FOLIO Acquisitions: Tips & Tricks for Maximizing Workflows

Customization in FOLIO Acquisitions

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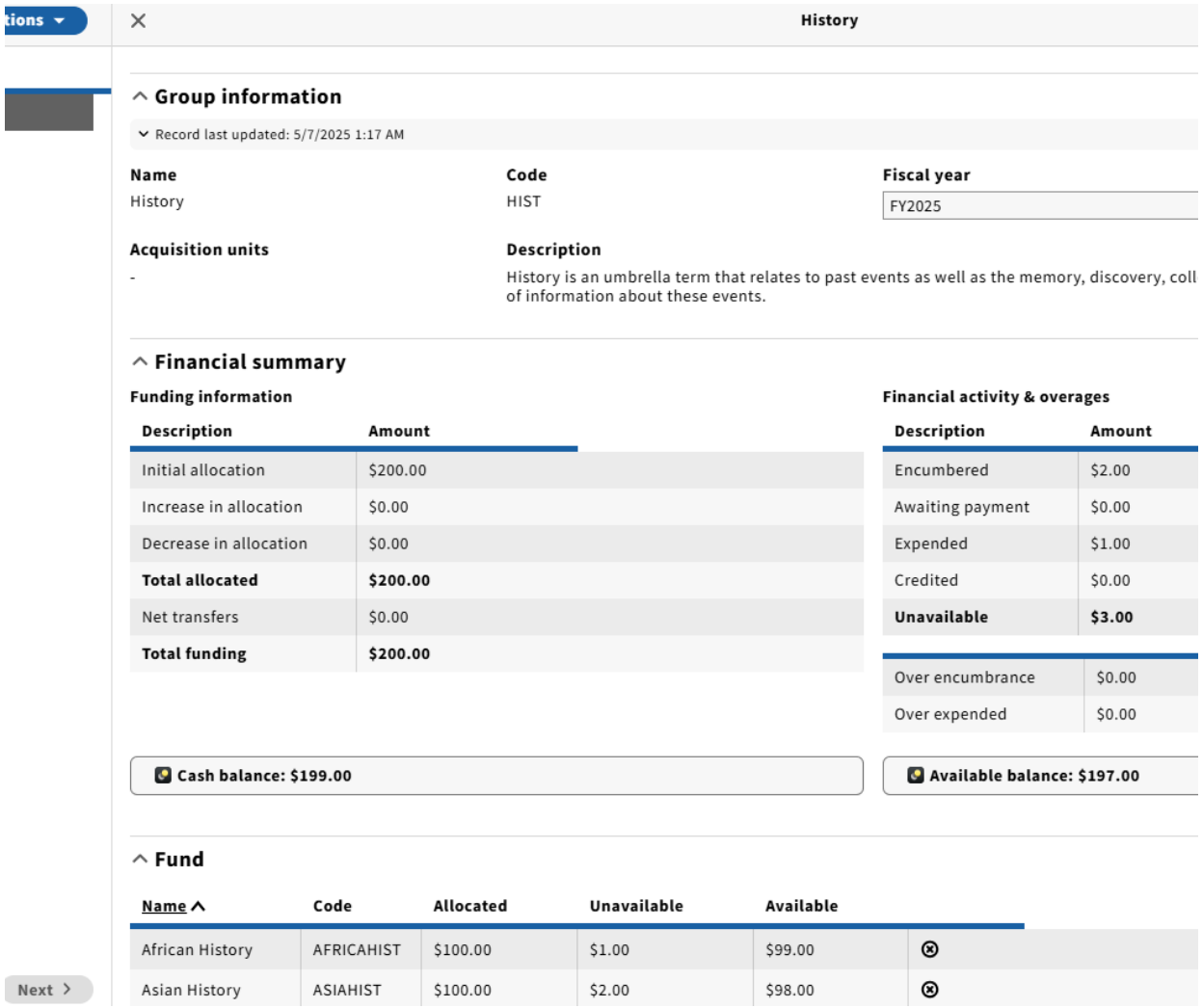
Agenda

- Fund groups
- Expense classes
- Custom fields in Purchase Orders and Purchase Order Lines

