2018-07-20 Meeting notes

Date

20 Jul 2018

Attendees

- Kristen Wilson
- Bethany Greene
- Dennis Bridges
- Ann Crowley
- Ann-Marie Breaux
- Charlotte Whitt
- Kirstin Kemner-Heek
- Martina Schildt
- Owen Stephens
- Virginia Martin
- Eric Hartnett
- Ian Ibbotson

Discussion items

Time	Item	Who	Notes
	Minute taker	Bethany Greene	
	Discuss posts of interest: Auto-Generating Location Codes and Location Display Format		
	Acquisitions hardcoded list values	Dennis Bridges, Ann-Marie Breaux	See https://discuss.folio.org/t/acquisitions-hardcoded-list-values/1937 Discussion: • po_order_type: right now, it isn't changeable - sometimes the order type may change - would be helpful to have duplicate order function • Need to follow up with Susan about Leased order type - perhaps not appropriate for an order type • Discussion of the need for On-Going Re-encumber order type - could this be useful for standing orders? - doesn't have to be reflected in order type, could be reflected elsewhere in the record - separate re-encumber field with yes/no checkbox - does there need to be distinction between subs and standing orders? - need to be a field that is reportable • workflow_status: need because you don't want the system to delete it, you need the history - in addition, need a field that clearly indicates if the order is open or closed - pending, open, closed (with "error" option in reason for closing) • product_id_type: this is a repeatable field, locally defined identifier option as well • material_type: need to be set by each library, possible to add local terms for material types; FOLIO will have set material types out of the box; difference in material type needs for acquisitions and for access/discovery - this may not be required for Inventory to create an item record - if a brief bib needs to be created for Inventory, it's ok because it will most likely be overlaid • po_line_order_format: physical, electronic, mixture of both • acquisition method: is it important to distinguish between orders that started in FOLIO and orders that started in the vendor system - local vs external could be yes/no field rather than purchase or purchase at vendor system - make them both firm order - add subscription and standing order types - Membership would be useful as an option Picking up this discussion next week.

Action items

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