged to approach any of the members of the Acquisitions Small Group with questions or discussion topics.

Acquisitions Development work covers:

- Orders (one-time and ongoing, building, sending, receiving from vendors)
- Fund and budget management
- Vendor management
- Contacts (basics)
- EDIFACT orders and invoices
- Receiving

- Payment and invoice management
- Subscription renewals
- Subscription check-in

See full list of [Acquisitions Interface Fields](#) in Google spreadsheet

Related Discuss Posts: Please review and comment there.

- Orders UX Iteration 5: <https://discuss.folio.org/t/orders-ux-iteration-5/1472/20>
- Invoices UX Iteration 3: <https://discuss.folio.org/t/invoices-ux-iteration-3/1473/13>
- Finances UX - Ledger and Dashboard: <https://discuss.folio.org/t/finances-ledgers-and-dashboard-ux-iteration-1/1475/5>
- Finances UX - Funds and Transactions: <https://discuss.folio.org/t/finances-funds-transactions-ux-iterations-5/1474/2>
- Vendor UX Iteration 1: <https://discuss.folio.org/t/vendors-ux-iteration-1/1225/21>
- Updated Stacks Acquisitions Documentation (ERDs, Data Flow Diagrams): <https://discuss.folio.org/t/updated-acquisitions-documentation/1217>
 - Also posted at: [Acquisitions Documentation](#)
- Special Acq/RM Issues during the Fiscal/Academic/Calendar Year: <https://discuss.folio.org/t/special-acquisitions-rm-issues-during-the-academic-year/1170>
- Acquisitions Reports: <https://discuss.folio.org/t/acquisitions-reports-description-and-examples-wanted/1262>

Architecture Documents

- [Acquisitions Credits Module](#)
- [Acquisitions Finance Module](#)
- [Acquisitions Invoice Module](#)
- [Acquisitions Orders Module](#)
- [Acquisitions Receiving Module](#)
- [Acquisitions Vendor Module](#)
- [File lists](#)
- [Use cases for cross-app receiving workflows](#)
- [Use cases for managing donors](#)

Meetings to date:

Meetings are not recorded, but we do take notes for all meetings. Notes for all meetings are attached to this wiki page via the paper clip at the top of this page.

- 18 October 2018
 - Review slides for Container Order presentation at RM SIG
- 16 October 2018
 - Cross-app handling of ISBNs
 - Planning for Container Order presentation at RM SIG
 - POL "Order Format" field
 - Finance UAT feedback and next steps
- 11 October 2018
 - Acquisitions implications of deleting (or marking for deletion) Inventory Instance, Holdings, Item records
- 9 October 2018
 - Container receiving workflow
- 2 October 2018
 - Review reorganized check-in mockup
 - Bill-to/Ship-to addresses in orders
 - Associating contacts and addresses/phone numbers with each other
 - Revised phone number formatting
 - GOBI-FOLIO Order API demo
- 27 September 2018
 - Receiving and check-in related to Containers
 - Bill-to/Ship-to addresses in Order records
- 25 September 2018
 - Brief report on Chalmers Acq discussion
 - Finance UAT prep
 - Data Migration group questions about vendor data elements
 - Receiving and check-in related to Inventory Containers
- 20 September 2018
 - Vendor EDI addresses
 - Data Migration group questions about vendor data elements
- 18 September 2018
 - Data Migration group feedback on vendor types
 - Finance UAT
- 13 September 2018
 - Vendor EDI addresses
 - EDI invoice loading
- 6 September 2018
 - Orders app is in testing

- Orders and Inventory Container records
- 5 September 2018
 - Orders and Inventory Container records
- 30 August 2018
 - Invoice/Invoice line number formatting, structure
 - Order creating an Inventory Container record
- 28 August 2018
 - PO/POL number formatting, structure, requirements
- 16 August 2018
 - Update on Acq Dev current work: Order business logic, Finance sample data, Vendor /Finance tweaks, Order sample data
 - Finance UAT
 - Receiving/check-in
- 14 August 2018
 - Acquisitions units and Teams
 - Placeholder text in Vendor record data fields
- 9 August 2018
 - Vendor UAT results
 - Order material types
 - Acquisitions units
- 2 August 2018
 - Review Order Material Types
- 31 July 2018
 - Check-in for physical subscriptions
 - Possible Services order type (in addition to P, E, P/E combo)
 - Electronic packages
- 26 July 2018
 - Receiving and check-in
 - Package/Membership orders and Inventory
- 24 July 2018
- 19 July 2018
 - Order sample data
 - Gap analysis
 - Vendor UAT
- 17 July 2018
 - Possible new features identified during gap analysis
 - Sample order data update
 - Vendor UAT update
 - Sample finance data update
- 12 July 2018
 - Vendor App UAT
 - Orders sample data
 - Finances sample data
 - Updating holdings/items during receiving
- 10 July 2018
 - Vendor App UAT prep and Discuss post feedback
 - Hard-coded data elements Discuss post
 - Order sample data
- 3 July 2018
 - Vendor app testing
 - Finished order record data elements
 - Reporting, especially in-app
 - Upcoming work
- 28 June 2018
 - Continue review of order record data elements
- 26 June 2018
 - Continue review of order record data elements
- 21 June 2018
 - Start review of order record data elements
- 19 June 2018
 - Initial fund allocations
 - Capturing cancellation reasons for closed orders
- 14 June 2018
- 12 June 2018
- 7 June 2018
- 5 June 2018
- 31 May 2018
 - Review vendor sample data and screen; create list of tweaks for Stacks
- 29 May 2018
 - Finish review of finances data elements; review sample finance data
- 24 May 2018
 - Almost finished review of finances data elements
- 22 May 2018
 - Placing orders without creating an inventory instance, with Virginia Martin (Duke)
- 17 May 2018
 - Finalized hard-coded dropdown list values for vendors v1
 - Begin review of finances data elements
- 15 May 2018
 - Cancellations and reporting with Sarah Kennedy and Sharon Beltaine (Cornell)

