

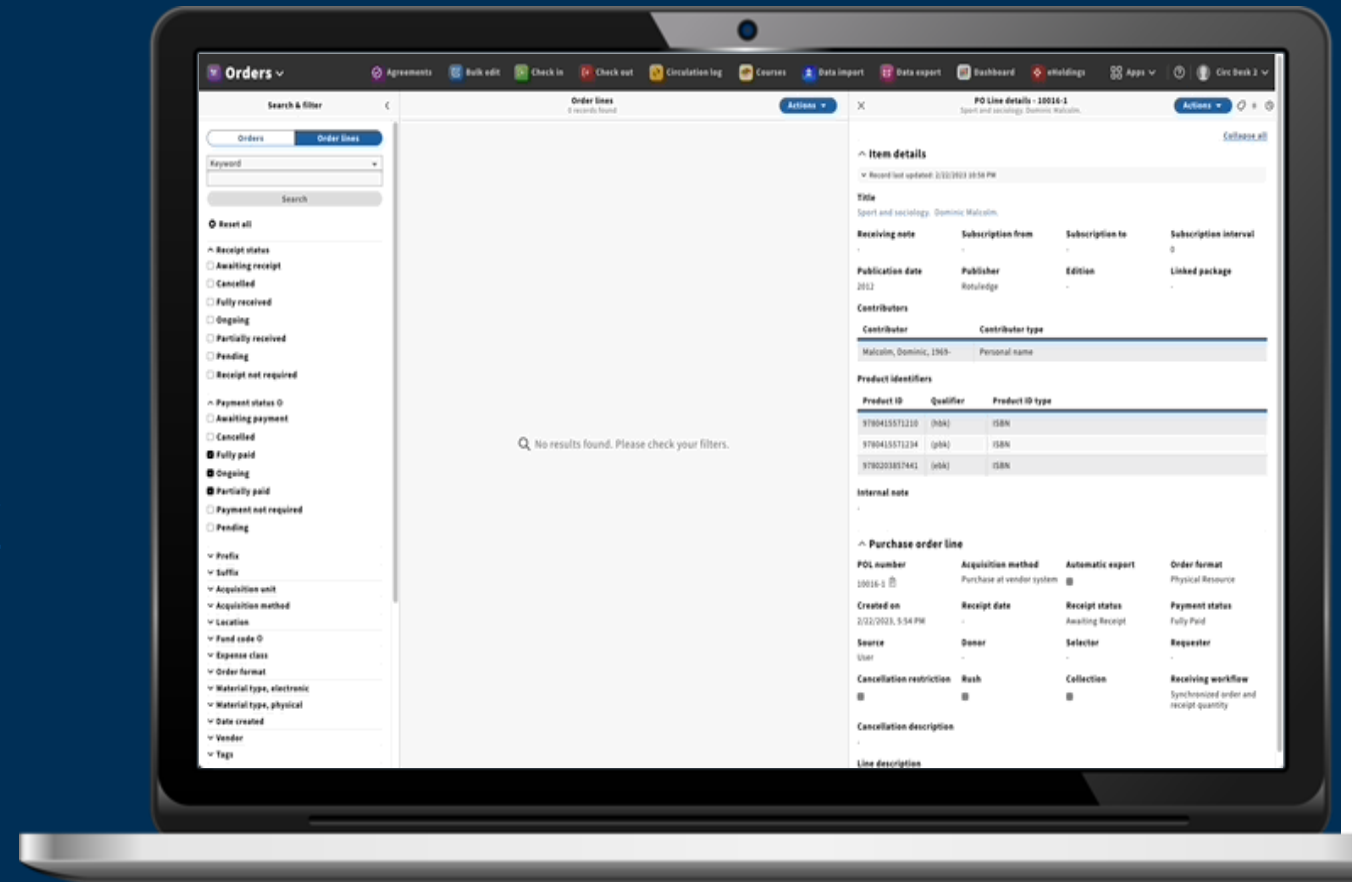
EBSCO

FOLIO Acquisitions Orchid Release Highlights

FOLIO PM
February 21, 2023

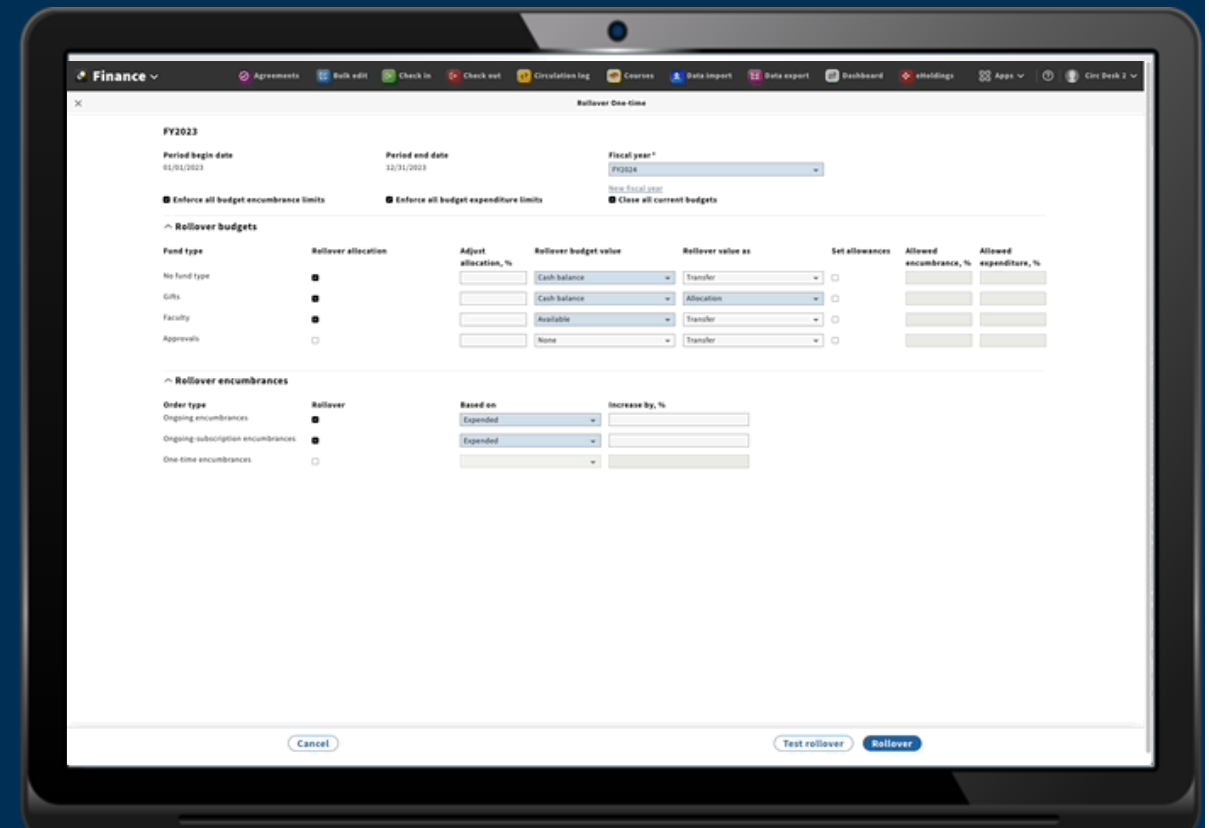
Allow user to edit the fund distribution(s) of an open order with related invoice(s)

- **What:** User is able to edit the fund distribution(s) of an order line with related paid invoice(s)
- **Positioning statement:** For acquisitions staff, edit fund distributions allows users to manage commitments for the coming year by unlocking the ability to move encumbrances to different funds
- **Feature(s):** <https://issues.folio.org/browse/UXPROD-3810>
- **Tied to a roadmap item:** Yes
- **Note:** Previously it was not possible to edit Fund distribution while invoice was paid in current Fiscal year.



