



# FOLIO Acquisitions

Where are we now and where are we going?

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# What's in it for you?

- I want to clarify what apps make up FOLIO “Acquisitions”
- I want to walk through some of the key features of these apps that you can play with right now focusing on integration
- I will do my best to briefly summarize our short term and longer term development plan for each app
- I want you to have a clear picture of where we are now, where we are going and where you could contribute your knowledge and expertise

# Acquisitions Apps



Vendors



Finances



Receiving



Invoices



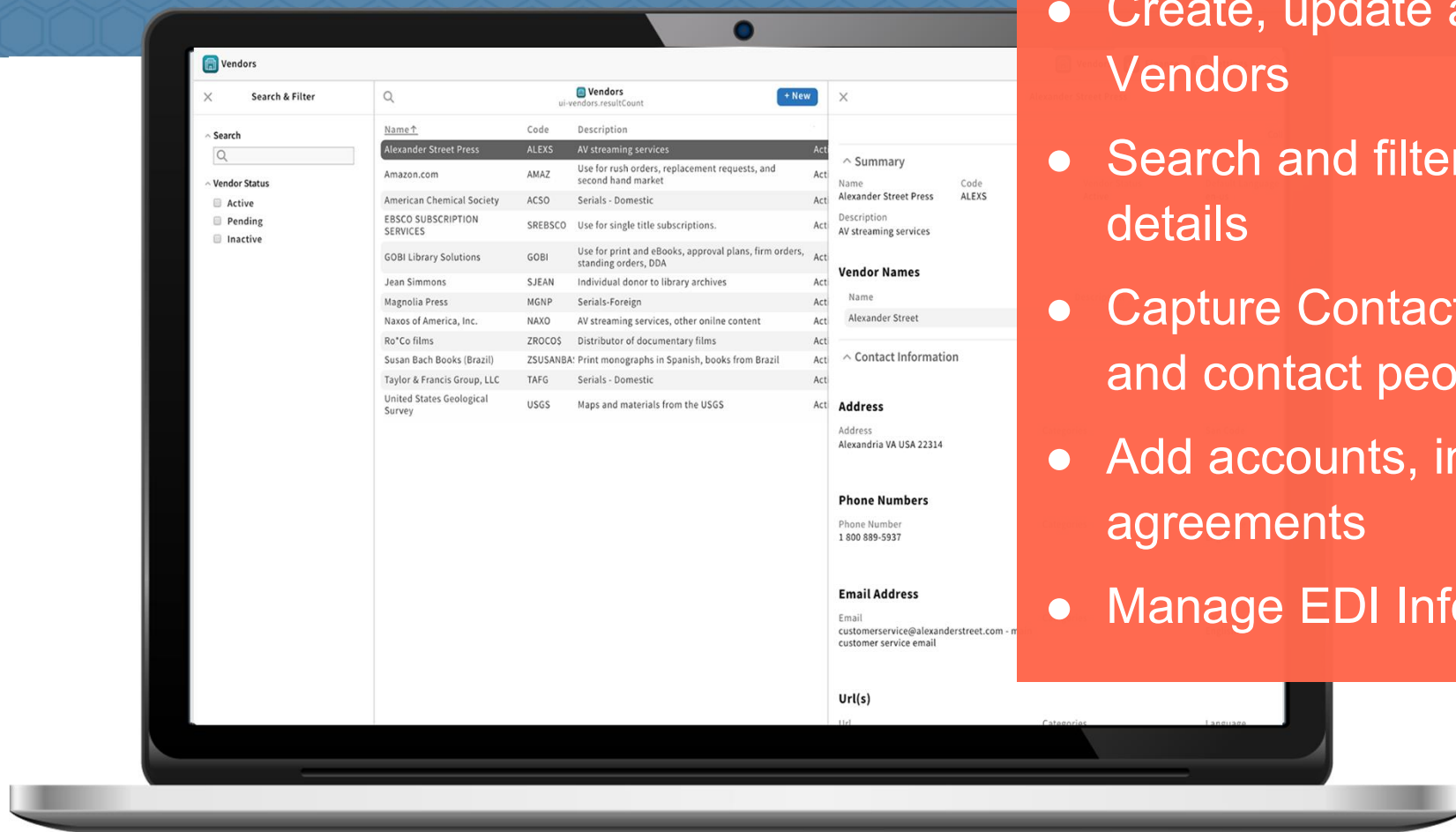
Orders



Vouchers

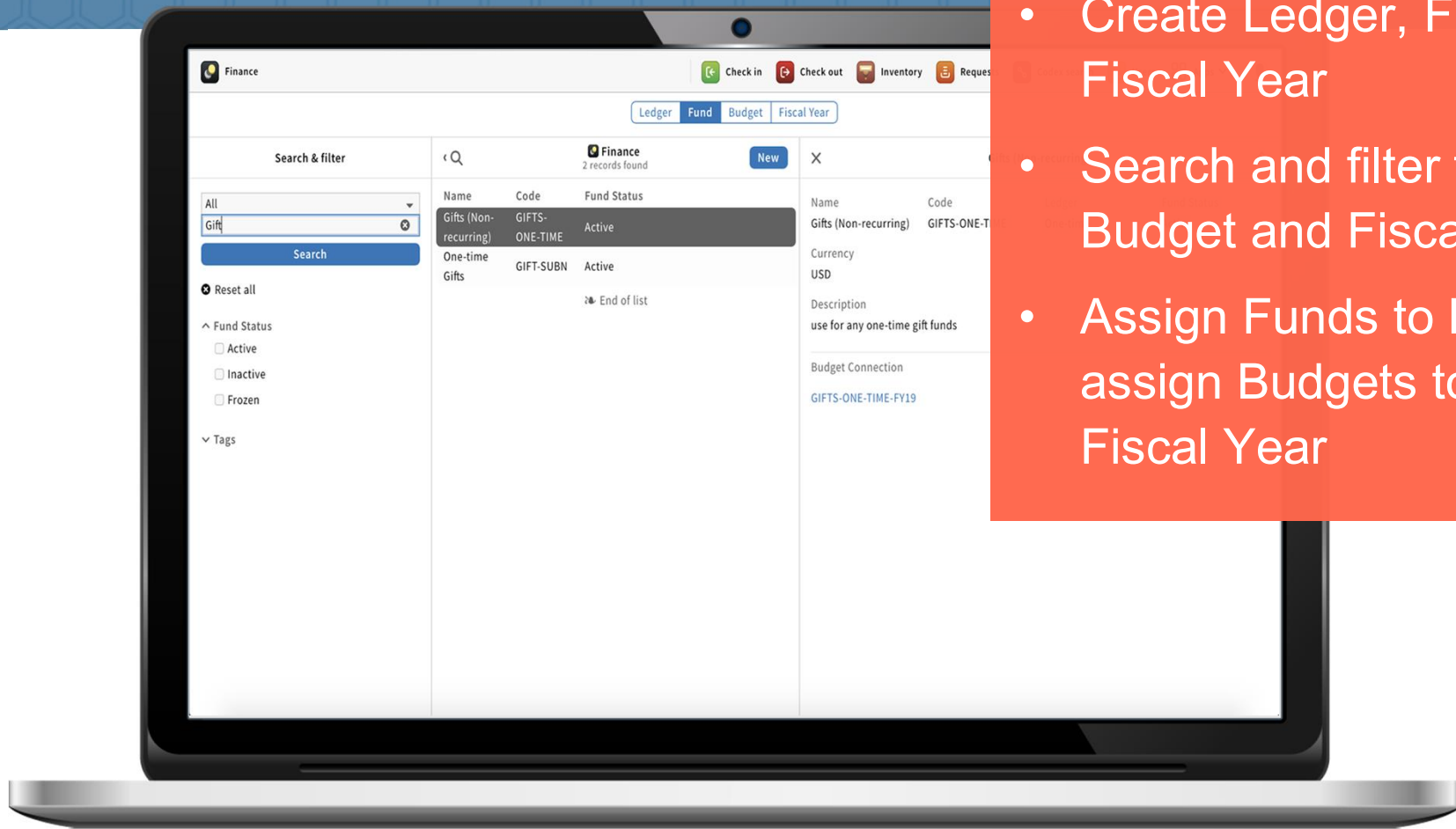
- What we referring to as “Acquisitions” is made up of 6 separate Apps
- Two of these apps may not have their own ui-modules (Receiving and Vouchers)
- Each are intended to function independently of each other but combined to provide a customizable workflow for acquiring materials

# Vendors App



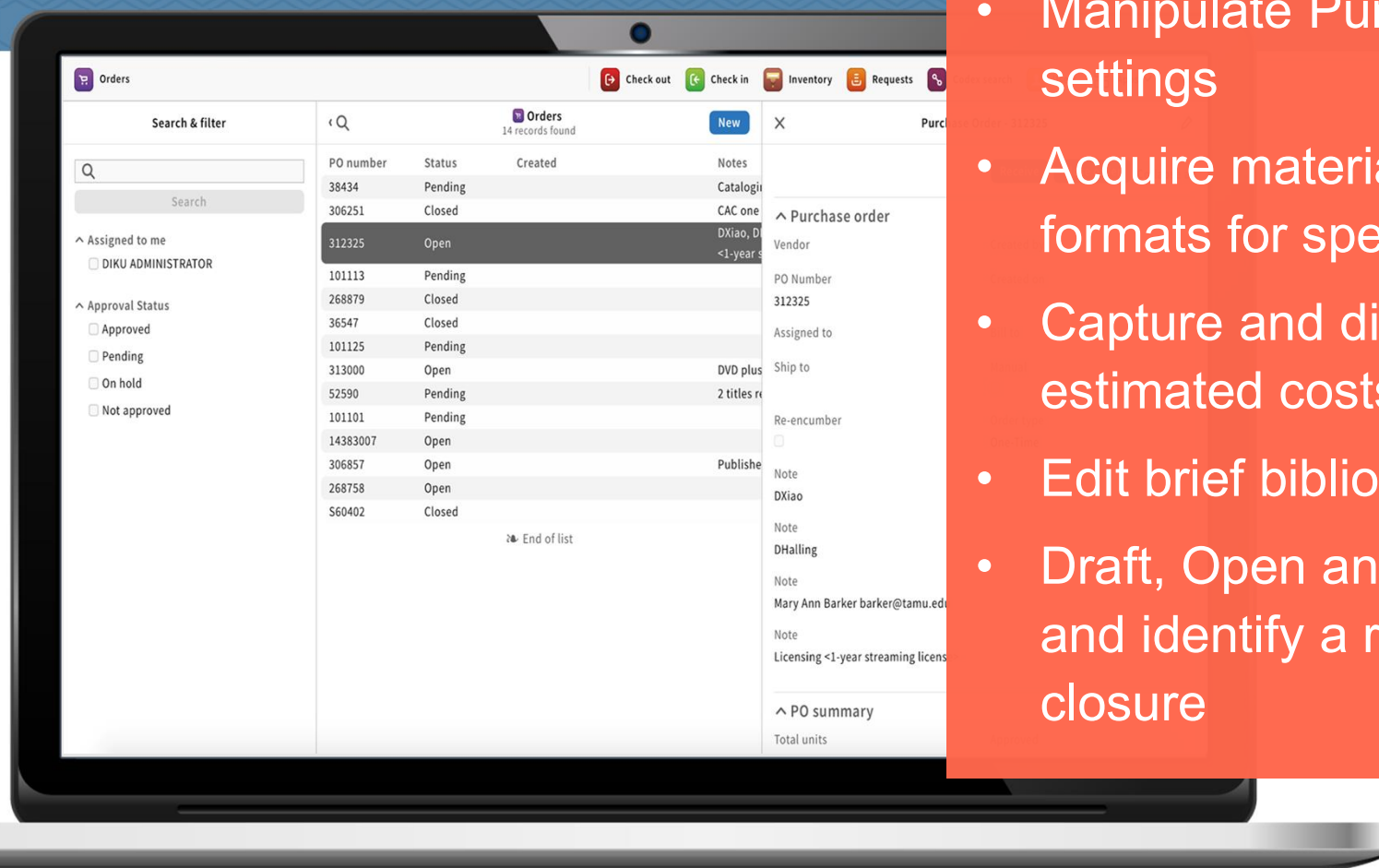
- Create, update and delete Vendors
- Search and filter by Vendor details
- Capture Contact information and contact people
- Add accounts, interfaces, and agreements
- Manage EDI Information

