FOLIO Acquisitions
Where are we now and where are we going?

Dennis Bridges
April 12, 2019
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
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
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

- 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?