

## FOLIO Acquisitions

Where are we now and where are we going?

Dennis Bridges April 12, 2019



1 | www.folio.org

#### 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**



- 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

× Search & Filter	Q	ui-v	Vendors     + Net     vendors.resultCount	~	×
	<u>Name↑</u>	Code	Description		
Q	Alexander Street Press	ALEXS	AV streaming services	Acti	
~ Vendor Status	Amazon.com	AMAZ	Use for rush orders, replacement requests, and second hand market	Act	∧ Summary Name Code
Active	American Chemical Society	ACSO	Serials - Domestic	Act	Alexander Street Press ALEXS
<ul> <li>Pending</li> <li>Inactive</li> </ul>	EBSCO SUBSCRIPTION SERVICES	SREBSCO	Use for single title subscriptions.	Act	Description AV streaming services
La mactive	GOBI Library Solutions	GOBI	Use for print and eBooks, approval plans, firm orders, standing orders, DDA	Act	Vendor Names
	Jean Simmons	SJEAN	Individual donor to library archives	Act	
	Magnolia Press	MGNP	Serials-Foreign	Act	Name
	Naxos of America, Inc.	NAXO	AV streaming services, other onilne content	Act	Alexander Street
	Ro*Co films	ZROCO\$	Distributor of documentary films	Act	
	Susan Bach Books (Brazil)	ZSUSANBA	A! Print monographs in Spanish, books from Brazil	Act	<ul> <li>Contact Information</li> </ul>
	Taylor & Francis Group, LLC	TAFG	Serials - Domestic	Act	
	United States Geological Survey	USGS	Maps and materials from the USGS	Act	Address
					Address Alexandria VA USA 22314
					Phone Numbers
					Phone Number 1 800 889-5937
					Email Address
					Email customerservice@alexanderstreet.com - customer service email
					Url(s)
					[N]

- 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

			Check out 🕞 Inventory 👵 Reques
Search & filter	٢Q	Finance     Z records found     New	x
All Search	Name Code Gifts (Non- GIFTS- recurring) ONE-TIME One-time GIFT-SUBN Gifts	Fund Status Active Active № End of list	Name Code Gifts (Non-recurring) GIFTS-ONE-T Currency USD Description use for any one-time gift funds Budget Connection GIFTS-ONE-TIME-FY19

- 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

Orders				Check out	🕑 Check in	Inventory	E Requests	
Search & filter	٢Q		Orders 14 records found		New	х		P
Q	PO number	Status	Created		Notes			
Search	38434	Pending			Catalogi			
Search	306251	Closed			CAC one	∧ Purchas	e order	
∧ Assigned to me	312325	Open			DXiao, DI <1-year s	Vendor		
DIKU ADMINISTRATOR	101113	Pending				PO Number		
∧ Approval Status	268879	Closed				312325		
Approved	36547	Closed				Assigned to		
Pending	101125	Pending				Assigned to		
On hold	313000	Open			DVD plus	Ship to		
	52590	Pending			2 titles re			
Not approved	101101	Pending				Re-encumber		
	14383007	Open						
	306857	Open			Publishe	Note		
	268758	Open				DXiao		
	S60402	Closed				Note		
			🍋 End of list			DHalling		
						Note		
						Mary Ann Bark	ker barker@ta	nu
						Note		
						Licensing <1-y	ear streaming	lic
						∧ PO sumr	nary	
						Total units		
				_	_		_	-

