Agenda and Meeting Notes

The Acquisitions Group Meets via Zoom every **Tuesday 1-2pm Eastern U.S. time and every other Friday 9-10am Eastern U.S. time.**

**TUESDAY MEETING ZOOM LINK**

Join from PC, Mac, Linux, iOS or Android:  [https://zoom.us/j/353648867](https://zoom.us/j/353648867) Meeting ID: 353 648 867.

One tap mobile: +16468769923,,353648867# US (New York)  +16699006833,,353648867# US (San Jose)

Dial by your location : +1 646 876 9923 US (New York)  +1 669 900 6833 US (San Jose)  or  Find your local number:  [https://zoom.us/u/adpH5ITcgX](https://zoom.us/u/adpH5ITcgX)

**FRIDAY MEETING ZOOM LINK**

Join from PC, Mac, Linux, iOS or Android:  [https://zoom.us/j/675766727](https://zoom.us/j/675766727)

See [FOLIO meetings with Zoom](https://zoom.us/j/675766727) for more information on how to connect.

Or mobile phone one-tap (US Toll):  +16465588656,675766727# or +14086380968,675766727#

Or Telephone:

Dial: +1 646 558 8656 (US Toll) or +1 408 638 0968 (US Toll)

Meeting ID: 675 766 727

International numbers available:  [https://zoom.us/zoomconference?m=Uz8gOxV-yqHRNcWlZKa4trK_0dP7WPlp](https://zoom.us/zoomconference?m=Uz8gOxV-yqHRNcWlZKa4trK_0dP7WPlp)

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Find recordings of recent meetings on our Google Folder:  [https://drive.google.com/drive/folders/1QGv745JZIpUhrPqrRcooQMNZ44roMPXK](https://drive.google.com/drive/folders/1QGv745JZIpUhrPqrRcooQMNZ44roMPXK) and for 2022 onwards:  [https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/](https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/)

Notes for meetings prior to March 23, 2021 are available [here](https://recordings.openlibraryfoundation.org/folio/acquisitions-sig/).

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**Upcoming: Tuesday, March 15, 2022**

**Current: Friday, March 11, 2022**

**Housekeeping -**

- Reminder -Lotus Bugfest scheduled for March 14 - March 25. Please participate if you can!!
- Bugfest training videos - [Helpful Resources](https://wiki.folio.org/pages/viewpage.action?pageId=73535930)

**PC Updates (Kristin Martin)**

- 2022-03-10 Product Council Meeting notes/SIG Conveners Meeting
  - More to volunteer for BugFest

**Business/Implementer's Topics**

- Demo - staff slips by Julie Bickle (LMU, FOLIO PM + PO Patron Notices and Staff Slips. Thank you, Julie!!)
- Discuss possible similar functions and data points between staff slips and previously discussed a printable "workslip" see [https://wiki.folio.org/pages/viewpage.action?pageId=73535930](https://wiki.folio.org/pages/viewpage.action?pageId=73535930) for more info. Robert Roose
- Implementer's Topics - discuss #33 and continues if time permits -- see Implementer's Topics list for more details - [Acquisitions/Resource Management implementers](https://wiki.folio.org/pages/viewpage.action?pageId=73535930)

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**Tuesday, February 8, 2022**

**Housekeeping –**
• Reminder - we’ll meeting this Friday, March 11

Business –
• Discuss Manage Voucher Export without needing to access settings.
• Searching invoices by amount - should this be done by range instead?
• If time allows, continue to discuss topics on Implementer’s Topics list from where we left off on Feb. 25 - Acquisitions/Resource Management implementers)

(No meeting during the week of Feb. 28 - March 4)

Friday, February 25, 2022

Housekeeping -
• No meeting next week (Feb. 28 – March 4)
• Next meeting, Tuesday, March 8 at 1 pm
• Acquisitions SIG wiki page update

PC Updates (Kristin Martin)
• Updates from Data Sync Working Group (they presented here too)
• Considering how to manage meetings and input across the global - new cross-council group investigating (Sharon Wiles-Young, Anya Arnold, Peter Murray, Mike Gorrell)
• Updates from the other councils
• documentation updates - now with versioning: https://iris.docs.folio.org/docs/

Business/Implementer’s Topics
• Discuss Implementer’s Topics starting #25 and continue as time allows - (#25 - #29 are invoice related topics) – details see Implementer’s Topics list - Acquisitions/Resource Management implementers)

