Packet
CCS Acquisitions Technical Group
CCS Office – 200 Tri-State International Drive, Lincolnshire, IL
Fishbowl Conference Room
Wednesday, September 20, 2023
9:30 a.m.

Minutes from the Previous Meeting

Agenda for this meeting (updated)

Staff Report

Polaris 7.4 Upgrade: As you know, production has been upgraded to Polaris 7.4. This upgrade added the ability to receive split segments and copy them to invoices. I've updated the Acquisitions in Leap online course and the instructions on the CCS website with information on these instructions. The following functions are still missing from Leap:

- ASN
- EDI processing of partial shipments
- Sub-fund management
- Adjust encumbrances and expenditures
- Create PO, bib, and item templates
- Create import profiles and full import
- Ability to uncancel a POLI
- Links in the bibs and items to the POs and invoices
- Rapid receipt
- Print vouchers
- Multi-fund editor
- Distribute charges and discounts across all line items
- Fiscal year rollover utility
- Acquisitions bug:
  - Does not process the EDI invoice properly.

A patch for the EDI invoice bug will be released with the 7.5 upgrade, if not sooner. The bug that caused the owner of the invoice to change when it was saved has been corrected. Additional functions are not expected until the 7.6 upgrade. Polaris has not provided a date for the 7.5 or 7.6 upgrades yet.

If your library does not use EDI or ASN, you are welcome to begin using Leap for manual acquisitions for your daily tasks. If you print vouchers for every invoice, CCS staff can help you to create a Web Report of the invoices as a substitute for the voucher. Adjusting encumbrances and expenditures will still need to be done in the Client. Please contact help@ccslib.org if you have any questions. The Acquisitions in Leap online course provides videos, software simulations, and links to instructions. I will schedule additional training sessions for a future quarter.

Warren-Newport Public Library: CCS welcomes Warren-Newport Public Library! Warren-Newport Public Library in Gurnee, IL has completed the process of loading the records into the database. Until we deduplicate the records

there will be a lot of duplicates in the database. If you'd like to volunteer to deduplicate the records, please contact me at rfischer@ccslib.org.

Resources to Go Along with the Demos and Reminders
- Miscellaneous Invoices
  - Client: https://www.ccslib.org/training/creating-and-paying-miscellaneous-invoice
  - Leap: https://www.ccslib.org/training/creating-miscellaneous-invoices-leap
- Shipping and Processing Charge
  - Client: https://www.ccslib.org/training/invoice-charges-credits-discounts
  - Leap: https://www.ccslib.org/training/editing-and-paying-invoices-leap#addcharge
- Bulk Add 970 to records that don't have them
  - Client: https://www.ccslib.org/training/bulk-adding-970-field-bibliographic-records
  - Leap: https://www.ccslib.org/training/bulk-adding-970-field-bibliographic-records-leap
- Standardizing/creating new records for video games
  - Guidelines for the final records
- On order record standards
- Vendor provided record standards
- Canceled publication procedures
- Deduplication instructions

Next meeting: March 20, 2024, on Zoom