

Display Acquisitions Information on Instance and Item record in Inventory

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Problem(s):

1. Identify the status of all related orders for a specific title requires too many clicks if user needs to navigate to Holdings.
2. Identifying what other users/units have order the instance already.
3. For someone with only cataloging permissions it can be difficult and time consuming to retrieve acquisition information from ACQ apps.

Instance - Use Cases & Requirements:

Requirement	Status	Use cases
Include a column for Order status Include a column for Location	VERIFIED	<ul style="list-style-type: none"> • Being able to quickly identify the status of pending, open or closed orders for a specific title and also to see what location they relate to. This would allow user to quickly see if someone else is already planning to order, has ordered, or is waiting for an order to be filled for this title.
Include a column for Acquisition unit	VERIFIED	<ul style="list-style-type: none"> • For libraries that leverage acquisition units it would be ideal to see that data on the instance with order info. Making it clear whether other institutions in the system have already ordered something.
POL number is hyperlink. Clicking it takes user to the POL view in the orders tab of the orders application	VERIFIED	<ul style="list-style-type: none"> • Important to show POL number as a hyperlink so it is easy to retrieve more information if user has permission to
Include column for Date ordered Include column for Order type Include column for Receipt date	VERIFIED	<ul style="list-style-type: none"> • Need to be able to identify when the order was sent, what type of order it is and what the receipt status is.

Item - Use Cases & Requirements:

Requirement	Status	Use cases
POL number is hyperlink. Clicking it takes user to the POL view in the orders tab of the orders application	VALIDATED	<ul style="list-style-type: none"> • As a circulation staff I want to have easy access to order information relevant for any given search in Inventory. When I find what I'm looking for - the given patron request - then I want to have easy access coming from the Inventory, item record and do not want to repeat my search in another app, e.g. the the Order app. • Where searching criteria is different seeing information from acquisitions in inventory may allow you to find acq information more efficiently than you could by searching orders directly.
Include column for POL Receipt Status	VALIDATED	Receipt status of the POL may not indicate that the actual piece related to this item has been marked as received.
Include column for Acquisition unit	INVALID	Generally there are other data points at the item level that clearly communicate which group is responsible for an item. Location, holding etc.
Include column to Display Vendor code	VALIDATED	I may have items on the same instance ordered through different vendors

Include column for Subscription Y/N	VALIDATED	Investigating whether this was a firm order or a standing order. Helpful to see Subscription Y/N so that user knows whether an ongoing order is a standing order vs. subscription. This may change the way they follow up on the order.
Include column for "Piece Receipt date"	VALIDATED	When viewing the item it would be helpful to see when something has been received. Specifically that item not the POL in general. This also implies whether it is expected or not.
Provide hyperlink to the receiving history	VALIDATED	To make it easier to access receiving information and confirm what other "Pieces" have been received. Prevent the need for users to go and run a separate search in the receiving app

Proposed workflow:

- Display Acquisition accordion on Instance record
- Populate accordion with order information from all POLs that contain a reference to that instance. I.e. All POLs connected that that instance

The screenshot shows the 'Inventory' system interface. The main content area displays an instance record for 'Transparent water - Ois Records, [2017]'. The interface includes a search filter on the left, a list of contributors, and an acquisition accordion. The acquisition accordion is currently collapsed, showing only the title and staff notes.

- Display Acquisition accordion on Item record
- Populate accordion with order information from Piece that contains a reference to that Item.

The screenshot shows the 'Inventory' system interface. The main content area displays an item record for 'On order'. The interface includes a search filter, a list of enumeration data, and an acquisition accordion. The acquisition accordion is currently expanded, showing a table of acquisition records.

POL number	Order status	Order sent date	POL receipt status	Piece receipt date	Organization code	Order type	Subscription
10000-2	Open	11/30/2022, 9:11 PM	Awaiting receipt	11/21/2021, 2:00 PM	AMA	One-time	No

Questions for Users:

Question	Status	Conclusion	Comments
	OPEN		

Questions for Vendors:

Question	Status	Conclusion	Comments
	OPEN		

Questions for Developers:

Question	Status	Conclusion	Comments
	OPEN		

Work Breakdown Structure:

Features:

UXPROD-3344 - Getting issue details... STATUS

UXPROD-1995 - Getting issue details... STATUS

UI Stories

MOD Stories