# Finances App



- Create Ledger, Fund, Budget and Fiscal Year
- Search and filter for Ledger, Fund, Budget and Fiscal Year
- Assign Funds to Ledgers and assign Budgets to Funds for a Fiscal Year

# Orders App

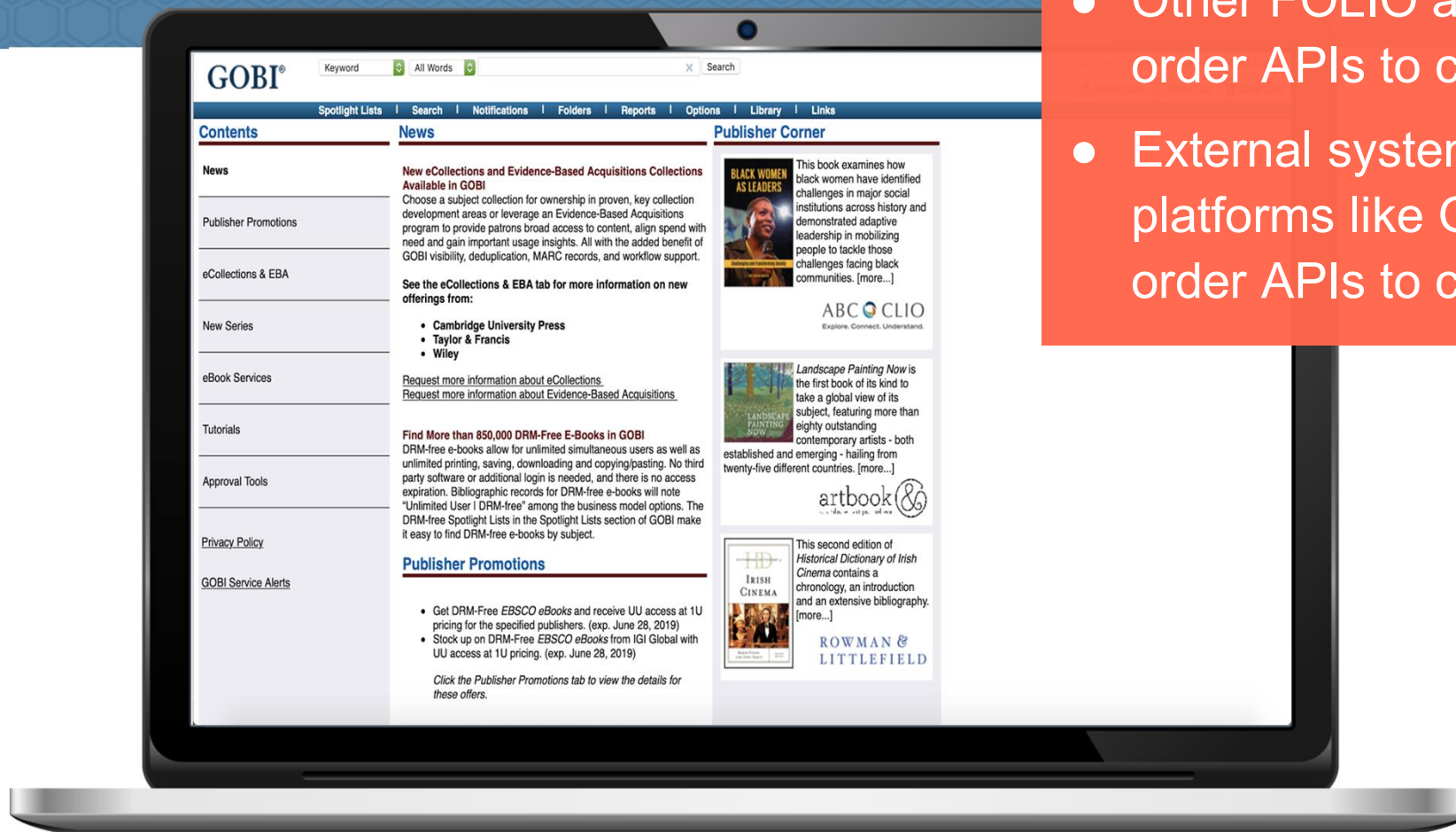


- Manipulate Purchase order settings
- Acquire materials of varying formats for specific locations
- Capture and distribute estimated costs
- Edit brief bibliographic details
- Draft, Open and Close orders and identify a reason for closure