Tuesday, February 22, 2022

Housekeeping –
• Reminder - we’ll meeting this Friday, February 25
• Reminder - no meeting next Tuesday, March 1
• Both Acquisitions SIG Calendar and Community Calendars have been updated with our current Tuesday/Friday meeting schedule

Business –
• Summarize the discussion re: “exporting adjustment details in voucher summary” from last Tuesday
• Highlights of the Lotus release (10 minutes)
• Discuss #25 & #26 (and continue if time allows) both invoice related from Implementer’s topics list (details see the list - Acquisitions/Resource Management implementers)

Tuesday, February 15, 2022

Housekeeping -
• Friday meetings schedule update
• Cancel Tuesday March 1 meeting?! (Dennis is away that week)

Business -
• Discuss Implementers Topics #23 and #24 (link to Acquisitions/Resource Management implementers)
• Discuss exporting adjustment details in voucher summary
• Highlights of the Lotus release (10 mins)

Tuesday, February 8, 2022

Housekeeping -
• reminder please respond to the poll regarding changing Friday meetings schedule if you haven't done so already

Business -

• Summary of MODFISTO-283 discussed last Friday
• Data sync questions re: the acceptable delay for data to be in sync across apps Martina Schildt
• Discuss the display of Item status in receiving - https://issues.folio.org/browse/UIREC-214
• Highlights of the Lotus release
• If time permits, discuss Implementer’s Topics #23 (carried over from last Friday’s meeting) see Implementers topic list link here - Acquisitions /Resource Management implementers

Friday, February 4, 2022

PC Update (Kristin Martin)

• 2022-01-27 Product Council Meeting notes
  • Creation of Long-Term release postponed, return to discussion at the end of 2022
• 2022-02-03 Product Council Meeting notes
  • Presentation on new authority control functionality
  • Need for more product owners, helping to get developers integrated into project

Business -

• Continue to discuss Display "Rush" in receiving and on invoice - review UXPROD-3179
  • UXPROD-3179 - Carry POL 'rush' indicator to corresponding receiving records and invoice lines OPEN
• Discuss if current over-encumbered is calculated as expected.
  • MODFISTO-283 - Over encumbrance calculation not aligned with encumbrance limit calculation CLOSED
• Highlights of the Lotus release (Dennis B.)

Implementer’s Topics (regular Friday topic)

#23 on the list - Invoices: voucher generation process feedback (see link below for Implementers Topics list)

Acquisitions/Resource Management implementers

Tuesday, February 1, 2022

Housekeeping -

• Please rank UXPROD-3435 - Export invoice data in delimited file format IN REFINEMENT if possible particularly if this is a very important feature for your library
• Reminder - we are meeting this Friday, Feb 4, 2022 at 9 am EST

Business -

• Update on the EDIFACT order UAT (Dennis B.)
• Discuss use cases for deleting receiving records
• Display "Rush" in receiving and on invoice - review UXPROD-3179
  • UXPROD-3179 - Carry POL 'rush' indicator to corresponding receiving records and invoice lines OPEN

Tuesday, January 25, 2022

Business -

• Continue to discuss review order/invoice export to csv requirements
• Discuss UXPROD-3525 - Extend Piece "Receiving history" information from holdings display to public display DRAFT Please rank if possible as it’d be very helpful to know how important this feature is for your library
• Discuss another implementer topic from Acquisitions/Resource Management implementers list if time permits
Friday, January 21, 2022

PC Update (Kristin Martin)

2022-01-13 Product Council/SIG Conveners Meeting notes
- Review for SIG Conveners update
- New prioritization system under development

2022-01-20 Product Council Meeting Notes
- Action setting with SWOT analysis
- Finalizing Roadmap presentation and will want further input from SIGs

Business --
- Discuss MODINVOICE-328 - Allow editing of subscription dates after an invoice is paid
- How many of you will have more than 1000 pieces for a single title in receiving? https://issues.folio.org/browse/UIREC-191
  -- Describe use cases
- Review order/invoice export to csv requirements

Tuesday, January 18, 2022

Housekeeping
- Reminder - please participate if you can “EDIFACT order export UAT” (scheduled for 1/18/22 - 1/20/22)

Business
- EDIFACT (reserves 15 minutes Ann-Marie Breaux)
  - CONTINUE to discuss allowing users to edit invoice subscription dates after the invoice is approved or paid

Tuesday, January 11, 2022

Housekeeping
- New Convenor!

