2019-05-24 Meeting notes

Date

24 May 2019

Attendees

- Kristin Martin
- Caroline Schmunck
- Jennifer Eustis
- Kathleen Berry
- Jack Mulvaney
- Tim Whisenant
- Andrea Meindl
- Julie Brannon
- Kimie Kester
- Charlotte Whitt
- Owen Stephens
- Dennis Bridges
- Kristen Wilson
- Nicole Trujillo
- Virginia Martin
- Ann Crowley

Discussion items

Item	Who	Notes
Minute taker	?	Kathleen Berry Kristen Wilson
Announcements/updates • Presentation /Discussion on Notes App at ERM Subgroup meeting • FOLIO is looking for Product Owners • Updates from the Product Council • KB providers at the FOLIO meeting	Kristin Martin /All	Notes App- is we are interested we can have Khalilah Gambrell present at this Group. FOLIO product owners: follow link to learn more about getting involved. Product Council (notes linked): • Gap analysis still being compiled. • Information regarding Ebsco's timeline and their development teams progress ALA events: There is a Reception and several sessions. If you are attending ALA please come! Ex Libris rep (did not catch name) will be attending the FOLIO meeting. Others reaching out to Harrassowitz and OCLC. Still waiting for confirmation.

Acquisitions development team:
 	
* Orgs contacts /interfaces demo
 	
* Purchase order automated status updates demo
 	
* Voucher Mockup review
 	
* Purchase Order template mockup review
	Dennis Bridges	Vendors app has transitioned into the Organizations app.
		
		Small group has focused work on interaction between Organizations and other apps. This is the subject of the demo today.
		
		Demo in current FOLIO snapshot stable.
		
		Organizations do not necessarily need to be a vendor.
		
		There is a Vendor checkbox that allows for more fields to be presented to house detailed information.
		
		Contact People
		
		• There is a global list of people so you can either assign them to a given organization OR
		• You can create a new one
		• when selecting and assigning, you can associate more than one at a given time. You can also select a few contacts, then keep searching for additional contacts. the window will keep track of how many total you have selected so you can then add them all one time.
		
		Interfaces
		
		• There are 7 hard coded types of interfaces for the time being.
		• Like contacts, interfaces can be assigned to multiple organizations.
		
		Organizations can have multiple accounts underneath it, so for example if you purchase content from Springer, but pay various subgroups inside Springer, you do not need to set up multiple organizations to accommodate the information. (please correct this note if I misunderstood this exchange)
		
		Orders
		
		• Demo of opening an order and receiving 4 items.
		• Statuses automatically update. received 2 of 4, so status switched to partially received.
		• Can sort orders by status (IE partially received)
		    • FOLIO tracks the PO lines (received or pending) to determine the status of the order.
		• Order lines search functionality demo
		    • quick dip- they are working on this right now.
		• Demo of creating an order from scratch and attaching titles.
		    • Then Dennis opened the order and received the titles.
		    • Q: do we need to load the titles into inventory before order creation?
		        • not necessarily- it can happen a couple ways.
		            • you can do it when you are creating the order.
		            • You can load the title to inventory first and then attach to order
		            • you can have inventory and order records created when loaded into FOLIO.
		
		Order templates
		
		• This feature has been rising in importance
		• Templates will provide a set of pre-populated fields for an order – both POs and POLs
		• Templates will have a name and description to help users identify them
		• A template populates the order form with information, but it does not add or remove fields from the order record itself
		• When creating a new order, you will select a template and it will fill all pre-defined fields with information; the user can then continuing editing the order
		• Phase 2 will be to add other high value features:
		    • The ability to lock a field for editing when using a particular template
		    • The ability to show/hide a field when using a particular template
		    • The ability to require a field when using a particular template
		• Creating templates will be a specific permission
		• Current thinking is that templates could be made available to members of a team
		• Group feedback is that the ability to create personal templates would also be desirable
		• It would also be desirable to be able to clone an existing PO
		
		(We had a long side discussion about cloning and when you need to close an order and create a new order for the same thing because something about it changed. It would be ideal to be able to keep the same order, but we need a clear change log that lets us see historical information about the order.)
		
		Voucher information
		
		• An invoice record has a Voucher Information accordion that appears once the payment process has begun in the "outside world" (aka campus financial system)
		• The information displayed summarizes the voucher, which summarizes the invoice using external account numbers
		• Voucher lines are the total amount on an invoice associated with each external account
		• The total represents the total amount on the voucher
		• A disbursement represents the actual payment – e.g., a check number and amount
		• We ran out of time to finish this conversation – we'll revisit it next week.

Action items

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