FOLIO Acquisitions: Tips & Tricks for Maximizing Workflows Customization in FOLIO Acquisitions

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Agenda



Fund groups



Expense classes



Custom fields in Purchase Orders and Purchase Order Lines

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Fund Groups

- Created in Finance app, Group tab
- Collection of one or more funds grouped together
- Categorizes funds regardless
 of ledger
- Enables the total amount available or allocated across multiple funds to be summarized

)	×				History		
r	^ Group inform	ation					
1	✓ Record last updated:	5/7/2025 1:17 AM					
	Name		Code			Fiscal year	
	History		HIST			FY2025	
	Acquisition units		Desci	ription			
	-			ry is an umbrella term t ormation about these e		events as well as the memo	ory, discovery, co
	^ Financial sum	mary					
	Funding information					Financial activity & ov	erages
	Description	Amou	nt	_		Description	Amount
	Initial allocation	\$200.0	0			Encumbered	\$2.00
	Increase in allocatio	n \$0.00				Awaiting payment	\$0.00
	Decrease in allocation	on \$0.00				Expended	\$1.00
	Total allocated	\$200.0	00			Credited	\$0.00
	Net transfers	\$0.00				Unavailable	\$3.00
	Total funding	\$200.0	00				
						Over encumbrance	\$0.00
						Over expended	\$0.00
	Cash balance: \$199.00					Available balance: \$197.00	
	^ Fund						
	Name A	Code	Allocated	Unavailable	Available		
	African History	AFRICAHIST	\$100.00	\$1.00	\$99.00	8	
	Asian History	ASIAHIST	\$100.00	\$2.00	\$98.00	8	



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Fund Group Ideas

Fund source (state v. endowment)



Order type (firm, ongoing, standing order)



Subject/College/Collection Area



Material type (book, journal, database, streaming media)

Expense Classes

^ Budget information

Name	Status*
AFRICAHIST-FY2025	Active
Allowable expenditure	Allowat

100

100

^	Expense of	classes
	Add expense	class

- Configured in Settings>Finance>Expense Classes
- Track spending by defined categories within a fund
- Enables tracking and reporting by the classes defined
- In order & invoice creation, both the fund and the expense class can be selected
- Added at the budget level in a fund



Expense Class Ideas



Requestor (collection development, subject librarian, faculty)



Order type (firm, ongoing, standing order)



Subject/College/Collection Area



Material type (book, journal, database, streaming media)

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Custom Fields

- Track additional information in the Purchase Order and Purchase Order Line
- Available as search and filter options in the Orders app

	Custom fields		Custom fields
Accordion title Custom fields		Accordion title Custom fields	
^ Perpetual · Mult	i-select	^ Date Requested	. Date nicker
Field label	Required		-
Perpetual	No	Field label	Required
Label		Date Requested	No
Non-Perpetual		∧ Access Note · Tex	t area
Perpetual		Field label	Required
		Access Note	No
\wedge Order Note \cdot Tex	t area		
Field label	Required		
Order Note	No		



Custom Field Options

<u>Checkbox</u>		
Date picker		
Multi-select	t	
Radio butto	n set	
Single seled	:t	
Text area		
Text field		

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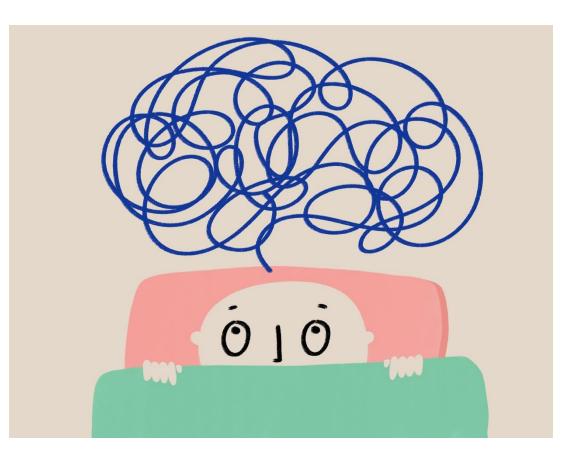
Searching & Filtering

- Purchase Orders
 - Custom fields (including text fields)
- Purchase Order Lines
 - Custom fields (including text fields)
 - Expense classes

•Export results in .csv

Considerations

- What do you want to track?
- Is there order data you tracked in Alma that you want to replicate in FOLIO?
- Expense classes cannot be deleted if assigned to a budget.





Questions/Ideas?