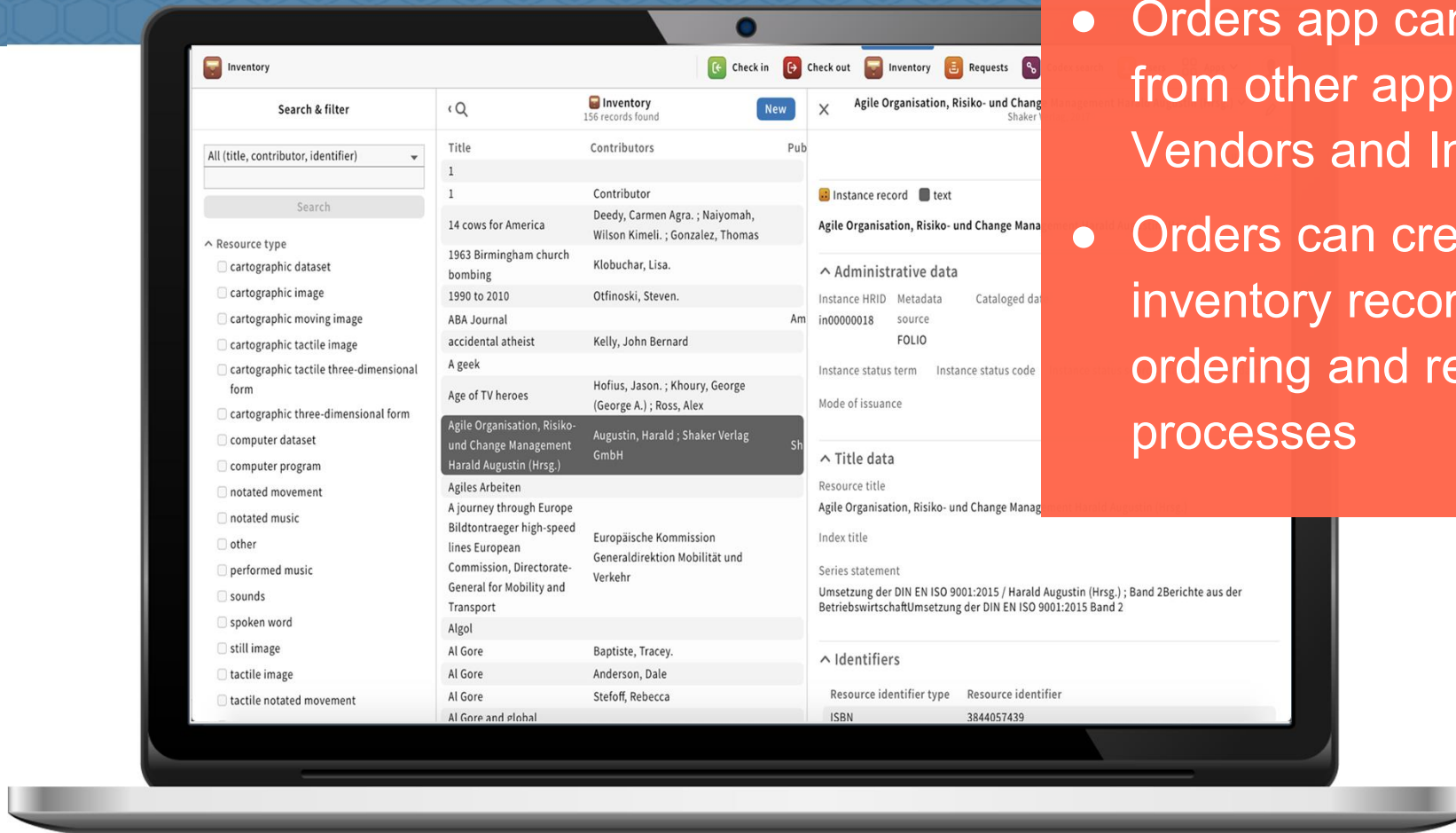
# Orders Integrations

- Other FOLIO apps can use order APIs to create Orders
- External systems (Eg. Vendor platforms like GOBI) can use order APIs to create orders



# Orders Interactions

- Orders app can pull information from other applications like Vendors and Inventory
- Orders can create and update inventory records during ordering and receiving processes