- 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**

Contents	News	Publisher Corner
News Publisher Promotions	New eCollections and Evidence-Based Acquisition Available in GOBI Choose a subject collection for ownership in proven, k development areas or leverage an Evidence-Based Ac program to provide patrons broad access to content.	ey collections regulations line report with the second sec
eCollections & EBA	program Parking P	dded benefit of kflow support.
eBook Services	Wiley     Request more information about eCollections     Request more information about EVidence-Based Acq	Landscape Painting Now is the first book of its kind to take a global view of its
Tutorials	Find More than 850,000 DRM-Free E-Books in GOB DRM-free e-books allow for unlimited simultaneous us	subject, featuring more than established and emercing - haling from
Approval Tools	unlimited printing, saving, downloading and copying/pr party software or additional login is needed, and there expiration. Bibliographic records for DRM-free e-books "Unlimited User I DRM-free" among the business mod DRM-free Spotight Lists in the Spotight List section.	is no access swill note el options. The artbook
Privacy Policy	it easy to find DRM-free e-books by subject.	This second edition of Historical Dictionary of Irish
GOBI Service Alerts	<ul> <li>Get DRM-Free EBSCO eBooks and receive UL pricing for the specified publishers. (exp. June i Stock up on DRM-Free EBSCO eBooks from (UU UU access at 10 pricing. (exp. June 28, 2019)</li> </ul>	28, 2019) Ji Global with
	Click the Publisher Promotions tab to view the o these offers.	details for

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

foli

#### **Orders Interactions**

Search & filter	٢Q	So records found	Agile Organisation, Risiko- und Chang Shaker	ement Handid Augent
all (title, contributor, identifier) 👻	Title	Contributors F	ub	fro Ve
	1	Contributor	Instance record text	
Search	14 cows for America	Deedy, Carmen Agra. ; Naiyomah, Wilson Kimeli. ; Gonzalez, Thomas	Agile Organisation, Risiko- und Change Mana	• Or
Resource type Cartographic dataset	1963 Birmingham church bombing	Klobuchar, Lisa.	∧ Administrative data	
cartographic image	1990 to 2010	Otfinoski, Steven.	Instance HRID Metadata Cataloged dat	inv
cartographic moving image	ABA Journal		Am in00000018 source	
Cartographic tactile image	accidental atheist	Kelly, John Bernard	FOLIO	
cartographic tactile three-dimensional	A geek		Instance status term Instance status code	ord
form cartographic three-dimensional form	Age of TV heroes	Hofius, Jason. ; Khoury, George (George A.) ; Ross, Alex	Mode of issuance	
computer dataset     computer program	Agile Organisation, Risiko- und Change Management Harald Augustin (Hrsg.)	Augustin, Harald ; Shaker Verlag GmbH	sh ^ Title data	oro pro
notated movement	Agiles Arbeiten		Resource title	
notated music	A journey through Europe		Agile Organisation, Risiko- und Change Manag	
	Bildtontraeger high-speed	Europäische Kommission	Index title	
other	lines European	Generaldirektion Mobilität und		
performed music	Commission, Directorate- General for Mobility and	Verkehr	Series statement	(III ) D 100 '
sounds	Transport		Umsetzung der DIN EN ISO 9001:2015 / Harald Augusti BetriebswirtschaftUmsetzung der DIN EN ISO 9001:201	n (Hrsg.) ; Band 2Beric 5 Band 2
Spoken word	Algol			
🗌 still image	Al Gore	Baptiste, Tracey.	∧ Identifiers	
🗌 tactile image	Al Gore	Anderson, Dale	·· identifiers	
tactile notated movement	Al Gore	Stefoff, Rebecca	Resource identifier type Resource identifier	
	Al Gore and global		ISBN 3844057439	

- 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

Orders				Check out 💽 Check in	Inventory	y 🥫 Requests	<b>S</b> (
^			POL 10002-1 - Title Harry Pot		Secrets		
POLine	Title	Barcode	Format	Location		Item Status	1
10002-1	Harry Potter and the Chamb		Physical Resource	Main Library (KU/CC/	DI/M) 👻	In process 🕶	
			Physical Resource	Main Library (KU/CC/I	DI/M) 👻	In process 🕶	
			Physical Resource	Main Library (KU/CC/I	DI/M) 👻	In process 🕶	
			Physical Resource	Main Library (KU/CC/I	DI/M) 👻	In process 🕶	
			Physical Resource	Main Library (KU/CC/I	DI/M) 👻	In process 🕶	
			Physical Resource	Main Library (KU/CC/	DI/M) 👻	In process 🕶	
			Physical Resource	Main Library (KU/CC/	DI/M) 👻	In process 🕶	
			Physical Resource	Main Library (KU/CC/I	DI/M) 👻	In process 🕶	
		·	;		Cancel	Previous Next	ī