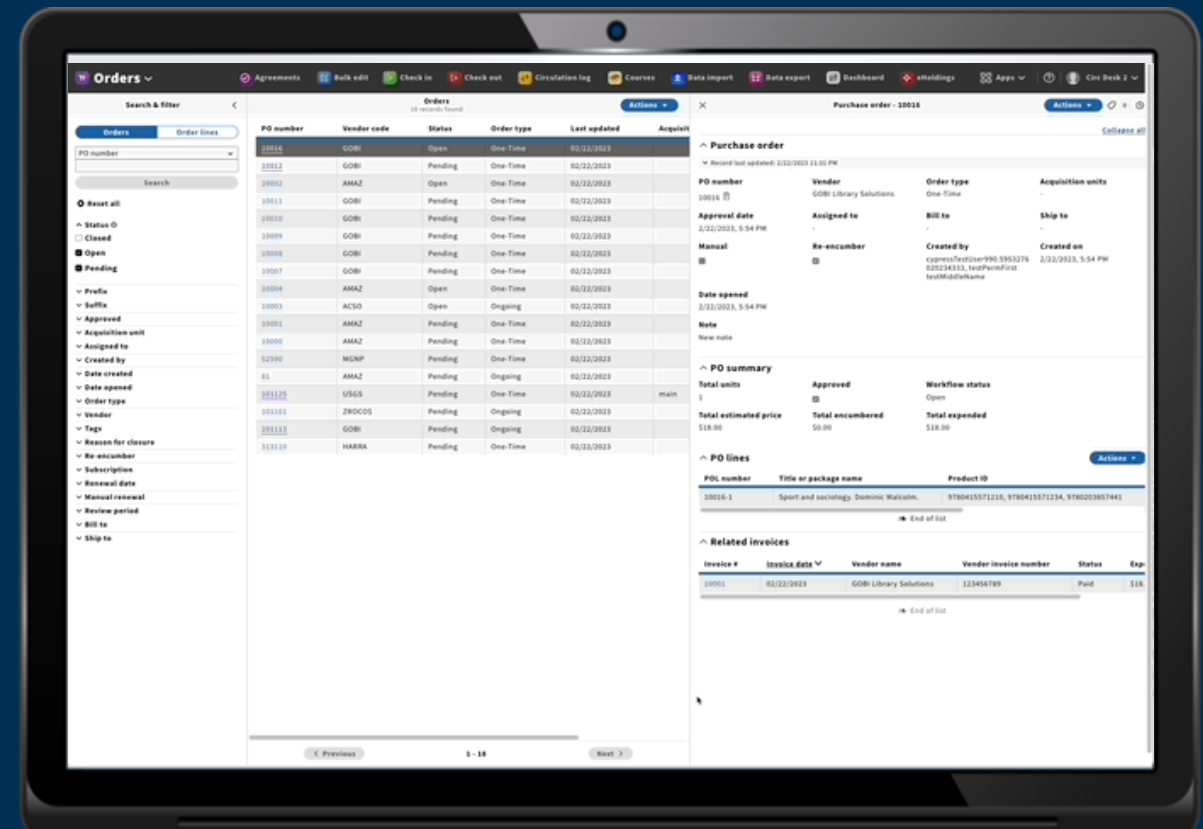
Allow user to rollover the “cash balance” of budgets

- **What:** Allow user to rollover the remaining “cash balance” of budgets as a transfer or allocation
- **Positioning statement :** acquisitions administrator rollover cash balance prevents encumbered values being counted twice during rollover by allowing user to rollover value that is not spent or only committed.
- **Feature(s):** <https://issues.folio.org/browse/UXPROD-3964>
- **Tied to a roadmap item:** Yes
- **Note:** Encumbered value is already removed from available amount so library is leaving commitments in past year.