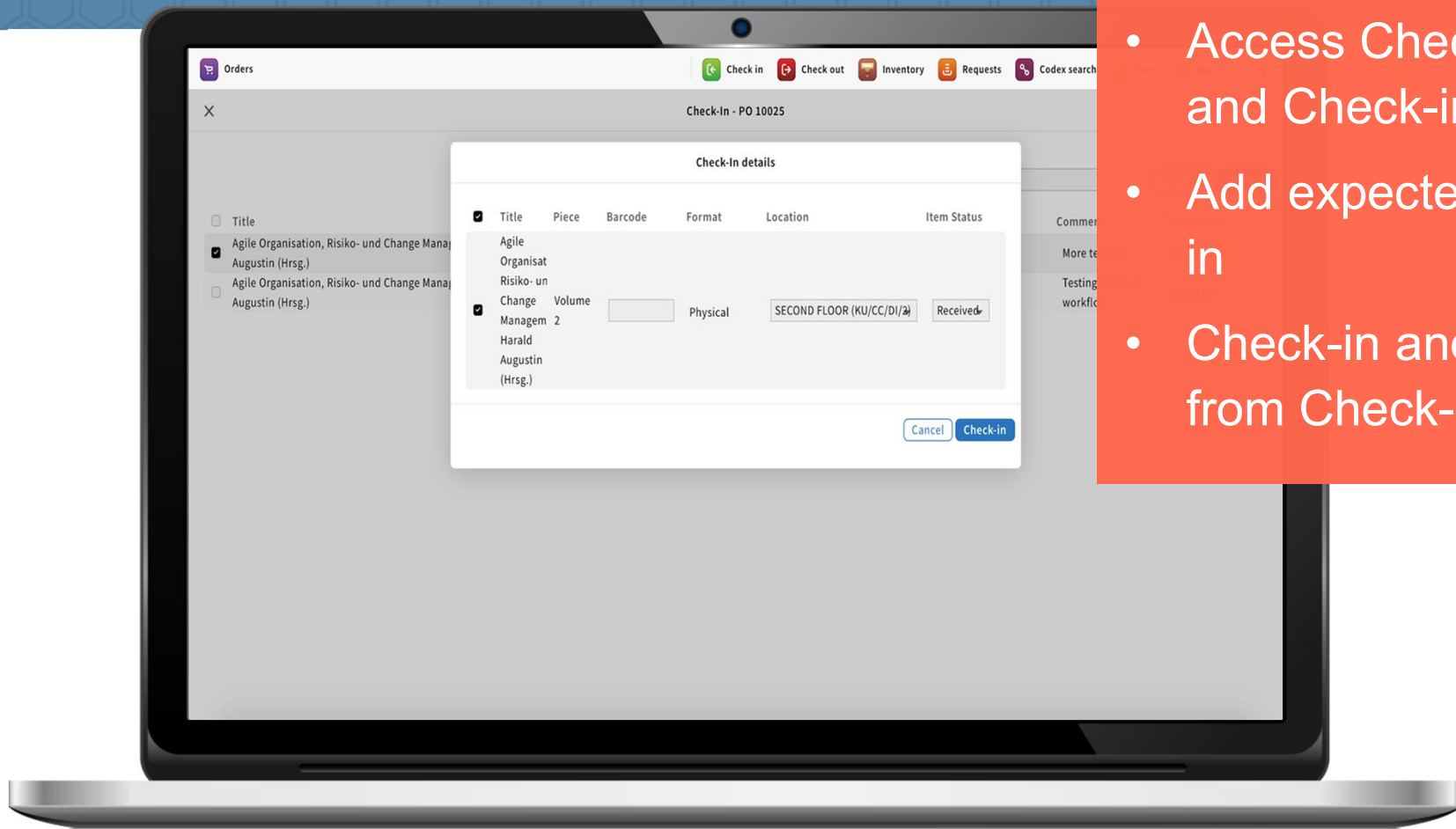
# Receiving

The screenshot shows the 'Receive - PO 10002' window in the Folio system. A modal titled 'POL 10002-1 - Title Harry Potter and the Chamber of Secrets' is open, displaying a table for receiving items. The table has columns for Barcode, Format, Location, and Item Status. There are 8 rows, each with a checkbox, a barcode input field, the format 'Physical Resource', the location 'Main Library (KU/CC/DI/M)', and the item status 'In process'. At the bottom of the modal are buttons for 'Cancel', 'Previous', and 'Next'.

	Barcode	Format	Location	Item Status
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process
<input type="checkbox"/>		Physical Resource	Main Library (KU/CC/DI/M)	In process

- Access receiving items area
- Receive multiple copies of multiple titles
- Update or add details to inventory records while receiving (Barcode, Item Status, Location)
- Access receiving history and unreceive items

# Check-in



- Access Check-in items area and Check-in History
- Add expected pieces to Check-in
- Check-in and remove pieces from Check-in