Fund Groups

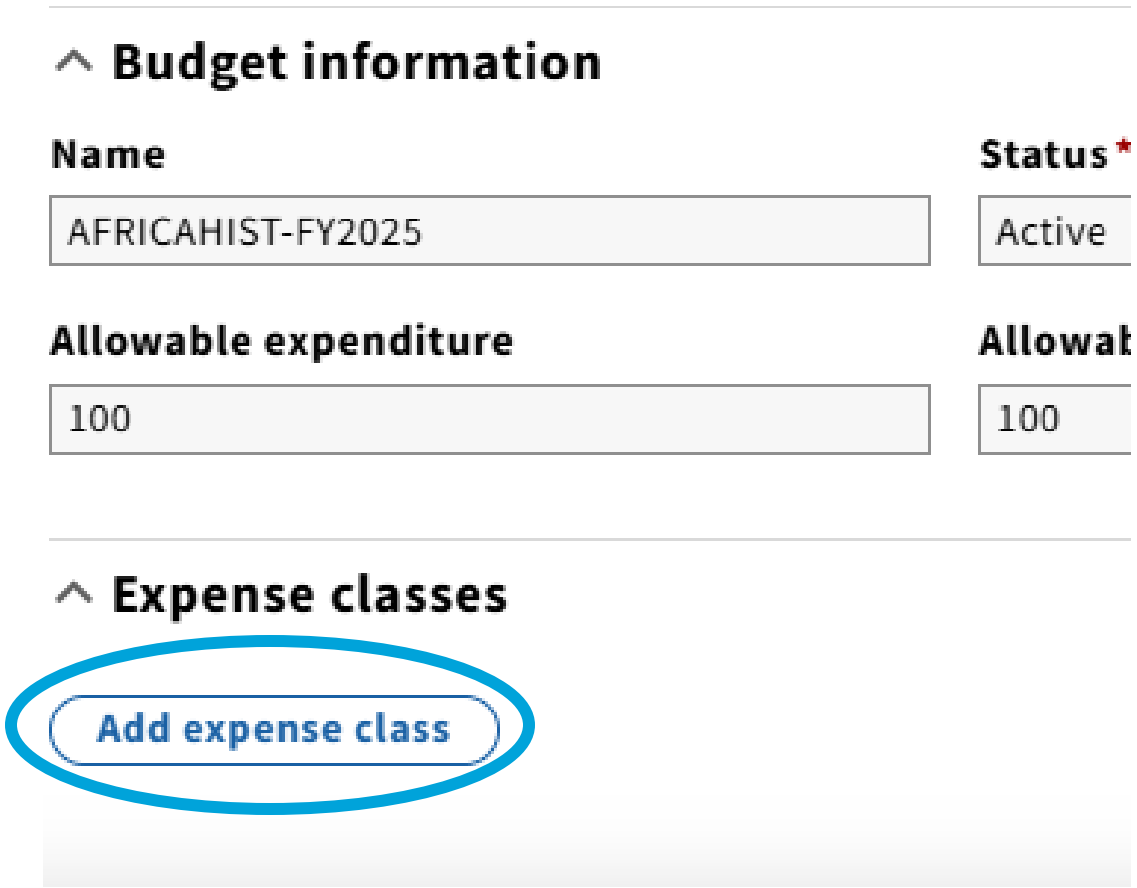
- Created in Finance app, Group tab
- Collection of one or more funds grouped together
- Categorizes funds regardless of ledger
- Enables the total amount available or allocated across multiple funds to be summarized



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



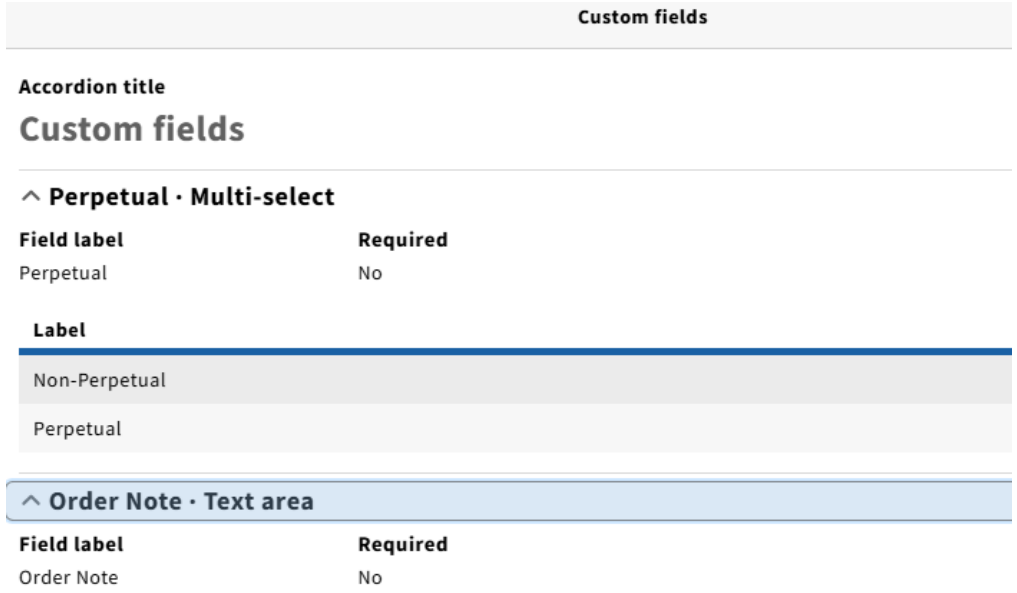
- Configured in Settings>Finance>Expense Classes
- Track spending by defined categories within a fund
- Enables tracking and reporting by the classes defined
- In order & invoice creation, both the fund and the expense class can be selected
- Added at the budget level in a fund

