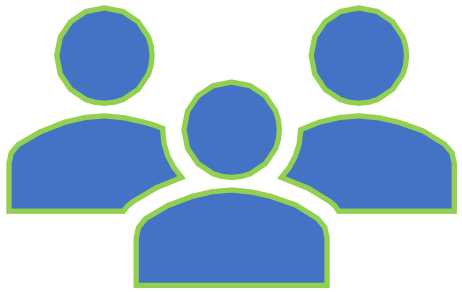# ACQ Meeting

RACHEL FISCHER

MARCH 10, 2021

Staff Update

Website RFP Update

- CCS received bids and selected two finalists.

- CCS heard presentations from two vendor finalists.

- CCS has selected a final vendor for the website redesign project.

- The contract reviewed by Governing Board 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 change features.
  - 6.7 copy cataloging functionality does not include deduplication or Marc record editing yet.

- 6.7 training sessions will be in March. I've scheduled the technical services training for March 17th at 1 PM.

- Production will be upgraded in April.

- https://training.ccslib.org/ includes a new section for Technical Services in Leap.
  - Serials course
  - The cataloging course and updates to the record sets course can't be created until the 7.0 update, which will be released in June.

Polaris 7.0 Update for Acquisitions

- The Acquisitions API:
  - "Support the ability for third party vendors to pass purchase order data directly to Polaris (automatically create a PO)."
  - "Automates acquisitions workflows and reduces staff time spent creating purchase orders."
  - Completion date: June 2021

- API stands for application programming interface. It allows software programs to send and receive data to/from other software programs.

- Unknown information:
  - Vendors will need to develop an interface on their end. We do not know when they will complete this.
  - Vendors may charge to use their API to send the order information to Polaris.

Recap on the Unprocessed 970s Issue

- 970s in the bibliographic records are used to automate the process of creating POLIs.

- A processed note is added to a $9 field after it is used.

- If a 970 isn't used to create the PO, the $9 isn't added.

- A different library's order may accidentally use it to create a POLI.

- Please review the Web Report, "Bibs With Tag 970 Without a Subfield 9," for unprocessed 970s to delete the field or add the $9 processed note.

- How to Correct Unprocessed 970s

EXAMPLE:
- 970   ‡fAFI‡hWGKADFIC‡lwgk‡p14.69‡q2‡9Processed Feb 26 2021 11:27AM

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.

- 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 can reject the incoming record but add retention tags to the existing record.
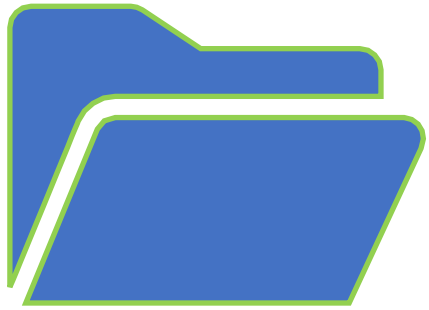
Resources

- Video tutorials on deduplication: Merging Duplicate Bibliographic Records

- New Catalog Wiki page: Merging Duplicate Records

099 Field

- Reports have continued to come in of the 099 field missing from the on-order records.

- This is probably in records that were hand keyed.

- Please review the bibliographic input standards with staff that hand key the on-order records.

Resources

On Order Bibliographic Record Input Standards

Bulk adding POLIs to the PO

The 970 Field

Subfields include:

$l : location (branch abbreviation)

$q: quantity

$f: fund

$c: collection abbreviation

$p: price

$m: material type code

$n: non-public note (less than 255 characters)

$h: item template code

Tips for Bulk Adding

- Using all subfields are not required, but helpful.

- Using all subfields means less manual work for the staff.

- Make sure your import profiles save records to record sets.

- PO Templates can be useful.

Bulk Adding POLIs to the PO

Document: Bulk Adding Bibliographic Records to the Purchase Order

Video Tutorials: Creating a New Purchase Order

Questions?

- Contact help@ccslib.org.