Packet

CCS Acquisitions Technical Group

March 19, 2025 at 9:30 AM

Join the Zoom Meeting:

https://us02web.zoom.us/j/88552778063?pwd=cjBDQXZ1Nk5QWkF0cklOOWNEbzhWZz09

Meeting ID: 885 5277 8063

Passcode: 592817

Call in number: 312-626-6799

Approval of minutes from the Sept. 18, 2024 meeting: CCS Acquistions Tech Group Minutes 9.18.24.docx

CCS Staff Reports

Rachel Fischer:

- *Polaris Update*: The Polaris 7.7 update was completed on February 18th. This update adds some important technical services features. These functions include, but are not limited to:
    - Sub-fund management.
    - ASN receiving.
    - A deduplication button.
    - Side by side bibliographic record comparison and copying of fields.
    - Saving find tool filters.
    - Rerunning recent searches.
    - Creating record sets for saved or scheduled reports in Simply Reports.

    However, EDI Processing is still missing the button for processing EDI invoices in Leap. If the button is not used in the Client, invoices for ASN shipments are processed the night after they are received. Feel free to continue to use the Client to process ASN shipments using your usual workflow. You can learn more about the ASN functions in Leap at: https://www.ccslib.org/training/edi-processing-leap.

    CCS staff are still in the process of updating training documentation. If you missed the *What's New in Polaris v. 7.7* webinar, you can watch the recording at: https://youtu.be/YTcxFw1aMyQ?feature=shared.

- *API ordering update:* I should have an update on API ordering at the meeting.

- *Training Update:* I'm interested in scheduling Acquisitions in Leap training for the last week of April or first week of May. I will be covering all workflows available in Leap during this training session.

- *Change in access for Staff Client* - In case you didn't read the newsletter, there is a change that is being made to Staff Client Access on March 18th. Innovative and Clarivate are making changes to remote desktop access that affects Polaris staff client security. As part of this change, CCS needs to provide Innovative with all public IP addresses that member library staff use to access the staff client. Access to the staff client will be restricted to these IP addresses only. CCS previously gathered library IP addresses and have reached out to IT staff to confirm those IP addresses are still correct.

- *Call for next year's officers* – It's time to nominate new officers for the next fiscal year. Deb Kissinger (GRK) will be next year's chair. Please consider nominating yourself for vice chair/chair-elect or secretary. You can read about the officer job descriptions at: Technical Group Member Job Description.pdf.

Molly Mansfield – CCS welcomes Molly Mansfield to her new role as a Member Services Associate. She will introduce herself during the meeting.

Polls

Think about your answer to the following polls:

- Are you interested in changing the meeting time for the Acquisitions Technical Group to 10 AM? CAMM has recently changed their meeting time.

- If CCS scheduled in-person acquisitions in Leap training at the CCS office, would you be interested in attending? This would be in the last week of April or first week of May. In-person training sessions will be longer and have more time for hands-on activities than a webinar would.

Discussions

Think about your answer to the following discussion topics:

- Would it fit into your workflow to add the volume to the item record when it is ordered?

- How do you decide to set up your PO#. Is it by Category, Selection(Adult vs Juv), Vendor, or Date? Is there a reason why you do it this way, does it help you identify or just keep track of things better?

Potential Motion

- Motion to allow acquisitions staff to add the video format to the 245 field of on order records in all capital letters and in brackets.

    Background: At the September 20, 2023 meeting, Rebecca Malinowski confirmed that the Acquisitions Technical Group could pass motions on the local practices for the on order bibliographic records. At that meeting, attendees passed the motion:

    - For video game preliminary data records, adding the video game platform to the end of the title in terms matching those found in the Cataloger's Wiki (753, $a).

This allows acquisitions staff to easily identify the line items for the format that they need to receive. Lay Diep has made the recommendation to allow the video format in the 245 field like the video games.

Example:

245 00   ‡aLILO & STITCH 2-MOVIE COLLECTION [BLU-RAY]

Demonstrations/Presentations

- Finding and editing item templates in Leap

- Deduplicating in Leap

- Fiscal Year Rollover

- Allocating money to funds in Leap

Next Meeting: Date TBD

Location: Fishbowl at 200 Tri-State International Dr., Lincolnshire, IL 60069