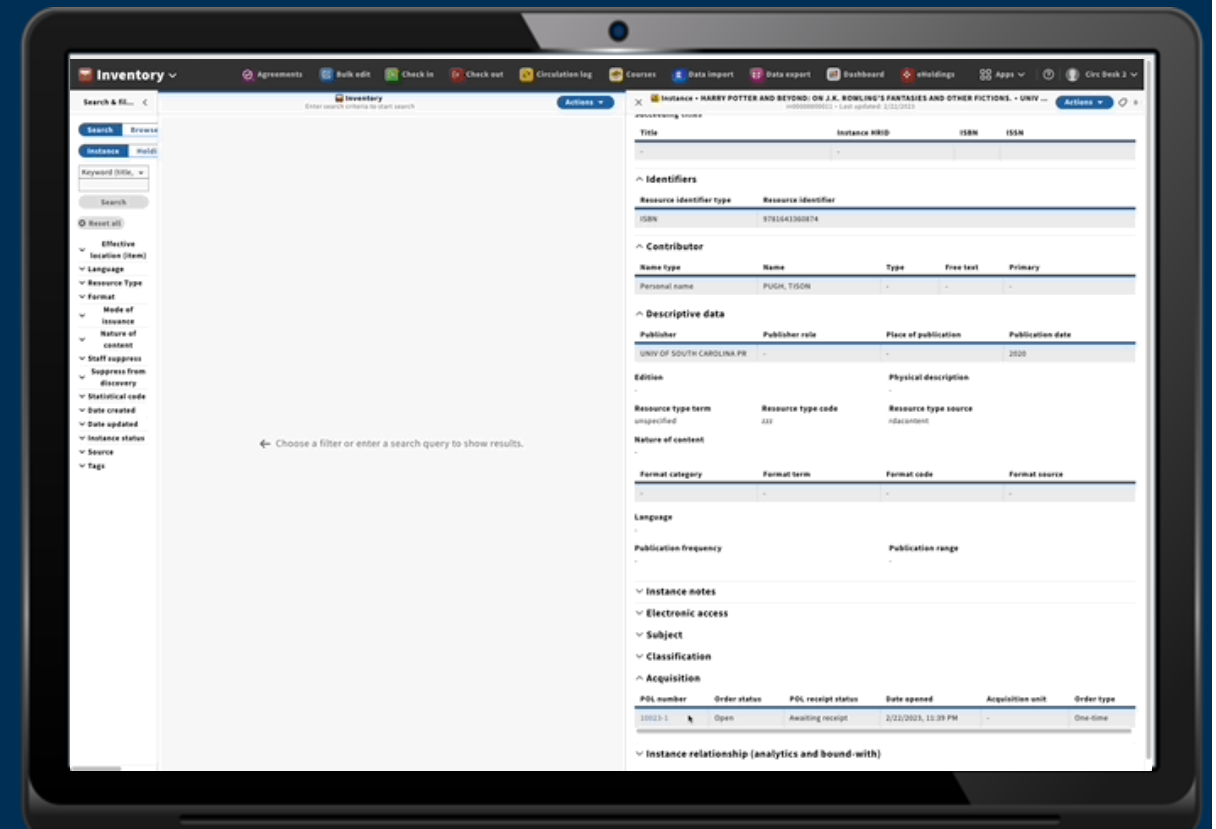
Display the history of edits for the order and order line

- **What:** Allow user to access a log of all edits made to an order or order line.
- **Positioning statement :** For hosting providers and acquisitions staff visible order history improves the ability to troubleshoot order issues. Satisfy auditors. AND gather the information needed to more effectively manage acquisitions
- **Feature(s):** <https://issues.folio.org/browse/UXPROD-3215>
- **Tied to a roadmap item:** Yes
- **Note:**