Business
- EDIFACT order user acceptance testing
- Follow up questions from Dennis Bridges regarding the discussion on additional use cases for canceling orders
  - CONTINUE to discuss allowing users to edit invoice subscription dates after the invoice is approved or paid

Friday, January 7, 2022

Housekeeping
- Still seeking a new Convener in January 2022. As mentioned, we have a person who is tentatively willing, but would like others to have a chance to volunteer. If you are willing and able to volunteer, please contact Susan Martin, Heather McMillan, and Dennis Bridges no later than Friday, January 7, 2022 via direct message in Slack. If I do not receive any volunteers, I will see if our tentative person is still willing.

I (Susan) will be stepping down as convener. My last day will be January 25, 2022. I am seeking a person to be convener work with Heather and Dennis. Duties include (but may not be limited to) agenda wrangling and upkeep, meeting moderation, attending App Interaction SIG, and representing Acq SIG when necessary on the SIG conveners group and with PC. Heather is fabulous and is the co-convener. She takes care of the notes and provides assistance and back-up, as well as attending the other groups as well. Dennis is simply lovely to work with, and all and all it’s a sweet gig, and a great way to give to the project.

Updates

PC Update (Kristin Martin) : Just one PC meeting since the last Friday meeting: 2021-12-16 Product Council Meeting notes
- We are finalizing the Roadmap and need to update the wiki page with the new information
- Also reviewed the results of an implementer’s SWOT Analysis
Implementer’s Topics

#22 on the list “Orders: Inconsistent terminology between filters, detail pane, and .csv export for “Date opened”” Julie Brannon

Acquisitions/Resource Management implementers

Business

- Follow up questions from Dennis Bridges regarding the discussion on additional use cases for canceling orders
- CONTINUE to discuss allowing users to edit invoice subscription dates after the invoice is approved or paid
- Discuss “Release encumbrances” for Ongoing orders

Tuesday, January 4, 2022

Housekeeping

- We will meet on Friday, January 7, 2022.
- Still seeking a new Convener in January 2022. As mentioned, we have a person who is tentatively willing, but would like others to have a chance to volunteer. If you are willing and able to volunteer, please contact me, Heather, and Dennis no later than Friday, January 7, 2022 via direct message in Slack. If I do not receive any volunteers, I will see if our tentative person is still willing.

I (Susan) will be stepping down as convener. My last day will be January 25, 2022. I am seeking a person to be convener work with Heather and Dennis. Duties include (but may not be limited to) agenda wrangling and upkeep, meeting moderation, attending App Interaction SIG, and representing Acq SIG when necessary on the SIG conveners group and with PC. Heather is fabulous and is the co-convener. She takes care of the notes and provides assistance and back-up, as well as attending the other groups as well. Dennis is simply lovely to work with, and all and all it's a sweet gig, and a great way to give to the project.

Business

- Discuss additional use cases for canceling orders
- Discuss “Release encumbrances” for Ongoing orders
- Discuss allowing users to edit invoice subscription dates after the invoice is approved or paid

Tuesday, December 28, 2021 - Canceled

Friday, December 24, 2021 - Canceled

Tuesday, December 21, 2021 - Canceled

Tuesday, December 14, 2021

Housekeeping

Seeking a new Convener in January 2022. I (Susan) will be stepping down as convener. My last day will be January 25, 2022. I am seeking a person to be convener work with Heather and Dennis. Duties include (but may not be limited to) agenda wrangling and upkeep, meeting moderation, attending App Interaction SIG, and representing Acq SIG when necessary on the SIG conveners group and with PC. Heather is fabulous and is the co-convener. She takes care of the notes and provides assistance and back-up, as well as attending the other groups as well. Dennis is simply lovely to work with, and all and all it's a sweet gig, and a great way to give to the project.

If anyone is interested, please reach out to us. We also welcome questions about the position.

Topics

- Updated mocks or Display a history of edits for the order record
- Discussion around canceling orders. Are their use cases for "unc-canceling: an order or order line"

Friday, December 10, 2021

Housekeeping

Meeting schedule for the rest of 2021 - Last meeting of 2021 will be Tuesday, December 14th. We will resume our meetings on Tuesday, January 4, 2022.

Updates

- PC Updates: SIG update from 2021-12-09 meeting.
- New process for reviewing modules: PC review from a functional standpoint and then passes on to TC for review from technical side
- Need new Product Owners for the following areas
  - Loans, Check-in, Check-out, Loan information on Item Details (interim - Cheryl Malmborg)
  - Requests (interim - Brooks Travis)
  - Item State (interim - Charlotte Whitt)
Courses (interim - Charlotte Whitt)

• Support SIG is looking for more members! Check with Anya Arnold.

Implementers Topics (regular Friday topic)

We are going to go back and start covering the topic beginning with #14 and onward. We are allocating 30 minutes with a hard stop on these.