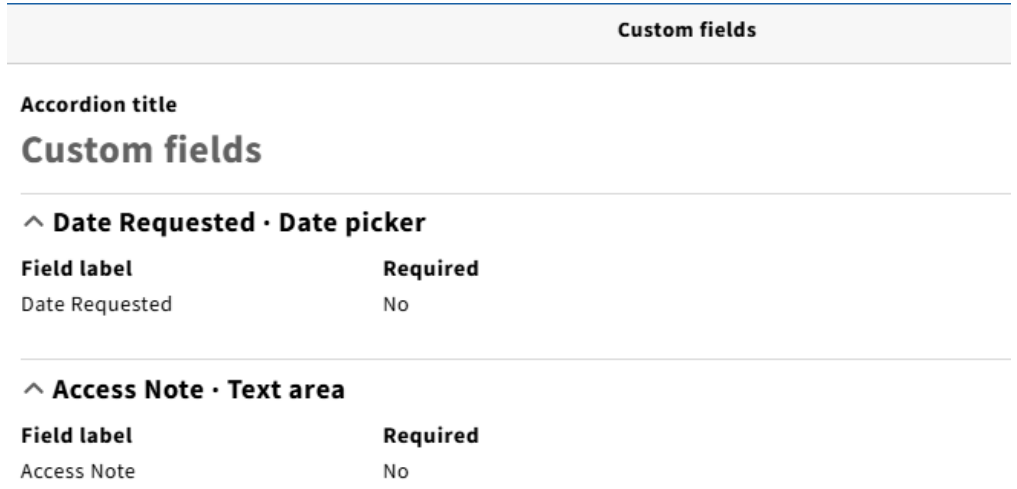
Expense Class Ideas

- Requestor (collection development, subject librarian, faculty)
- Order type (firm, ongoing, standing order)
- Subject/College/Collection Area
- Material type (book, journal, database, streaming media)

