

Evergreen -- Acquisitions Interest Group

June 12, 2019 @ 3:00pm Eastern

Join the meeting: Join Zoom Meeting https://zoom.us/j/709384902 One tap mobile +19294362866,,709384902# US (New York) +16699006833,,709384902# US (San Jose) Dial by your location +1 929 436 2866 US (New York) +1 669 900 6833 US (San Jose) Meeting ID: 709 384 902	<i>Organizers:</i> - Tiffany Little, PINES - Jennifer Pringle, BC Co-op
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Agenda

- I. 2019 Conference recap
 - [Using Evergreen to Create Purchase Requests](#) (Christina Thomas and Sylvia Orner)
 - [The EDI Message in the Acquisitions Module](#) (Tiffany Little)
 - [Future of Evergreen](#) brainstorming session recap
- II. Acq improvements in 3.2 and 3.3
 - 3.2 ([Release Notes](#))
 - ★ Invoice Closed Date and Closed By fields
 - ★ Auto-Cancel line items when all copies canceled
 - ★ Patron Acquisitions Requests rewritten in AngularJS
 - ★ [Angular Acq admin interfaces](#)
 - 3.3 ([Release Notes](#))
 - ★ MARC import/export interface (not directly related, but a step in our direction!)
- III. Upcoming Acq improvements in 3.4
 - [Sprint 0 of Angular Acq project](#) anticipated to be accepted in 3.4
- IV. Wiki updates

- New Acq namespace homepage:
<https://wiki.evergreen-ils.org/doku.php?id=acq:home>

V. **Next Feedback Fest:** July 29-Aug 2
Next Bug Squashing Week: Sept 9-13

V. Meeting Topic: Amazon ordering

How are you handling Amazon ordering in Acq?

- Mary: Manually creating purchase orders. Using federated search to find bibs.
- Jennifer: Same here. Using a combination of brief records on POs and using the View/Place order from the catalog. Recommend to librarians not to use federated search.
- Tiffany: We never see the vandelay page when we activate when items have 'link to catalog', Christine from the Co-cop said that this might be a permission issue
- Mary: Federated search cuts down on typing and entering manually. Most successful when searching local catalog.
- Jennifer: If federated search went away and we had a better interface via Z39.50. If use sources that need username/pw, no way to enter credentials. Wishlist: would be to have an option on Z39.50 to create a purchase order/create line item.
 - Jane: You can set a username/password for MARC federated search in Server Admin > Z39.50 Servers > click the source > Apply Credentials. May be able to set by org unit.
- Mary: Would like a permission set for that.
- Jane: We tried federated search for a while, but it was really annoying because of this bug: <https://bugs.launchpad.net/evergreen/+bug/1768846>
- Christine: Use Z39.50, you can search local catalog and sources. If you find a result in EG, you can click on Opac View and then do View/Place Order. If don't find native record, then you can import into the catalog and then do View/Place Order. So for libraries that don't care about on-order items, they don't do a purchase order; they just create an invoice and catalog as the items come in.
- Tiffany: Possible solution: download your order history via csv and finesse in MarcEdit to create (really) brief .mrc files. Send Elaine's template to Eg-Acq <--**ACTION ITEM**
 - Jennifer: Could use distribution formulas to assist with this. Even single branch libraries can use it as well!
- When adding brief records, note that may be affected by:
<https://bugs.launchpad.net/evergreen/+bug/1659709>
- Jennifer: Could MarcEdit have multiple templates? Like one for books where it puts in the 020 \$a and one for DVDS, etc.
- Nsahib: Do manual purchase orders in EG to encumber money, then order directly