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## Acquisitions Technical Group Meeting

Wednesday, March 10, 2021

Meeting held virtually via Zoom

9:30 am

**Meeting Attendees:** see last page

**Call to Order:** P. Ramirez called the meeting to order at 9:30 am

**Introductions:** No one new to the group were in attendance.

**Additions to agenda:** There were no additions to the agenda.

**Approval of Minutes:** There were no additions or corrections to the minutes from the September 2020 meeting. Minutes of the September 16, 2020 were approved.

### CCS Staff Reports:

Rachel from CCS reported. The presentation slides are at:

<http://www.ccslib.org/documents/resources/acq-technical-group/1658-acquisitions-meeting-march-10-2021-staff-report-rachel-fischer/file>.

### Website Redesign Project

CCS has received bids from numerous companies and have selected two finalists for the website redesign project. Staff heard presentations from two vendor finalists and selected one company to be the vendor. Governing Board reviewed the contract at their February meeting.

### Polaris 6.6/6.7 Update

The training server has been updated to 6.7. (New Leap features include: serials check in, searching remote databases, saving Marc Records to the databases, some bibliographic bulk changes features.) Mieko and Rachel will be leading the 6.7 training sessions in March and April. Production will be upgraded in April after the training. There will be training for Technical Services on March 17<sup>th</sup> at 1 pm.

<https://training.ccslib.org/> includes a new section for Technical Services in Leap. This includes a serials check in course. The cataloging course has not been added. Once the 7.0 update is released in June, the cataloging course will be added.

The majority of all serials check-in functions have been added to Leap, however Leap cannot create new issues without predicting future issues, yet. Nor can labels be printed yet. Not enough copy cataloging records have been added to Leap for Rachel to

recommend using it as of now. De-duplication and editing Marc records will not be added until the 7.0 update in June. The update to 7.0 will NOT include spine label printing.

According to Innovative's Product Roadmap, the plan is to implement the Acquisitions API during the 7.0 update. More info will be coming as documentation is released.

API stands for Application Programming Interface. It allows software to send and receive data to and from the other programs. API supports the ability for third party vendors to pass purchase order data directly to Polaris in order to create a PO automatically. This automates workflow and reduces staff time spent creating purchase orders.

Vendors will need to develop an interface on their end and there is currently no information on when this will be completed. It may be before the API is released, or not. Vendors may also charge to use their API to send their information to Polaris. After the API is released, please speak with your vendors to see how to set this up on their end and how much they may charge for it.

This may be set up in Administration settings, CCS may have to help you set up an API key, which is like a password, which allows API to communicate with your vendors.

### **Unprocessed 970s Summary**

The 970 field in bibliographic fields are used to automate the process of creating POLIs. Processed note is added to \$9 field after it is used. If a 970 isn't used to create the PO, the \$9 isn't added – can happen when multiple copies are ordered or when the POLI is not created using that 970. This causes the information from an unprocessed 970 to be visible in the POLIs of other libraries if they order using that bib record. A different library's order may accidentally use it to create a POLI.

Bob has created a report that will help you identify and process 970s. This report is called, "Bibs With Tag 970 Without a Subfield 9". Please use that report to identify if your library has any 970s that need to be cleaned up. Example below of how it should appear.

EXAMPLE: 970 \$fAFI\$hWGKADFC\$Lwgk\$P14.69\$9Processed Feb 26 2021 11:27AM

Also, you can delete the 970s if you're not using them.

### **Duplicate On-Order Records**

Reports have come in on excessive amounts of duplicates. Purposely saving duplicate on-order records is acceptable when it is necessary to order the correct format or volume. However, Polaris can't deduplicate records automatically when there are already two records in the database. Please keep duplicate on-order records to a minimum. The duplicate detection settings in your import profile can reject the

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incoming record but add retention tags to the existing record. Please check your import profiles for on-order records are set up properly.

Two resources were given: Video tutorials on deduplication and a New Catalog Wiki page, Merging Duplicate Records.

Kathy asked via chat, 'How often is the Bibs without 970s processed report run and is the output cumulative?'

Rachel said she believes it's run weekly and the report will automatically update to remove any of the records that had the 970 corrected and add any new records that have the 970 in it without the processed note.

Question came in via chat, 'Does the 970 with processed get deleted?'

Rachel answered: Eventually there is a bulk delete.

### **099 Field**

Reports have continued to come in on the 099 field missing from the on-order records. Most likely from hand-keyed records and OCLC records and not vendor records. Please review the bib input standards.

### **Business:**

Jo Smolzer from Huntley: How are library's handling "no charge replacements from vendors?"

Jo said that they'd recently had an order that got lost through delivery, the item never made it to the library. Baker & Taylor had them pay the invoice and were going to send them as no charge replacements. Baker & Taylor has been sending books as they are available, so the books did not come all together. In order to pay the invoice, they had to receive everything, however, once received it shows the item is in process, but they are not, because they are not at the library yet.