• #14 "Cover records" submitted by Sara Colglazier from the page.

Regular topics

• Updated mocks or Display a history of edits for the order record
  • Discussion around canceling orders. Are their use cases for "unc-canceling: an order or order line?"

Tuesday, December 7, 2021

• Navigating Invoices discussion
  • Updated mocks or Display a history of edits for the order record
  • Discussion around canceling orders. Are their use cases for "unc-canceling: an order or order line?"

Tuesday, November 30, 2021

• EDIFACT invoice discussion - Ann-Marie
  • Usability question regarding managing fund grouping from the group record

Tuesday, November 23, 2021

• WolfCon 2022 - Acq SIG discussion WolfCon 2022 Acq SIG brainstorming
  • EDIFACT invoice discussion - Ann-Marie
  • Should PO template show hide apply when viewing orders or just editing. Are there use cases for hiding the field during both view and edit?
  • Usability question regarding managing fund grouping from the group record

Tuesday, November 16, 2021

• Smoke Testing for Kiwi
  • WOLFCon 2022 - Acq SIG discussion (15 minutes)
  • Presentation of handling of subscriptions using prediction patterns (Peter Sbrzesny and Martina Schildt)

Friday, November 12, 2021

Housekeeping

• Friday, November 26th meeting will be canceled due to the US Thanksgiving holiday.
• Survey on Acquisitions SIG management: please take some time to complete this survey regarding the Acquisitions SIG. Dennis, Heather, and Susan are interested in knowing your thoughts in order to improve. It should take about 15 minutes of time. The survey is set to close on 11/20/2021, so please do it this up-coming week! Thanks.
• The survey is available here: https://mtsu.ca1.qualtrics.com/jfe/form/SV_7VJuSkW7SL51w90 and was posted on the Slack channel as well.

Updates

• PC Update
  • Meeting notes 2021-11-04
  • Meeting notes 2021-11-11
  • Some new working groups
    • Criteria for Accepting Code
    • Community Input and Prioritization Working Group
  • SWOT Analysis for Implementers
  • WOLFCon 2022 - need for SIG input

Topics

• EDIFACT invoices and Kiwi (Ann-Marie) (20 minutes hard stop)
• Presentation of handling of subscriptions using prediction patterns (Peter Sbrzesny and Martina Schildt) 30 minutes or to the end of the hour

Implementers Topic (15 minutes hard stop - if there's time)

• Topic #15 packages (submitted by Sara Colglazier).
Tuesday, November 9, 2021

- Review and confirm the details of displaying acquisition information on Item records. [UXPROD-1995 - Item: Display of POL number, Order status, Order date and Price in the Acquisition accordion](https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10)
- Continue to review receiving enhancement mock-ups [https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10](https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10)
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor [https://wiki.folio.org/pages/viewpage.action?pageId=73535001](https://wiki.folio.org/pages/viewpage.action?pageId=73535001)

Tuesday, November 2, 2021

- Review and confirm the details of displaying acquisition information on Item records. [UXPROD-1995 - Item: Display of POL number, Order status, Order date and Price in the Acquisition accordion](https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10)
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Friday, October 29, 2021

**Updates**

- PC Update - 5 minutes
- Bulk Edit Update - 5 minutes
- EDIFACT invoices and Kiwi (Ann-Marie) - 20 minutes

**Implementers Topics**

We are going to go back and start covering the topic beginning with #14 and onward. We are allocating 15 minutes with a hard stop on these.

- #14 “Cover records” submitted by Sara Colglazier from the page.

**Regular business**

- Continue to review receiving enhancement mock-ups [https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10](https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10)

Tuesday, October 26, 2021

- EDIFACT related questions from the dev team
- Continue to review receiving enhancement mock-ups [https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10](https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10)
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Tuesday, October 19, 2021

- Continue to review receiving enhancement mock-ups [https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10](https://docs.google.com/presentation/d/1uMGr1_HJ2yVzcJq_fTgUlibOmf8O7_SZlQCyyx4MdVc/edit#slide=id.gf8b007a9f0_0_10)
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Friday, October 15, 2021

- PC Update
  - Meeting minutes 2021-10-14
  - Meeting minutes 2021-10-07
  - FOLIO Open Community Meeting
  - Volunteer for BugFest!
- "Workslip" functionality from notes - see Slack conversation from 9/22/2021 10:53 am and continuing
- Review receiving enhancement mock-ups
- Continue display acq information on instance conversation from Tuesday,
- Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor
Parking Lot Items