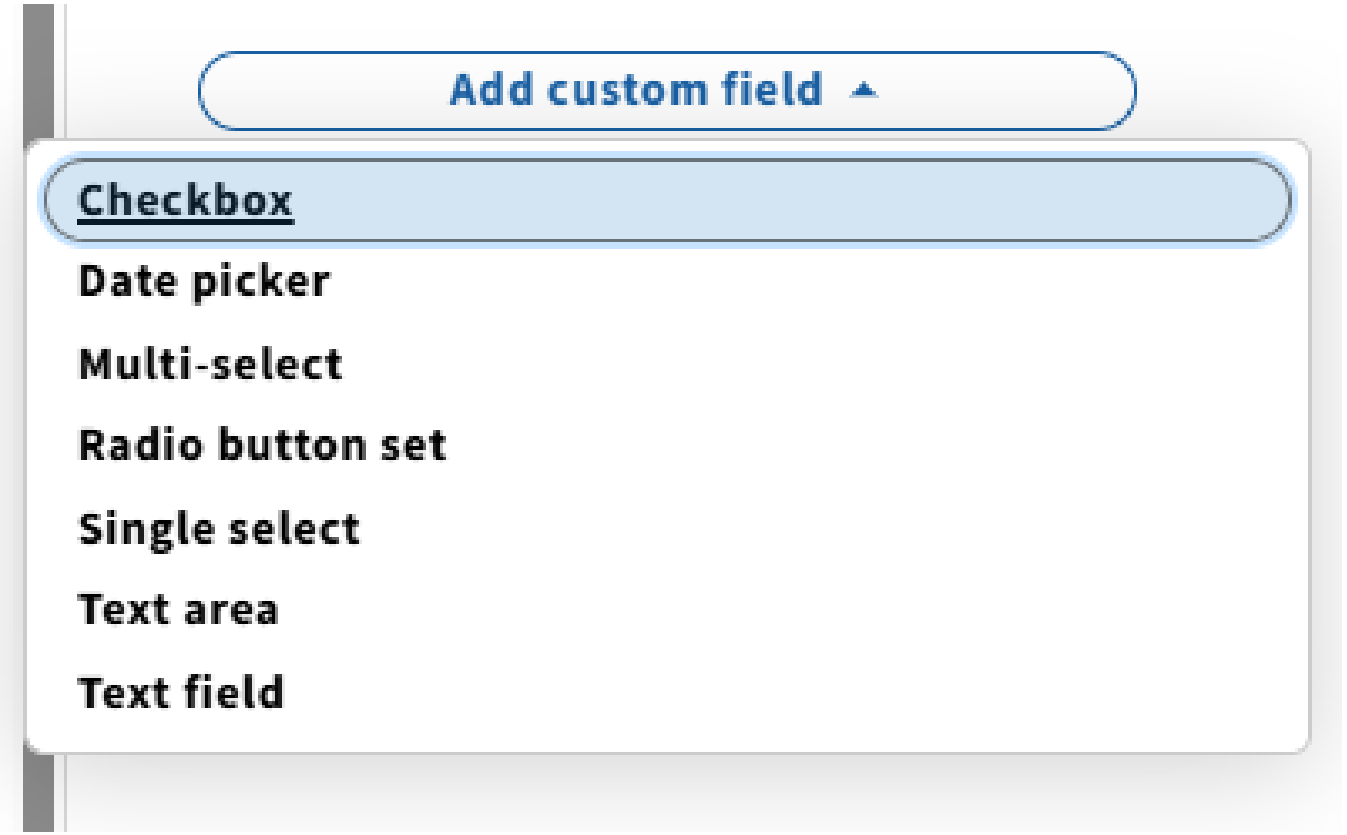
Custom Fields

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





Custom Field Options



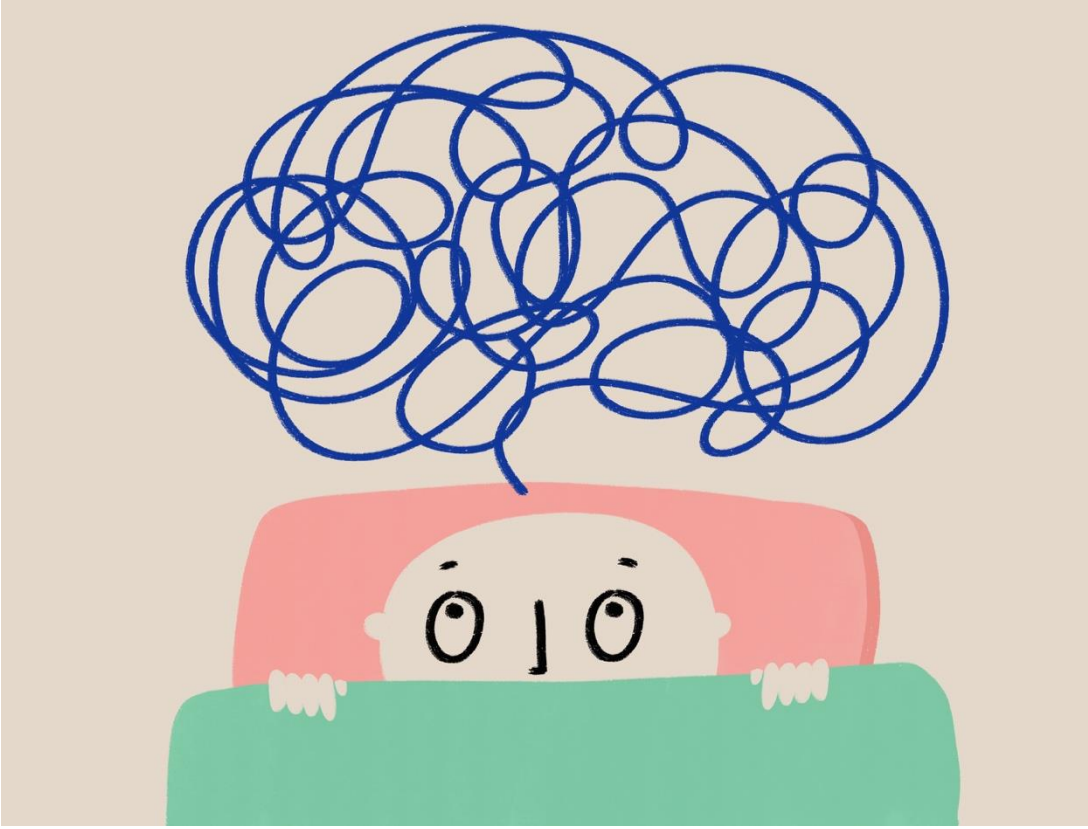
Searching & Filtering

- 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?