

CCS Acquisitions Technical Group
September 20, 2023
9:30 AM - 11:24 AM
CCS Office

Meeting Attendees (attached)

1. Call to Order

- a. The meeting was called to order by Kelly Brungraber (Chair, Indian Trails) at 9:32 AM.

2. Approval of minutes from March 15, 2023

- a. Revision requested by Kathy Milfajt (McHenry) - amend attendance record to reflect Kathy's attendance.
- b. Revision requested by Deb Kissinger (Grayslake) - correct the date for previous minutes approved at the March 15, 2023 meeting, from Sept. 21, 2023 to Sept. 21, 2022
- c. Motion to approve revised minutes made by Brenda Gornick (Ela) at 9:34 AM.
- d. Motion seconded by Kassy Trejo (Evanston) at 9:34 AM.

3. Additions to the agenda - None

4. Officers Reports - None

5. Staff Reports

- a. See Rachel's report in the [Acquisitions Packet](#) that was emailed on Sept. 12, 2023.
 - i. Rachel Fischer (CCS) highlighted a few items, including:
 - 1. Receiving split segments in Leap 7.4
 - 2. Acquisitions bug in Leap 7.4
 - a. Rachel noted that Leap can be used for acquisitions for non-EDI orders
 - b. Rachel shared that a patch for the acquisitions bug should be included in the Leap 7.5 upgrade

3. Deduplicating records - volunteers welcome to help deduplicate records resulting from the addition of Warren-Newport records.

6. New Business

- a. Demos - Rachel (CCS) will record and post demo(s) after the meeting.
 - i. Miscellaneous Invoices
 1. Rachel (CCS) demonstrated creating and paying miscellaneous invoices in the staff client and in Leap.
 2. Rachel (CCS) demonstrated creating a miscellaneous invoice in Leap to record a credit by adding the credit to the header charges.
 - ii. Shipping and Processing Charges
 1. Rachel (CCS) demonstrated adding header charges (for shipping, processing, etc.) in the client and in Leap.
 - iii. Bulk Add 970 to records that don't have them
 1. Rachel (CCS) demonstrated (via Leap and the client) bulk adding the 970 field to all records in a bibliographic record set.
 - iv. Standardizing/creating new records for video games
 1. Rachel (CCS) demonstrated how to find the bibliographic record templates for video games that can be copied, and suggested referring to [the Cataloger's Wiki](#) for information on the 753 field.
 2. Lay Diep (Vice Chair, Palatine) requested standardizing preliminary data records for video games to include the video game platform in the title. PDRs for Large Print were briefly discussed as well; however, the decision was made to focus on video game preliminary data records at this time.
 - a. Rachel (CCS) clarified the request for Rebecca Malinowski (CCS), who agreed to allow a vote on the matter.
 - b. Kathy Milfajt (McHenry) moved and Victoria Luz (Niles-Maine) seconded:
For video game preliminary data records, adding the video game platform to the end of the title in

parentheses, in all caps following PDR standards, with terms matching those found in the Cataloger's Wiki (753, \$a).

- c. The motion passed unanimously by voice vote.
- d. Rachel (CCS) will send an email detailing the change to the ACQ, SCRAP and CAMM listservs.

b. Discussions

- i. Tips on identifying locked items - Rachel (CCS) recommends opening the Import Report and using CTRL+"F" to search for the word "locked" in order to quickly identify locked records. Other suggestions included, checking for the default price of \$0.01, checking for the quantity or amount that doesn't match, and using a default fund for an alert.
- ii. Add more than one grid to a title in the same cart - brief discussion regarding ordering multiple copies of the same title and methods for differentiating between material types within the same cart and/or PO. Some tips included:
 - 1. Copy the ISBN from a POLI, then paste the ISBN in a new workform and changing the material type
 - 2. Ad hoc bulk change after releasing the PO
 - 3. For Baker & Taylor carts, grids can be applied per item, allowing for multiple grids in one cart

c. Reminders (Rachel)

- i. Vendor record standards - Rachel (CCS) noted that the Cataloger's Wiki: On Order Bib Record Import Standards does not require a specific encoding level.
- ii. Canceled publication procedures - Rachel (CCS) reminded the group of the new Canceled Publications procedures. Brad Peterson (Cary) noted that only canceled publications should be added to the record set, and encouraged the group to double check publication status before adding.
- iii. Excess amount of records in the system - Rachel (CCS) highlighted the Cataloger's Wiki page for deduplicating records, and asked those willing to help limit the number of excess records by assisting with deduplication

7. Announcements

- a. Lay Diep (Palatine) - Violet Jaffe is leaving Palatine to be the director for the School of the Art Institute's Library
- b. Brenda Gornick (Ela) - Ela has a new director; Erica Christianson is taking over for Lauren Rosenthal
- c. Victoria Luz (Niles-Maine) - Niles-Maine currently has an interim director, Pilar Shaker
- d. Kathy (McHenry) - McHenry has an open full-time acquisitions position

8. Adjournment

- a. Motion to adjourn was made by Karin Nelson (Fox River Valley) at 11:24 AM.
- b. Motion seconded by Tana Visser (Round Lake) at 11:24 AM.

List of Libraries/Attendees	
Library:	Attendee(s):
Cary	Brad Peterson
CCS	Rachel Fischer, Rebecca Malinowski, Virginia Seward
Ela	Brenda Gornick
Evanston	Kassy Trejo
Fox River Valley	Karin Nelson
Glenview	Michael Gail, Niharika Shah
Grayslake	Deb Kissinger, Lauren Hilty
Highland Park	Sue Therrien
Huntley	Sandy Homuth
Indian Trails	Kelly Brungraber, Mary Godley, Megan Brown
Lincolnwood	Stephanie Haugan
McHenry	Kathy Milfajt
Morton Grove	Jeffrey Ray

Niles-Maine	Magda Wuehr, Victoria Pichla Luz
Northbrook	Brian Nelson
Palatine	Lay Diep
Round Lake	Tana Visser
Wilmette	Shanti D'Costa