

## **Acquisitions Interest Group Meeting Minutes**

**When:** Thursday May 14<sup>th</sup>, 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 Crawlley / Cumberland Co. Public Library  
Mary Llewellyn / Bibliomation  
Millissa Macomber / Burlington Public Library  
Mina Edmondson / York County Library System  
Ruth Frasure / 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

Continue 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 13<sup>th</sup> 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
3. Christine – Update Acquisitions Interest Group wiki page - <http://wiki.evergreen-ils.org/doku.php?id=acq:interest-group>
4. Christine – Add next AIG meeting to Evergreen Community Calendar