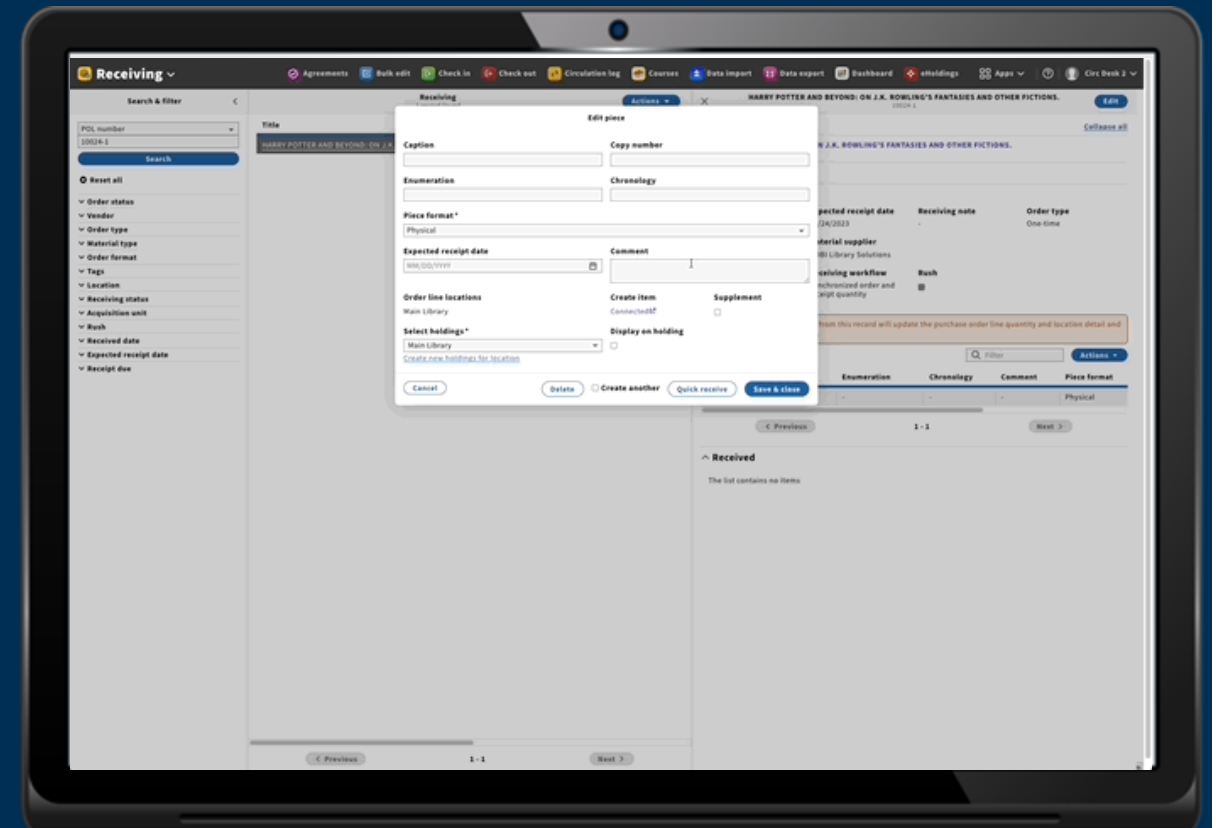
Set default of “Find or Create” holdings for orders created via API

- **What:** Use find or create new holdings logic by default for orders created via edge-orders
- **Positioning statement :** For ordering staff having default Find or create logic prevents the constant duplication of Holdings records for orders created via edge-orders (GOBI).
- **Feature(s):** <https://issues.folio.org/browse/UXPROD-3878>
- **Tied to a roadmap item:** Yes
- **Note:** For the last 3 releases GOBI was always creating a new holding. Now it will only create new if there isn't one already for that location



