

**Schedule for epixtech's Acquisitions Visit at WSU**  
**Location: SEL 7<sup>th</sup> Floor, Conference Area, Acquisitions Area**  
**3/1/02**

1. Introductions, Overview of morning's activities, 9:00-9:30 goals, etc.  
(All)

Discussed here: Hoped-for results of meeting, expert advice regarding workarounds or remedies that might be possible for some of our problems, immediate or short-term enhancements possible, changes in the way epixtech tests and develops acq functions.

**ADJOURN TO WORKSTATIONS IN ACQ AREA:**

2. Security issues, old NOTIS structure, and acq data available for collection development librarians (Rosa, Cindy K., Adriene) 9:30-10:00 a.m.

3. Acquisitions Workflow Overview, and Specific Acq Problems, Needs, etc. 10:00-10:30 a.m.  
(Acq staff members take over meeting)

Demo'ed and discussed here: Font difficulty, PO linking problems, PO searching enhancement, approval "enhancement" and how this affected our work in the past, Budget transactions notes not showing in client, Standing order encumbrances, Not able to set to zero, Bib transferring problems.

**BREAK** 10:30-10:40 a.m.

4. More Specific Acq Problems, Needs, etc. 10:40-11:15 a.m.  
(Acq staff members still handling this part of meeting)

Vendor file problems, Claims letters, PO printing Discussion, Standing order renewals problem, Budget allocation changes - addition and subtracting must be done manually!, Canned reports needed beyond the ones in acq man module.

5. Cataloging's Acq-related Needs 11:15-11:30 a.m.  
(Acq staff member escorts Deb to Fran Krempasky's cubicle)

6. Payments, PPS Feed Process 11:30-12:00 noon  
(Adriene will rejoin group at Fran's cubicle and will take Deb to George Marck's office)

PPS feed process, FY close fiasco client fiasco, Log Express and first-tier support problems.