Date
18 Oct 2019

Attendees

- Kristin Martin
- Susan Martin
- Nancy Pelis
- Caroline Schmunck
- Eric Hartnett
- Charlotte Whitt
- William Verner
- Julie Brannon
- Kristen Wilson
- Martina Tumulia
- Abigail Wickes
- Tim Whisenant
- Ann-Marie Breaux
- Felix Hemme
- Owen Stephens
- Dennis Bridges
- Nicole Trujillo
- Ann Crowley
- Bill Verner (Duke)
- Sara Colglazier

Discussion items

<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
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<tbody>
<tr>
<td></td>
<td>Minute taker?</td>
<td>Eric Hartnett (first half)</td>
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<td>Abigail Wickes</td>
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<tr>
<td>5 min</td>
<td>Updates and Announcements</td>
<td>Kristin Martin</td>
<td>WOLFCon registration is opening up very soon. More information coming. Some discussion of support for functionality not in MVP. Cornell and Chicago are collaborating with Index Data to work on importing from OCLC.</td>
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| 40 min | ISBN Handling | Ann-Marie Breaux | ISBN search is implemented in Inventory but it's currently not sufficient. There is currently ISBN-13 and ISBN-10 with or without hyphens. If hyphens are not in the record, they are not found. The expectation is that an ISBN search will search both valid and invalid ISBN identifier types. Also, the search should ignore hyphens, both in the search and in the stored values. The search also ignores cases with a terminal “X”. There is a question of whether a keyword search would include the ISBN field. Finally, the expectation is that the search will only search data in our records and will not calculate ISBN-10 from ISBN-13. However, the RA SIG would like the ISBN-10 calculated. Question: should the keyword search ISBN? Response: keyword should be as unspecific as possible.

ISBN functionality in Orders will be slightly different. When a MARC record is turned into an Inventory record, there’s a mapping feature which adds certain fields to identifier type fields. E.g., ISBN, OCLC, etc. When creating an order and adding a PO line from a record in Inventory, the qualifier subfield comes over as a separate field from the product ID. Product identifiers will be deduplicated. Orders does normalize Product IDs. Orders does not pull invalid ISBN fields from Inventory. Orders will always convert an ISBN-10 to an ISBN-13 always, regardless of whether the record has an ISBN-13 or not. There is concern about the automatic conversion of ISBN-10 to ISBN-13 in relation to special collections. Ann-Marie says they’ll revisit if they need to.

| 45 min | Migrating ongoing orders | Anne L. Highsmith | TAMU working on migrating over 17K POs for continuations; discussion of assumptions/migration choices

**Link to Presentation**

- **Note:**
  - Don’t mind display problems in this instance
  - Merging two libraries as part of migration (main library and medical sciences library); some PO numbers therefore have database codes in front; will only keep where necessary
  - Question of whether setting Manual Renewal to TRUE would avoid automatic renewals; Dennis Bridges (DB) confirmed these fields are just informative, no functionality at this point
  - Comment from TAMU that setting to Order status to open vs. pending leads to lack of ability to edit in some places
  - Sara Colglazier (SC); recent demo noted open order can’t be “un-opened”
  - DB: close order at that point (for any given reason)
  - Jon Miller (JM); test order automatically closed for some reason—A-MB confirmed this shouldn’t happen
  - Looking at the PO Line Details, TAMU commented “Continuation” type from Voyager didn’t have obvious mapping in FOLIO Acquisition Method; hence they are using “Purchase”
  - Question from A-MB about bringing in historic data; lots of positive feedback on the importance of using History data from last 5-10 years to prove something was paid for (TAMU noted they will keep copy of Voyager database with this in mind)
  - Anne-Marie Breaux (A-MB) comment: migrated Vendor Reference Numbers can also be a searchable field
  - DB question: how were date fields considered, e.g. Date Ordered?
    - TAMU A: tried to bring in Date Ordered; after extracting from Voyager, casting to UTC
    - DB: may be applying its own dates when creating order
    - Lots of feedback on preference for original Date Ordered rather than date populated based on migration date

Heather Thoele (HT) Presentation Comparing Voyager and FOLIO functionality with migrated data

- **Re: formats–difficult to tell in FOLIO which data represents Online**
- In Voyager, 155 POs with “Membership as title; many of them do not include organization name in 245; workflow has been to search for these records using organization name in “Other” search
- In FOLIO, using vendor reference number brought up everything associated with Membership
- **Package POs transferred over with very little information; PO line doesn’t say what Package it is, just ties together with Vendor Reference Number**
- Hard to tell which order is which in FOLIO in terms of print/online, location:
  - Inventory probably better place to track what’s owned; Orders to track what’s paid:
  - In FOLIO, after click Receive button from PO line only barcode pops up—would be better to get more options (e.g. volume number, year…)
  - A-MB: checkbox at beginning to discern Check-in vs. Receive
  - TAMU noted need for multiple temporary locations for incoming issues before they get bound; doesn’t seem like this will transfer over very easily into FOLIO as is

**Additional Comments/Questions**

- Smith College would like a Note field in the Renewal field
  - DB: confirmed it is coming
- A-MB/DB: will look into updates in columns
- A-MB: when Orders and Inventory are sufficiently populated it’s much easier to see how things scale outside of demo/testing environments
- A-MB: Planning to have separate acquisitions units for Med and Main, or plan to put Acquisitions together?
  - AH/HT: TBD; Med may be separate, but there’s lots of overlap, shared invoices… some shared PO numbers will no longer be necessary

| **Action items** |