- Review and discuss "Date ordered" behavior when user unopen and reopen orders. Dennis will work on a story for the approval date that we can approve as a group. 8/24
- Discuss the ability to export country as name rather then code in the voucher export. Defer topic till December.
- Vouchers batch export question: I’ve noticed that Invoice Date is not included in the invoice voucher file generated by the batch export process. That data element is expected by Duke’s AP system. A voucher date is included on the file, but the voucher date and invoice date will not likely be the same. [https://wiki.folio.org/x/zgQGAg](https://wiki.folio.org/x/zgQGAg)
- Discussion on the note app functionality in Acq

All Meeting Notes

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Find more results

2021-03-23 Acquisitions Group Meeting Notes

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One tap mobile: +16468769923 US (New York) +16699006833 US (San Jose)
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Find your local number: https://zoom.us/u/adpH5ITcqX

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Meeting ID: 675 766 727
International numbers available: https://zoom.us/zoomconference?m=Uz8gOxV-yqHRNcWIZKa4trK_0dP7WPVo

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Notes for meetings prior to March 23, 2021 are available here.

Up-Coming: Tuesday, October 19, 2021
• EDIFACT invoices and Kiwi (Ann-Marie) - 20 minutes (hard stop)

CURRENT: Friday, October 15, 2021
• PC Update
  • Meeting minutes 2021-10-14
  • Meeting minutes 2021-10-07
  • FOLIO Open Community Meeting
  • Volunteer for BugFest!
• "Workslip" functionality from notes - see Slack conversation from 9/22/2021 10:53 am and continuing
• Review receiving enhancement mock-ups
• Continue display acq information on instance conversation from Tuesday.
• Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor

Tuesday, October 12, 2021
• Display acq information on instance
• Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor
• Discuss adding Acquisitions Method for category "free"

Tuesday, October 5, 2021
• Continue UAT Receiving results
• Display acq information on instance
• Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor
• Discuss adding Acquisitions Method for category "free"

Friday, October 1, 2021
• PC Update - Kristin Martin
  • Minutes from 2021-09-23 and 2021-09-30
• Continue UAT Receiving results
• Display acq information on instance
• Discuss adding a field or indicator to identify Consortium purchases separate from Organization/Vendor
• Discuss adding Acquisitions Method for category "free"
Tuesday, September 28, 2021
- UAT Receiving results
- "Workslip" functionality from notes - see Slack conversation from 9/22/2021 10:53am and continuing - NOT COVERED
- Question: Does it make to remove case sensitivity for acquisition units? I.e. should law, LAW or Law always be considered the same name?
- Continue Discussing renewal integration (Ongoing order information) - NOT COVERED

Tuesday, September 21, 2021
- Discuss displaying invoice line amount on POL instead of invoice amount (discussed in meeting)
- Discuss instance matching (discussed in meeting)
- Continue Discussing renewal integration (Ongoing order information)
- EDI Orders

Friday, September 17, 2021
- PC Update - 10 minutes Kristin M.
  - PC Meeting Minutes: 2021-09-09
  - PC Meeting Minutes: 2021-09-16
- Bulk Edit Presentation - 20-30 minutes Magda
- UAT Receiving Testing
- Order renewal integration (see Dennis’s poll in the channel)
- EDI Orders

Tuesday, September 14, 2021 - CANCELED

Tuesday, September 7, 2021 - CANCELED

Friday, September 3, 2021
Housekeeping
- Tuesday, September 7, 202, 1pm Eastern time meeting is CANCELED

Updates
- PC Update 9/2 and PC Update 8/26 - Kristin Martin (10 minutes)

Business (some old and some new) Dennis (50 minutes)
- Upcoming Receiving UAT
- Discussion around this question: If we replace the piece "Caption" field with copy number, enumeration and chronology. Which of those new fields should be populated with your current piece Caption field information?
- EDI Orders (again)

Parking Lot Items
- EDI Orders
- Review and discuss "Date ordered" behavior when user unopen and reopen orders. Dennis will work on a story for the approval date that we can approve as a group. 8/24
- Discuss the ability to export country as name rather then code in the voucher export. Defer topic till December.
- Vouchers batch export question: I’ve noticed that Invoice Date is not included in the invoice voucher file generated by the batch export process. That data element is expected by Duke’s AP system. A voucher date is included on the file, but the voucher date and invoice date will not likely be the same. https://wiki.folio.org/x/zgQGAg
- Discussion on the note app functionality in Acq

All Meeting Notes
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Find more results

2021-03-23 Acquisitions Group Meeting Notes