Date
28 Apr 2020

Attendees
- Karen Newbery
- Tod Olson
- Patty Wanninger
- Brooks Travis
- Paula Sullenger
- Elizabeth German
- Dennis Bridges
- Julie Brannon
- Debra Howell
- Robert Scheier
- Elizabeth Teskey
- Sally Butterfield
- Tracy L Patton
- Jean M. Pajerek
- Janice Pfaff
- Jana Freytag
- Jay Campbell
- Jir Shin Boey
- Mark Arnold
- Maike Osters
- Felix Hemme
- Kristen Wilson
- Aaron Neslin
- Lindsey Lowry
- Chulin Meng
- Lindsey Taggart

Goals

Discussion items

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**Demo of acquisitions apps**

- **Organizations App**
  - Configurations of Organizations - Categories - controlled vocabulary. Needs to be added for display in Orgs app. How your organize your contact information. Can have categories not used by Organization, if category is added to org info, category will display in the record view.
  - Three states of Org - Active, Inactive, Pending. System will prevent opening of Orders that have Inactive or Pending orgs. Idea is that Active orgs can be used by other apps.
  - Organization can be "vendor" or "organization"
  - Choosing "vendor" changes fields available: adds vendor information, terms, EDI info, accounts accordions

**Finance App**

- Start from left to right as far as setting up the structure.
- **Settings** - Fund types - intended to be used to help organize funds, and used during Fiscal Year Rollover.
- **Fiscal Year** - code is really important - the alpha characters becomes a series, and the year is the year identifier. Intention is that the FYRO functionality will allow users to "set it and forget it" - user creates series and fiscal years, and FYRO takes care of the rest.
- **Ledger** - "Fiscal year one" field - does not need to be first year or current year, but it's how you associate a fiscal year series to a ledger.
- **Groups** not required, a way to organize and report on funds. Comes before fund, because you can associate a fund with a group during create/edit.
- **Funds** - management and control of money. Can only be associated with one ledger (ledger points back to fiscal year series). External account number - identifies your account number in institution's central accounting software. If you have any money, orders, allocations connected to budget for a fund, you can't delete that fund. You may want to wait and create budgets last, or not allocate to the budget until ready.
- **Group** will separate viewing of different ledgers on different fiscal year series

**Orders App**

- When creating orders (even migration) if you have fund information in your orders, the funds are referenced. Create organizations and funds first.
- **Settings** -
  - can set up templates for orders - captures both order and purchase order lines if desired.
  - can require approvals (by default it's off) - requires order to be approved before it can be opened (permission required).
  - Closing Orders - reasons order may be closed
  - Inventory Interaction Defaults - can be changed for each order
  - Inventory requires status, type and loan type - pulls from Inventory lists
  - Purchase order lines limit - must be > 0 and < 1000
  - Opening purchase order default for "save and open" purchase order
  - PO number - user can edit, prefixes, suffixes associated with orders
- **Creating an Order**
  - Can assign an order to a user, to pass responsibility on in workflow, or to generate notifications (will be talking more about notifications in RM soon)
  - Manual - if checked, can be excluded from any automatic processes.
- **Re-encumber** - activated during FYRO. If not checked order would not be re-encumbered.
- **PO Line** - Can be connected to instance in inventory.
  - Acquisition Method -
  - Physical Format
  - Physical Resource Details - important - can integrate with Inventory module, and create instance, order, holding, item records. If manually entered title and Product ID, system will automatically try to find an existing instance. If doesn't exist, will create. Affects receiving actions.
  - Fund Distribution - fund has to be active, and money must be available when assigning to a fund. Only makes encumbrance when opening the order.
  - Cloning an order makes it a pending order, not an active order.
- When you click "Package", Title becomes package name, can have product IDs, receiving notes, can be physical/electronic/other - Will have to manually add pieces for receiving. Container records are still a possibility, but not implemented yet. At the moment, there isn't an interaction between "Package" and inventory yet, but there is with titles in the package.
  - **Receiving** - For packages you would need to create a new title, but create new instance is determined by POL "create inventory" setting. Using Package POL will link title to package name.

**Action items**

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