# DEMO



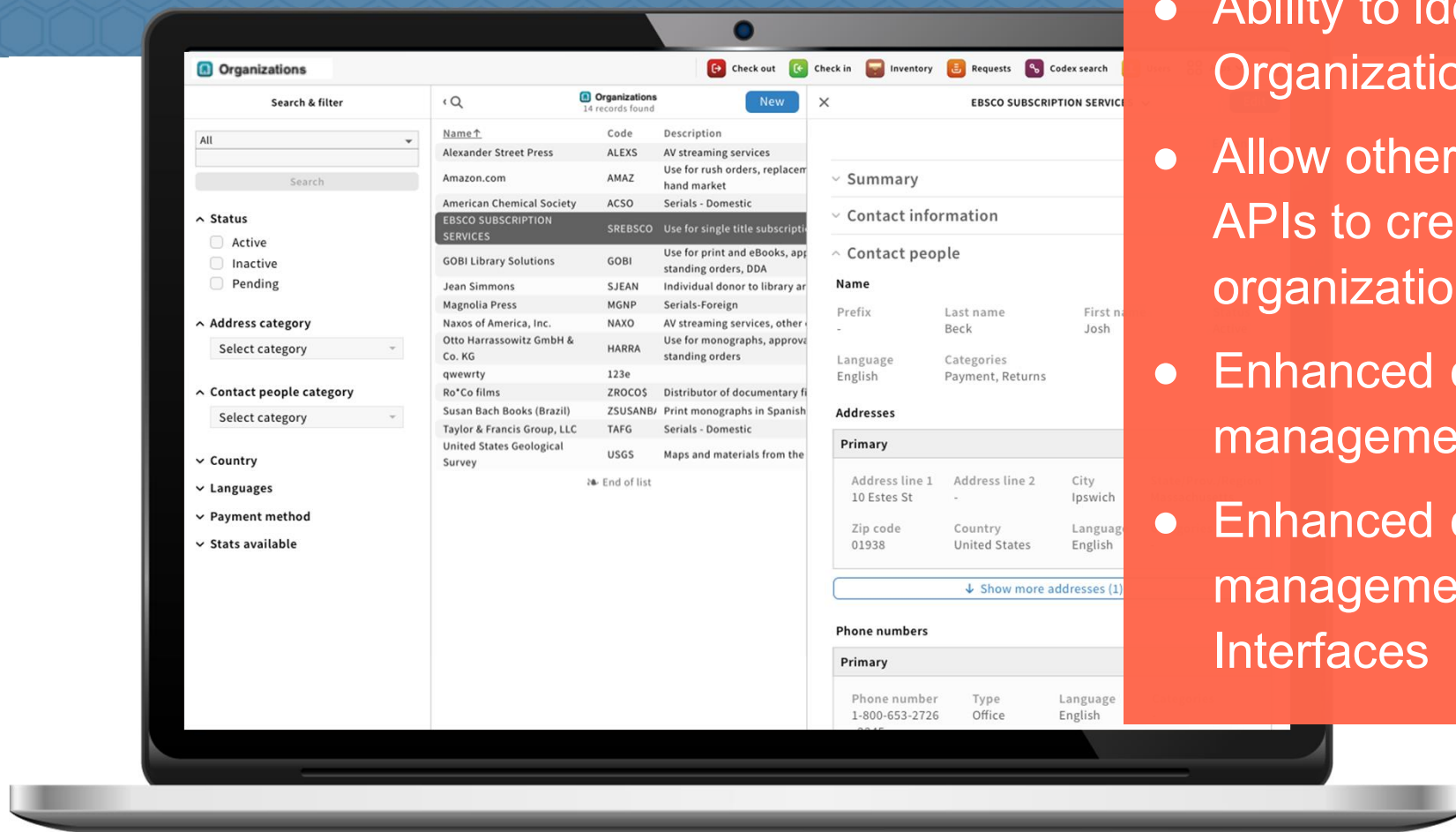
# FOLIO Acquisitions

Where are we going?

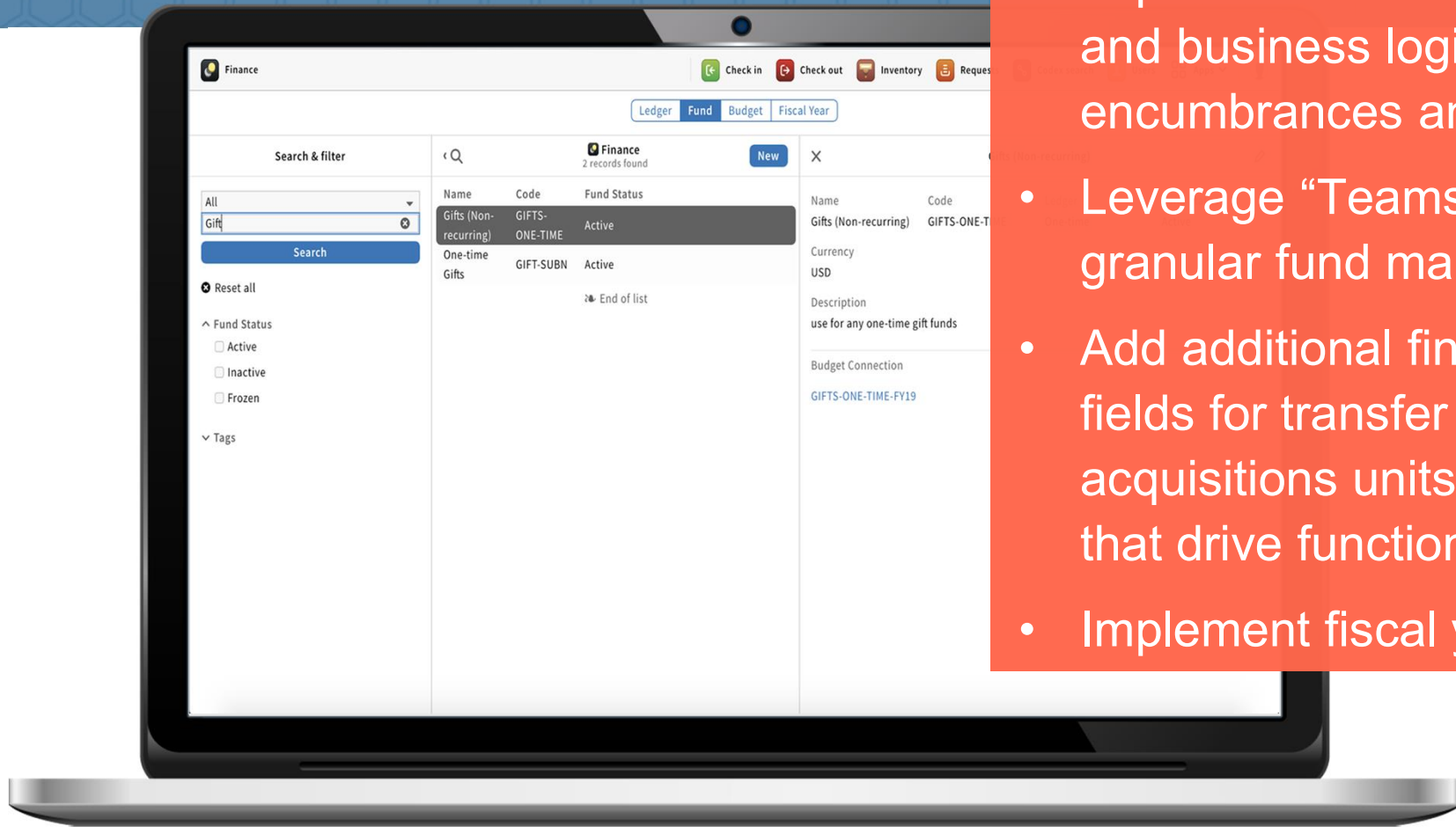
Q2 and beyond...