- 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

X		Check-In - PO 10025	
		Check-In details	
<ul> <li>Title</li> <li>Agile Organisation, Risiko- und Change Manaj Augustin (Hrsg.)</li> <li>Agile Organisation, Risiko- und Change Manaj Augustin (Hrsg.)</li> </ul>	Agile Organisat Risiko- un Change Volume –	arcode Format Location Item Status Comme More 1 Testin workf	er te te ding
	Managem 2 Harald Augustin (Hrsg.)	Physical SECOND FLOOR (KU/CC/DI/2) Received WOrk	•
		Cancel Check-in	

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

foli

Check-in and remove pieces
 from Check-in







## **FOLIO** Acquisitions

Where are we going?

Q2 and beyond...



12 | www.folio.org -

#### Organizations – (Previously Vendors)

Search & filter		Organizations 14 records found	New	×	EBSCO SUBSCRI	PTION SER
All	<u>Name↑</u>	Code	Description			
	Alexander Street Press	ALEXS	AV streaming services			
Search	Amazon.com	AMAZ	Use for rush orders, replacen hand market	<ul> <li>Summary</li> </ul>		
	American Chemical Society	ACSO	Serials - Domestic	<ul> <li>Contact info</li> </ul>		
∧ Status	EBSCO SUBSCRIPTION SERVICES	SREBSCO	Use for single title subscription			
Inactive	GOBI Library Solutions	GOBI	Use for print and eBooks, ap; standing orders, DDA	△ Contact peo	ple	
Pending	Jean Simmons	SJEAN	Individual donor to library ar	Name		
	Magnolia Press	MGNP	Serials-Foreign	Prefix	Last name	Firs
Address category     Select category	Naxos of America, Inc. Otto Harrassowitz GmbH &	NAXO	AV streaming services, other Use for monographs, approva	÷	Beck	Jos
	Co. KG gwewrty	123e	standing orders	Language	Categories	
<ul> <li>Contact people category</li> </ul>	Ro*Co films	ZROCOS	Distributor of documentary fi	English	Payment, Returns	
	Susan Bach Books (Brazil)		Print monographs in Spanish	Addresses		
Select category 👻	Taylor & Francis Group, LLC	TAFG	Serials - Domestic	Addresses		
∽ Country	United States Geological Survey	USGS	Maps and materials from the	Primary		
✓ Languages		🍋 End of list		Address line 1 10 Estes St	Address line 2	City Ipswi
✓ Payment method						
✓ Stats available				Zip code 01938	Country United States	Lang Engli:
					↓ Show more a	ddresses
				Phone numbers		
				Primary		
				Phone number 1-800-653-2726	×1	Langua English
				0.045		

- 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

	٢Q		C Finance 2 records found	×
•	Name	Code	Fund Status	Name Code
0	Gifts (Non- recurring)	GIFTS- ONE-TIME	Active	Gifts (Non-recurring) GIFTS-ONE
	One-time Gifts	GIFT-SUBN	Active	Currency USD
			🍽 End of list	Description
				use for any one-time gift funds
				Budget Connection
				GIFTS-ONE-TIME-FY19
		Gifts (Non-recurring)	Gifts (Non- GIFTS- recurring) ONE-TIME One-time CIET_SUBM	Name         Code         Fund Status           Gifts (Non-         GIFTS-           recurring)         ONE-TIME           One-time         GIFTS-UBN           Gifts         Active