Penny replied that they haven't had any since the start of Polaris.

Bill O. responded in chat, that they put a non-public note and change the status to repair in the item records until the item comes in.

Jo asked if the item is in repair does that stop it from being available for holds?

Penny and Brenda believed that was the case. Brenda said Ela only pays after item is in hand.

Lay from Palatine said: recently through Ingram, a package was never delivered and got sent back to Ingram. Palatine didn't have to pay for it. Ingram cancelled the invoice for them and they just had to reorder it. Damaged books which are paid for are kept track of and she makes sure that Ingram does send a replacement. It is left "in process" because if it's put in repair or

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unavailable a patron cannot place a hold. The damaged item is left on her desk until new item arrives. The damaged item is then tossed and the new item is handed to catalogers.

Keith W. said he pays first, then changes it to repair, keeps track with a spreadsheet. If it can't be replaced, he pays first and is issued a credit later on.

Kathy said, she believes patrons can place holds on the items with repair status.

Penny commented that if the item is in repair, a patron can place a hold, but it will not trap a hold.

Jo clarified that the report is alerting them that they have items in processing that have holds, so they are pulled first to get them through cataloging. Jo appreciated the idea to mark the items as under repair.

### **Cancellation notes in the 245.**

Victoria from Niles asked: When something gets cancelled on the publisher's end, and notification from Midwest Tape and Ingram comes through, should a note be put into the 245 bracketed after the title so people could see it? So, if there were holds on that item, the person putting the notice in the 245 would alert the acquisitions list. That way when each library saw that they'd be responsible for notifying their circulation department or whoever removes holds.

Is this a process that we want to do? How should it be handled going forward?

Brad from Cary, asked can they make sure it's a publisher cancellation and not just a vendor being unable to acquire item.

Victoria believes that the vendor specifies whether it's a publication cancellation or if the vendor just can't get the item. Victoria sends out emails about cancellations, but is wondering how other libraries may want to handle it.

Rachel thinks it's a good idea that emails should be sent to the acquisitions list so that they can cancel their own holds. Victoria asked if this could be documented and added to website.

Kathy suggested a dedicated acquisitions corner as opposed to everything falling under the cataloging wiki. Penny agreed.

Rachel decided to put it on the learning portal instead of the cataloging wiki, under the acquisitions procedures drop down menu.

Discussion ensued about cancellation codes through various vendors.

### **Bulk Adding POLIs to the PO**

Rachel reviewed the procedures for bulk adding polis to a purchase order, an efficient and streamlined procedure. She went over the 970 field and offered tips for bulk adding. Links were provided for documentation and video tutorials.

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Discussion about templates and using multiple templates ensued. Rachel pointed out \$h is very important. Lay added that \$h must be less than 10 characters or it won't match up to the correct template. Rachel confirmed this.

Kathy also added that with bulk add, anything that is matching to a multi-volume record, they have to handle those separately, if using the usual vendor record import profile, it will put multiple volumes into the first volume it sees. They set up a separate bib load to create provisional records so they could go through and make sure they are ordering the correct items.

Karin via chat said, she uses the same grid for multiple copies, then does a bulk change.

Lay asked about ordering graphic novels. Brad says through Ingram, they take the item off and manually adds the correct one. He suggests double checking before releasing through EDI to make sure it's the correct item.

Discussion about ordering graphic novels ensued. Rachel will add tips about ordering multi-volume items to the learning portal. Brad offered to assist Rachel.

**Announcements:**

Jo from Huntley announced that the Huntley library will be closed from Monday, March 15 through April 27<sup>th</sup> to move into their addition. They will have no phones and limited access to email as systems are installed. They may be slow in responding to anyone reaching out to them.

Rachel's slides from the ACQ meeting are now online at: <http://www.ccslib.org/resources-new/technical-groups/acq-technical-group>

**Adjournment:**

Penny motioned to adjourn. Brenda seconded.

Next meeting will be held June 9, 2021.

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**Attendance:**

<b>Library:</b>	<b>Name:</b>
Cary	Brad Peterson
CCS	Rachel Fischer
Crystal Lake	Penny Ramirez
Des Plaines	Lynne Rubio
Ela	Brenda Gornick
Evanston	Bill Ohms
Fox River Valley	Karin Nelson
Glenview	Deborah Kieres
Highland Park	Beth Phillips
Huntley	Karyn Petersen, Jo Smolzer
Lake Forest	Amy Begoun, Lynn Krambeer
McHenry	Keith Walker, Kathy Milfajt
Niles-Maine	Jamie King, Magda Wuehr, Amelia Karns, Victoria Pichla Luz, Lynna Ton
Northbrook	Barb Mayer, Brian Nelson
Palatine	Lay Diep
Round Lake	Tana Visser
Winnetka- Northfield	Stephanie Girardi