# Organizations – (Previously Vendors)

- Ability to identify an Organization as a vendor
- Allow other apps to use APIs to create organizations
- Enhanced creation and management of contacts
- Enhanced creation and management of Interfaces



# Finances

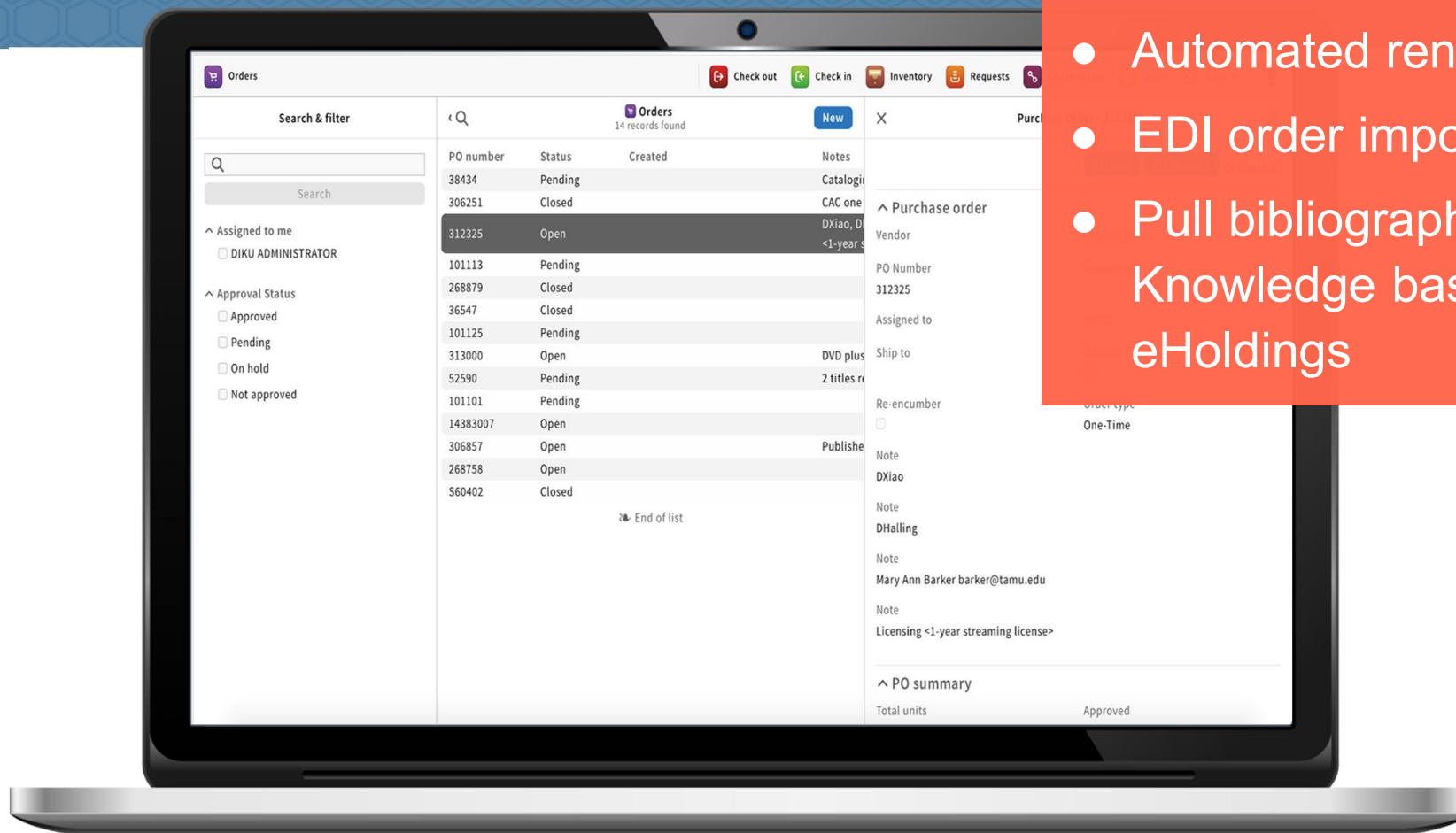


- Implement financial value system and business logic for encumbrances and expenditures
- Leverage “Teams” feature for more granular fund management
- Add additional financial record fields for transfer restrictions, acquisitions units and other fields that drive functionality
- Implement fiscal year rollover tools



# Orders

- Automated renewals
- EDI order import
- Pull bibliographic data from Knowledge base through eHoldings



