

Acquisitions Technical Group Meeting

Wednesday, September 16, 2020

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 and additions to agenda:

P. Ramirez welcomed all to the first Acquisitions Meeting of the 20/21 Fiscal year. There were no additions to the agenda.

Approval of Minutes: There were no additions or corrections to the minutes from the March 2020 meeting. Minutes of the March 11, 2020 were approved.

Election of 2020-21 Officers: Penny Ramirez announced that she is the chair this year as she was Vice-Chair last year. Victoria Luz from Niles volunteered to be Vice-Chair/Chair Elect. Brenda Gornick from Ela volunteered to be Secretary. It was asked if anyone else wanted to step forward to volunteer. No one wanted to add themselves to the slate of officers.

Penny then called for a motion to approve the election for Victoria Luz to be Vice-Chair/Chair Elect, and Brenda Gornick as secretary. (It was unclear on the recording who motioned initially – it may have been Kathy Milfajt) Lynne Rubio seconded.

Victoria and Brenda were approved in their new positions.

CCS Staff Reports:

a. Rachel

There weren't many updates to Polaris v. 6.5, however, there is a new manual for Acquisitions in Sharepoint. Rachel recommended using the manual for searching any questions. LINK:

https://ccsliborg.sharepoint.com/:b:/s/CCSTraining/Ea_TbIUETJBNhxSDD_7V54BbS09Y_TqOqSXQS_Wo3QrHbg?e=Hxo5GB

Reminder for On-Order records: There have been reports of on order Bibliographic records that are missing the 099 field for preliminary data. Be sure that vendor records come in with that field. Some of the records were coming in from vendors without it.

*Check your templates and grids to make sure all on order records contain:

099 PRELIMINARY DATA

*All 970 fields must contain \$I with three-letter code for your library

b. Debra

Grayslake and Palatine are now live in CCS and Polaris.

Items that are being worked on: CCS has identified over 12,000 duplicate bib records and have been slowly merging them over the past week. Currently, there are approximately just under 9,000 records that remain. Debra mentioned that if anyone were interested in volunteering to help merge these remaining records, to please reach out.

In addition to duplicate bib records there is the general data cleanup. If you encounter any issues, please submit a help-desk ticket to CCS. Grayslake and Palatine have been busy submitting their first orders, creating their first invoices, first EDI test orders. Congratulations to their teams who are continuing to work hard on this transition.

CCS is looking for feedback on how the migration was implemented and are always open to ways to improve the overall process. Please do complete the survey at <https://bit.ly/32BpFa0>

There are no further library projects on the radar as of today's meeting.

CCS has created online training courses. These courses are in-depth training materials for new libraries and for existing members. They are available to everyone at training.ccslib.org. There is an acquisitions training course that takes roughly 5-6 hours to complete. The courses were designed for onboarding Grayslake and Palatine, but CCS will be going back over the next few months to update and revise them as needed based on feedback that they receive.

If you've taken any of the courses, CCS is looking for your feedback. Additional suggestions for additional courses are always welcome.

The last item Debra brought up was the website redesign. At the end of September, CCS will be going back to the project. The timeline for the website redesign was updated. The RFP will be pushed back for Fall/Winter 2020 with the project being completed in Spring/Summer 2021.

Business

1. Credits – Kelly from Indian Trails had questions about partially crediting an invoice for processing

Rachel demonstrated different ways to apply credits in Polaris

- a. After an invoice has been paid, Polaris allows you to credit the entire invoice or specific items. To credit full invoice, open invoice, navigate to tools, select credit. Enter the check or voucher number, then the amount. To credit specific item, inside the invoice, right-click the item, scroll down to credit, enter information.

To distribute credits across multiple items on an invoice, the invoice needs to be in an "unpaid state". If invoice has already been paid, press 'undo payment' – hand holding dollar sign icon – or navigate to tools and select undo payment. Then distribute, credits, and fill in form as appropriate to your specific situation. Then pay invoice again.

For times when you receive a credit that needs to be distributed across multiple invoices, one way to do this is to calculate the amount and distribute it separately and apply a portion of the credit to each invoice – but you could also choose to adjust the expenditures to the fund.

Navigate to your fund, adjust fund balances, manually adjust total expended, add in negative amount for the credit and add a note for the credit memo.

No other questions on credits were expressed.

2. Delay holds X-Days past first available date – discussion (Jo, Huntley)

This is a new featured with the most recent update. Huntley library is interested in using this feature. They asked if any other libraries were using this new option. She had spoken with Anita at Lake Villa library which is currently using this feature.

Huntley had added this feature to their on order templates but are running into an issue with the selection remaining after importing. They have a ticket for this issue with CCS. CCS is investigating the issue.

A question was asked to clarify the use of this new feature.

The materials are still being shared, and holds are still being placed, but if delay holds is used, the library can select when other library patrons have access to have these holds filled. The date can be anything from 7 days to 30 days.

Debra shared her screen to demonstrate where it was located on the item record. The option is located just under the holdable settings. Normally, there would need to be a bulk-change to modify this time frame once the period of time was over. This option makes it an automatic change.

K. Milfajt explained how their library may possibly use this option in conjunction with their materials with new tape. Debra explained how this new option is not tied to material type, but rather just to holds and when they are eligible to be sent out to other CCS libraries to fulfill holds. An item may remain in a library's new section for 3 months or whatever time period is needed but it could still be eligible to be sent out to other locations.

3. Quarantine of new materials – discussion (Stephanie, Winnetka-Northfield)

RAILS has increased the quarantine time for materials that patrons have had in their homes. The question was raised on how long libraries are keeping materials in quarantine that have shipped from vendors. The question was also raised as to how long materials are held between receiving and processing and getting new materials out to patrons.

Draft

Lynne Rubio noted that they had conversations with vendors and the procedures that are being followed at warehouses. Because they are following strict procedures, Des Plaines is no longer quarantining materials from Baker and Taylor. Crystal Lake is not quarantining materials more due to the fact that there is limited staff. Niles is not quarantining after contacting vendors. However, boxes and mail are being held for one day before handling.

Several libraries commented in the staff. Northbrook was quarantining material for seven days. At McHenry, they are not quarantining once receiving from vendors, but there is a three day quarantining between staff handling.

Announcements – No announcements were made

Adjournment: Victoria moved to adjourn. Lynne Rubio seconded.

Meeting adjourned at 10:17 am

Attendance:

CCS Rachel Fischer

CCS Debra Wishmeyer

Cary Area Brad Peterson, Linda Conn

Crystal Lake Penny Ramirez

Des Plaines Lynne Rubio

Ela Library Brenda Gornick

Evanston Bill Ohms

Fox River Valley Karin Nelson

Grayslake Jan Davis, Marcia Hodgson

Highland Park Beth Phillips, Sue Therrien

Huntley Jo Smolzer, Sandy Homuth

Indian Trails Kelly B and Mary Godley

Lake Forest Lynn Krambeer

Lake Villa Vicki Roberts, Jean Humphrey

McHenry Kathy Milfajt, Keith Walker

Niles-Main Victoria Pichla Luz, Jamie King, Magda Wuehr, Amelia Karns

Northbrook Barb Mayer, Brian Nelson

Palatine Kristi Napolitano, Shelby Ricci, Lay Diep

Draft
Park Ridge

Gretchen Kottkamp, Lauren Bochat

Winnetka-Northfield

Stephanie Girardi

Respectfully submitted by Brenda Gornick, Ela Library

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