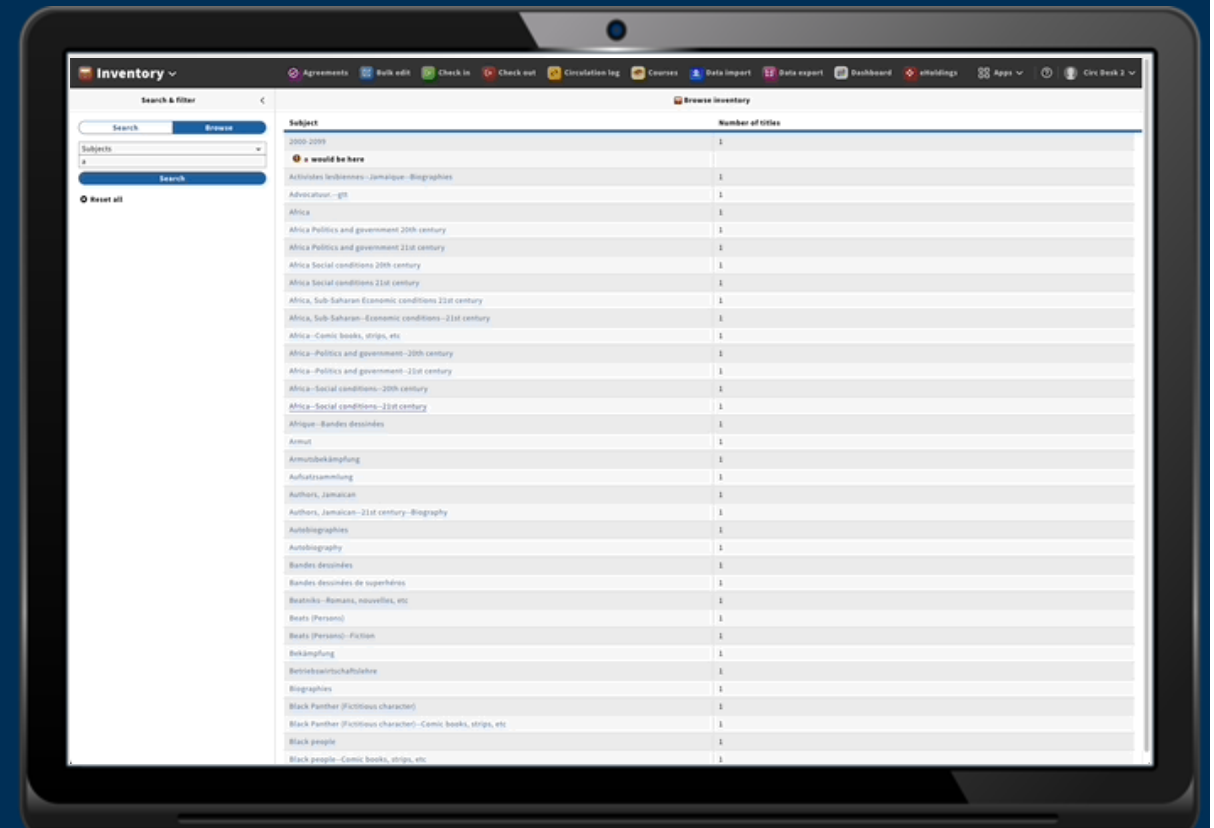
Implement data consistency Piece->Item

- **What:** Ensuring that when a piece is connected to an item and piece details like copy number are updated the related item is updated as well
- **Positioning statement :** For receiving librarians having data consistency automated will save time and maintain consistency between data in receiving and inventory applications
- **Feature(s):** <https://issues.folio.org/browse/UXPROD-3342>
- **Tied to a roadmap item:** Yes
- **Note:** Managing this in the other direct Item->piece was split. This functionality leverages the event driven architecture.



Inventory browse UX refactor

- **What:** Improve user experience and refactor code to improve the performance and functionality of Call number browse
- **Positioning statement :** For cataloging staff browse UX enhancements will Improve the user experience of inventory browse
- **Feature(s):** <https://issues.folio.org/browse/UXPROD-3762>
- **Tied to a roadmap item:** No
- **Note:** Picked up work to help manage gaps in UI development backlog



Questions