- Sample data for finance module
- 3 May 2018
 - Finish reviewing list of vendor data elements
 - Preview of vendor sample data and finances module, in advance of WOLFcon
- 1 May 2018
 - Item statuses in relation to acquisitions, with Emma Boettcher
- 26 April 2018
 - Go over vendor sample data worksheet
 - Discuss future topics and necessary meetings with other subgroups (Emma re: item status, ERM, Holly re: financials/fines/fees)
- 24 April 2018
 - Details for vendor app sample data
 - Ordering pieces of multi-piece works (e.g. multi-volume sets, individual issues of journals)
- 19 April 2018
 - Vendor app feedback
 - Making payments/financial transactions without bib records or POs
- 17 April 2018
 - Review the vendor app
- 12 April 2018
 - Converting invoices in non-USD currency
 - Rolling forward encumbrances for ongoing orders
 - Revisit order types - any additional ones needed?
- 10 April 2018
 - Consider another display option involving 3rd pane for PO line details, invoice line details
 - MARC records, MARC cataloging, batch loading
 - WOLFcon acq topics; TAMU in early adopter mtgs?
- 5 April 2018
 - Finished mapping Order data fields to Inventory Item record (with C Whitt)
- 3 April 2018
 - Mapping Order data fields to Inventory Holdings & Item record (with C Whitt)
- 29 March 2018
 - Mapping Order data fields to Inventory Holdings record (with C Whitt)
- 27 March 2018
 - Mapping Order data fields to Inventory Instance record (with C Whitt)
 - Identifying additional fields to be added to Orders
- 20 March 2018
 - Finance UI for Transactions table (with filtering and sorting)
 - Item/order statuses
- 27 Oct 2017
- 26 Oct 2017
 - Acq vendor connectors (EDI order/invoice, MARC 9xx, Order API): who is developing and timing
- 25 Oct 2017
 - More work on fund record
- 24 Oct 2017
 - More work on fund record
- 23 Oct 2017
 - Clarify a couple more order data elements, especially reporting codes/tags
 - Discuss fund structure
 - Plan EDI/MARC 9xx/GobiAPI discussion for 25 Oct
- Weeks of 9 Oct and 16 Oct
 - A little work on the order screen
 - Mainly concentrating on funds
- 9 Oct 2017
 - finish reviewing order record data elements (some set aside until we get to receiving /invoicing)
- 6 Oct 2017
 - review feedback from RM SIG meeting
 - go over a few more order data elements
- 5 Oct 2017
 - fund code discussion with hbz/gbv
- 4 Oct 2017
 - looked at draft order record screen (to be shared with SIG Friday)
- 3 Oct 2017
 - continue reviewing order record data elements
- 2 Oct 2017
 - continue reviewing order record data elements
 - posted on Discuss re: eContent metadata stored locally vs external KB
- 29 Sept 2017
 - continue reviewing order record data elements
- 28 Sept 2017
 - continue reviewing order record data elements
 - discuss the multiple concepts of "vendor"
 - discuss the impact of a little ERM-type integration into FOLIO for v1, with more to follow in future versions; how will that impact the order record and acquisitions workflows
- 27 Sept 2017

- continue reviewing order record data elements
- 26 Sept 2017
 - continue reviewing order record data elements
- 25 Sept 2017
 - 2 meetings: continue reviewing order record data elements, request info on acquisitions reports and samples
- 22 Sept 2017
 - Stacks/Harry report on this week's Montreal developer meeting & its impact on our work
 - Reviewed/updated Acq Small Group wiki page
 - Planning for next week
- 21 Sept 2017
 - Reviewed fund info gathered so far
- 14 Sept 2017
 - Welcome to George Stachokas
 - Started review of order data elements
 - Prep for RM SIG: vendors
- 12 Sept 2017
 - Figured out how we want to tackle order data elements
- 8 Sept 2017
 - Discussed the vendor/ERM feedback from this morning's RM SIG meeting
 - More ERM background from John Ballestro
 - Need to coordinate any Stacks ERM work with the RM/Austin work
 - Types of vendor platforms
 - Types of vendor agreements
 - Continued discussion of fund management
- 7 Sept 2017
 - Started discussion of fund management
 - Went over EDI order/invoice details
 - Prep for RM SIG: ERD, Data flow diagrams (easy and harder), Vendors
- 6 Sept 2017
 - Introduced Dennis & JD
 - Some discussion of monthly cross-dev UI/UX call
 - Reviewed the scope of Stacks acq work
- 31 August 2017
 - More Vendor record review
 - EDI needs lots more work
 - Brief intro to funds
- 30 August 2017
 - More vendor record review
- 25 August 2017
 - Various use cases for fund flows as order is created & paid
 - FY rollover considerations
- 18 August 2017
 - Leah's data dictionary questions
 - The accounting states money can live in
 - More on the vendor record
- 17 August 2017
 - More on the vendor record
 - Subscription renewals placeholder conversation
 - Need to understand how much of Workflows will be in v1
 - Reviewed how to read ERDs
 - What's needed for migrating subscription orders?
 - EDI basics
- 16 August 2017
 - Introductions
 - Start to look at vendor record
 - Needed acq migration tools (new migration tab on FOLIO roadmap)