

# 2018-10-05 Meeting notes

## Date

05 Oct 2018

## Attendees

- [Kristin Martin](#)
- [Martina Tumulla](#)
- [Peter McCracken](#)
- [Martina Tumulla](#)
- [Ann Crowley](#)
- [Bethany Greene](#)
- [Michael W. Bolton](#)
- [Ann-Marie Breaux](#)
- [Virginia Martin](#)
- [Dennis Bridges](#)
- [Kathleen ?](#)
- [Kristen Wilson](#)
- [Nicole Trujillo](#)
- [Sabrina Bayer](#)
- [Martina Schildt](#)
- [Charlotte Whitt](#)

## Discussion items

Item	Who	Notes
Minute taker	<a href="#">Bethany Greene</a>	
Updates/Announcements from the Product Council	<a href="#">Kristin Martin</a>	<ul style="list-style-type: none"> <li>• Product Council Meeting Minutes (10/4/2018): <a href="https://docs.google.com/document/d/16GLGGBv2f8XV5Y6Ec64pAhdKIxp_Wk9g1yG2ArVIUDA/edit">https://docs.google.com/document/d/16GLGGBv2f8XV5Y6Ec64pAhdKIxp_Wk9g1yG2ArVIUDA/edit</a></li> <li>• EBSCO is offering more developer support for ERM and Acquisitions modules</li> </ul>
Update on Data Import	<a href="#">Ann-Marie Breaux</a>	<ul style="list-style-type: none"> <li>• Development has started on Data Import; working on landing page screen</li> <li>• Discussing mapping incoming information and setting defaults (mapping profiles)</li> </ul>
Acquisitions Activities: <ul style="list-style-type: none"> <li>• GOBI API Integration</li> <li>• Proposed workflow for ordering and checking in "containers"</li> </ul>	<a href="#">Ann-Marie Breaux</a>  <a href="#">Dennis Bridges</a>	<ul style="list-style-type: none"> <li>• FOLIO Order API; Ann-Marie showed GOBI example; once you place an order in GOBI, GOBI will send order information to FOLIO to automatically create an order</li> <li>• Ordering and checking in "containers": revisited conversation about structuring orders               <ul style="list-style-type: none"> <li>• "Container" could be a package; would enter "container" for Order Format in order to mirror what is happening in Inventory</li> <li>• Populate the details in the Container in the "Container Details" section, where you would see "Item Details" if the order was for an item rather than a package of some sort</li> <li>• The system will create a Container record in Inventory</li> <li>• Question about using Inventory material types in Order records, we discussed not wanting to use Inventory material types in Orders - might make sense to have a field "Container or Instance"?</li> <li>• The package isn't physical or electronic, the things within the package could be physical or electronic</li> <li>• Discussion of check in and how to associate titles with Containers; periodicals often don't come with PO numbers so you have to search around the ILS to find the order record in order to check in; wouldn't know what Container to put it in without PO number</li> <li>• For reporting purposes, how to indicate if a Container is a mix of physical/electronic; need to do at the PO level; need physical, electronic, and P+E</li> <li>• Containers could also be used for P+E items</li> <li>• Format information (physical, electronic, both) available at the Order level</li> <li>• Further discussion needed; walk through use cases for next week on Ordering side</li> </ul> </li> <li>• Plan is to start UAT for Finance on Monday</li> </ul>

## Action items