- 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

Search & filter	(Q		Orders 14 records found	New	X Pu	• ED
Q Search Assigned to me DIKU ADMINISTRATOR Approval Status	PO number 38434 306251 312325 101113 268879 36547	Status Pending Closed Open Pending Closed Closed	Created	Notes Catalog CAC one DXiao, I <1-year	<ul> <li>Purchase order</li> <li>Vendor</li> <li>PO Number</li> <li>312325</li> </ul>	<ul> <li>ED</li> <li>Pul</li> <li>Kno</li> <li>eHo</li> </ul>
Approved Pending On hold Not approved	101125 313000 52590 101101 14383007	Pending Open Pending Pending Open		DVD plu 2 titles :	Assigned to s Ship to Re-encumber	eHc
	306857 268758 \$60402	Open Open Closed	₹& End of list	Publish	e DXiao Note DHalling Note Mary Ann Barker barker@tamu.e Note Licensing <1-year streaming lice	edu
					∧ PO summary Total units	Approved

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

folio\*

#### Receiving

Q. Title C  Search  Reset all  Received Date Range  Today  Cast 2 Days  This Month  Last 30 Days This Year All Time	Title C Issue 5 Title C Issue 5 Title C Issue 4 Title C Issue 3 Title C Issue 2 Title C Issue 1	POLine         Locati           12345-1         Locati           22345-1         Locati           22345-2         Locati           52345-1         Locati	on 00/00/0000 00/00/0 on 00/00/0000 00/00/0 on 00/00/0000 00/00/0	Issue 1           000         Status*           000         Received	Comments This would be a Supplement C Create Item C
<ul> <li>∧ Order Type</li> <li>○ One-Time</li> <li>⊘ Ongoing</li> <li>∧ Status</li> <li>Expected</li> <li>✓ Received</li> <li>∧ Vendor</li> </ul>				^ Item     Title     Title C     Product ID     9781634620123     Barcode     72527273070     Material Type Source     FOLIO     Description     Description	Item Status Available Accession Numt 18.999 Material Type C. Journal Electronic Book Jane Smith
<ul> <li>Amazon</li> <li>✓ EBSCO</li> <li>GOBI</li> <li>A Material Type</li> <li>eBook</li> <li>✓ Journal</li> <li>Serial</li> <li>Order Format</li> <li>Electronic</li> <li>✓ Physical</li> <li>P/E Mix</li> <li>Other</li> </ul>				<ul> <li>◇ PO Line</li> <li>PO Line ID</li> <li>12345-1</li> <li>Owner</li> <li>Unit 1</li> <li>Status</li> <li>Closed</li> <li>Created On</li> <li>2017/12/18</li> <li>Source</li> <li>EDI</li> <li>Selector</li> </ul>	Acquisition Met 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

foli

#### Invoices

Search & filter	< Q		Invoices ~ 12 records found		
Q	Vendor invoice number 个	Vendor name	Invoice date	Status	
Search	18V2916	EBSCO Subscription Services	01/01/2019	Approved	
	19V2917	EBSCO Subscription Services	01/07/2019	Approved	
Reset all	20V2910	EBSCO Subscription Services	01/14/2019	Approved	
∧ Status ©	31V2911	EBSCO Subscription Services	01/21/2019	Approved	
Open	40V2910	EBSCO Subscription Services	01/28/2019	Approved	
Reviewed	51V2911	Magnolia Press	02/01/2019	Approved	
Approved	61V1234	Magnolia Press	02/04/2019	Approved	
Paid     Cancelled	70V4321	Taylor & Francis	02/18/2019	Approved	
O cancelled	71V1234	Taylor & Francis	03/01/2019	Approved	
∧ Owner	72V1235	Taylor & Francis	03/04/2019	Approved	
Divinity	73V1236	Taylor & Francis	03/11/2019	Approved	
Ford	80V4321	Taylor & Francis	03/18/2019	Approved	
Medical					
Main					
<ul> <li>Payment method</li> </ul>					
Electronic fund transfer					
Check					
Credit card					
∧ Source					

- 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!









19 | www.folio.org