Acquisitions Interest Group Meeting Minutes

When: Thursday May 14th, 2015, 12:00pm PDT
Evergreen Conference 2015
Lunch Meeting
Where: Riverside Restaurant, Best Western Plus Hood River Inn

Attendance:
Christine Burns / BC Libraries Cooperative
Debbie Luchenbill / MOBIUS
Elaine Hardy / Georgia Public Library Service
Kathy Ellerton / University College of the North
Leslie St John / Georgia Public Library Service
Liam Whalen / BC Libraries Cooperative
Lindsay Stratton / Pioneer Library System
Lynn Floyd / Anderson County Library
Martha Crawwley / Cumberland Co. Public Library
Mary Llewellyn / Bibliomation
Millsa Macomber / Burlington Public Library
Mina Edmondson / York County Library System
Ruth Frasur / Hagerstown Jefferson Township Library
Tina Jordan / Georgia Public Library Service

Introductions
• most have at least one site using Acquisitions or are in the process of testing / implementing the Acquisitions module
Continued discussion from the Acquisitions session “Oh! The Places Acquisitions Can Go!”

Development / Wishlist (this is not the official list)
1. Ability to sort on a Purchase Order
2. Batch updater on a selection list
3. Incorrect status display for PO when multiple statuses exist
4. PO Interface should have additional Action menu at bottom or “navigate back to top” button – very tedious to have to scroll up and down
5. View/Place order should not open a new tab
6. Control for fiscal year – allow for multiple fiscal year
7. Rollover fund tags
8. Better way to name funds to tell them apart
9. Ability to credit and remove money from funds

Admin documentation
• There is a need for more Acquisitions administration documentation
  ◦ More info on how to setup the Acquisitions module

Acquisitions Training
• Some discussions regarding Acquisitions training strategies
• Sitka / MOBIUS using similar model 10-12 hours of training split into 5 sessions
• Administration
• Selection
• Ordering
• Receiving / Invoicing
• Follow-up
  • Everyone is in agreement that hands-on training / practice is required to understand the Acquisitions module / workflows

Current Projects
• Work is being done to simplify EDI Setup

How to Increase group Activity
1. Regular quarterly meetings
   • We will start with quarterly meetings via IRC
   • Next Meeting – Thursday August 13th 1:00pm EST / 10:00am PST
2. Increased communication via Evergreen channel
   • Posting “ah ha” moments to the General Listserv
   • Asking questions on the General Listserv
3. Reporting bugs on Launchpad

Action Items
1. Leslie / Elaine - will post the Development list from Acquisitions session “Oh! The Places Acquisitions Can Go!”
   • Once the list is posted we can start creating a list of requirements / specifications
2. Christine - Create Launchpad bug / wishlist reports
   • When receiving EDI Invoices - invoice details are "hidden" automatically – would like them to display automatically
   • Ability to remove old "Acquisitions queues" from the Inspect Queue interface
4. Christine – Add next AIG meeting to Evergreen Community Calendar