# Receiving

Receiving & Checkin

Search & Filter

Q Title C

Reset all

Received Date Range

☐ Today

☒ Last 7 Days

☒ This Month

☒ Last 30 Days

☐ This Year

☐ All Time

Order Type

☐ One-Time

☒ Ongoing

Status

☐ Expected

☒ Received

Vendor

☐ Amazon

☒ EBSCO

☐ GOBI

Material Type

☐ eBook

☒ Journal

☐ Serial

Order Format

☐ Electronic

☒ Physical

☐ P/E Mix

☐ Other

Title	Caption	POLine	Location	Ordered	Received
Title C	Issue 5	12345-1	Location	00/00/0000	00/00/0000
Title C	Issue 4	22345-1	Location	00/00/0000	00/00/0000
Title C	Issue 3	22345-2	Location	00/00/0000	00/00/0000
Title C	Issue 2	22345-3	Location	00/00/0000	00/00/0000
Title C	Issue 1	52345-1	Location	00/00/0000	00/00/0000

Title C

Caption\*

Issue 1

Status\*

Received

Comments

This would be a

Supplement

Create Item

Item

Title

Title C

Product ID

9781634620123

Barcode

72527273070

Material Type Source

FOLIO

Description

Description

PO Line

PO Line ID

12345-1

Owner

Unit 1

Status

Closed

Created On

2017/12/18

Source

EDI

Selector

Acquisition Method

Approval Plan

Order Format\*

Physical

Receipt Date

00/00/0000

Donor

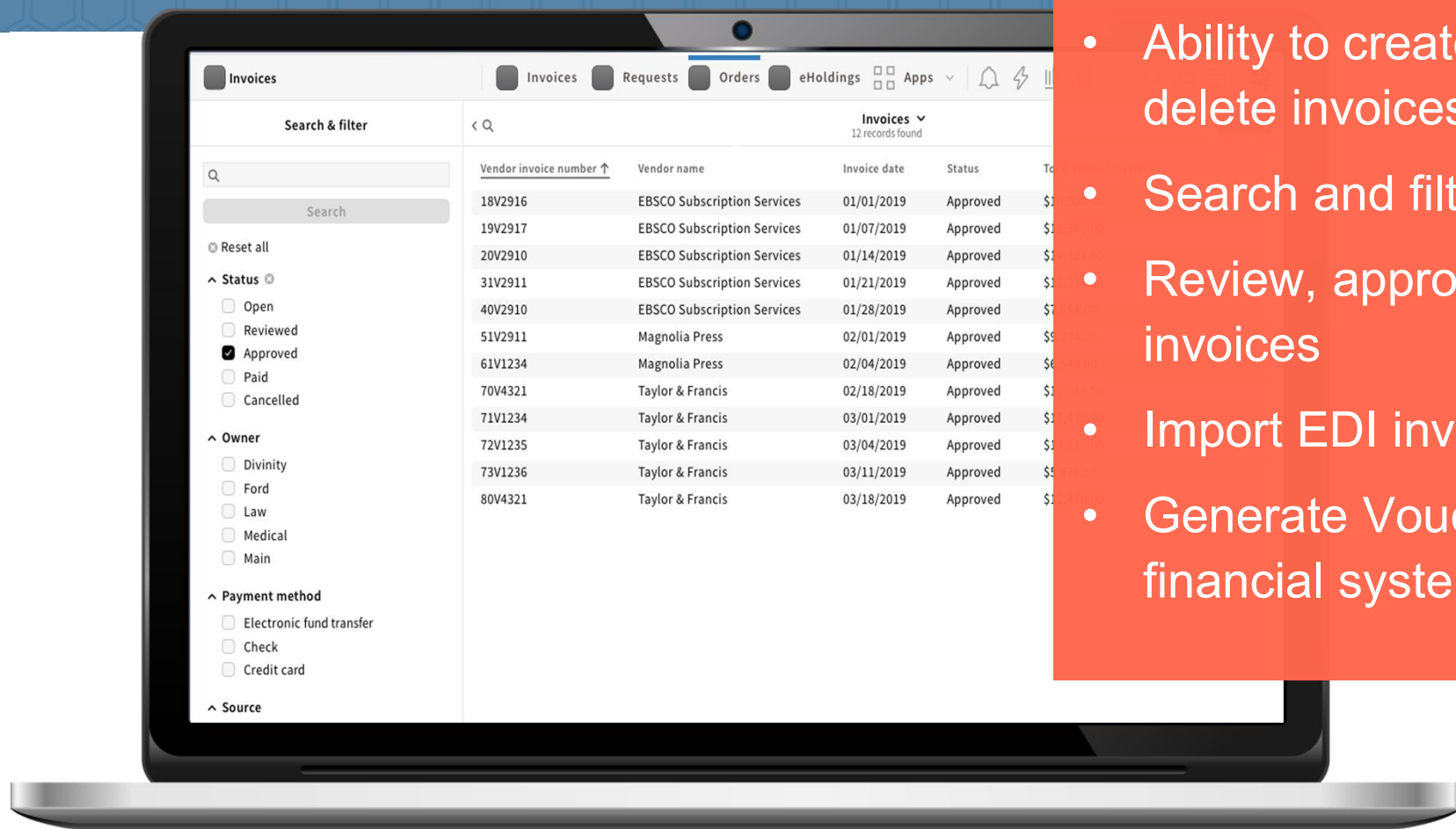
Jane Smith

Requester

Dr. Mustard

- Dedicated receiving user interface
- Including purchase order and invoice reference data
- Search and filter through all received items

# Invoices



- Ability to create, update and delete invoices
- Search and filter invoices
- Review, approve and pay invoices
- Import EDI invoices
- Generate Vouchers for export to financial system

# Key Takeaways

- **Now is a great time to get more involved in acquisitions discussions if you are interested in influencing Invoices, financial management and budgeting**
- **Now is the perfect time to be testing FOLIO acquisitions if you are interested in Organization management, Ordering or Receiving**
- **We REALLY want your feedback!**



Questions?