

## CCS Acquisitions Technical Meeting Minutes March 19, 2025

### Meeting Attendees (attachment)

1. Call to order
  - a. The meeting was called to order by Lay Diep at 9:30 am.
2. Called for a motion to approve minutes from last meeting
  - a. Kassy and Brenda approved minutes. There were no additions.
3. There were no additions to the minutes.
4. Officer reports.
  - a. No reports from the Chair.
  - b. No reports from the Vice Chair.
  - c. No reports from the Secretary.
5. Old Business
  - a. No old business was discussed.
6. New Business
  - a. **CCS Staff Reports**

Rachel Fischer:

    - Polaris Update: Polaris 7.7 update completed on February 18<sup>th</sup>.

These updates add some important service features.

Sub-fund management.

ASN receiving.

Deduplication button.

Side by side bibliographic record comparison & 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, a recording is available.
    - API ordering update:

API workflow is a direct communication between Title Source 360 & Polaris. Rachel attended a new session on API and mentioned it is much more efficient than EDI, it might be a more nature flow if you haven't been using EDI. They have finished the Beta testing & are ready for release. It is only available at Baker and Taylor right now, Innovative is talking with InGram & Midwest Tape about API but they have not started the process yet.

There is a bug in API which prevents titles from appearing in reports such as Outstanding report, this would be helpful at the end of the fiscal year.

Discusses are there about a workaround but Rachel will be asking Rebecca and CCS Staff about it first, it could affect Polaris the next day if the workaround is implemented (before 7.8) Rachel will schedule a separate webinar TBA. 7.8 version will be available sometime this summer. Rachel did speak with a Baker and Taylor Rep. Tavis Kelly about delayed shipments. B&T have a contract with Hachette, they will get titles out 7-9 days before release dates. They are focused on new titles right now, he recommends that if you have any orders 3 months or more to cancel those titles, try to find them with other vendors or you can wait to see if B&T will get those titles. He stressed they are really focused on the new titles not the older ones.

You can contact Curt Leppert if you have older titles, you have not received, he will be able to do an audit to pinpoint exactly the problem. If Curt doesn't response Rachel will give you the VP contact information (contact information wasn't available at the meeting).

- Training updates will be scheduled for Acquisitions in Leap (Workflows available in Leap) the last week of April or first of May.
- Change in access for Staff Client: Access to the Staff Client will be restricted to these IP addresses only. CCS has gathered library IP addresses & confirmed those addresses are still correct.
- Call for next year's officers  
Please nominate new officers for the next fiscal year.  
Deb Kissinger (GRK) will be next year's chair. Please consider nominating you or vice chair/chair elect or secretary. A description of the officer's jobs is available if interested Technical Group Member Job Description.pdf.  
Debra is on maternity leave. Rebecca is taking on her role as well as her regular duties as Executive Director.

Molly

- Molly Mansfield introduced herself as the new Members Services associate, Congratulations!

**b. Polls**

48% yes 38% no opinion on changing the Acquisitions Tech. Group meeting to 10 AM.

17 members want to schedule a CCS in-person acquisitions leap training at CCS Office.

**c. Discussions:**

Lay asked if it is in your workflow to add the volume to the item records when ordering. We talked about the importance of having the volume # in the item record for patrons placing holds.

Lay made a motion to put it on the next agenda to discuss entering the volume in the item records. Rachel said she will present this discussion at the next catalogers meeting. We also discussed how we decide on our PO#. Some use fund code, the date ordered, vender name and date etc.

**d. Potential Motion:**

Lay made a motion to add brackets for 4K/4K combo video format to the 245 field of on order records in all capital letters (in preliminary data only). First Sandy H and Brenda seconded it. The motion passed.

Rachel said she would add it to the cataloger's Wiki.

**c. Reminders:**

If 024 field has a number beginning with 978 please remove it.

**d. Demonstrations:**

Rachel demonstrated:

Finding/editing item templates in Leap.

- Fiscal Year Rollover (Rachel will send link for fiscal year rollover slides)
- Molly demonstrated allocating money to funds in Leap

**g. Presentations:**

Heather Campbell demonstrated

- How to avoid purchasing unauthorized versions of movie/television DVDs.

Rachel demonstrated

- Fiscal Year Rollover (Rachel will send link for fiscal year rollover slides)

**Next Meeting: Date TBD**

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

<b>Library</b>	<b>Attendees</b>
Cary	Brad Peterson
CCS	Rachel Fischer, Molly Mansfield
Crystal Lake	April LaRosa, Lisa Gates
Ela	Brenda Gornick
Evanston	Kassy Trejo
Fox River Valley	Karin Nelson
Glenview	Niharika Shah, Michael Gail, Deborah Kieres
Grayslake	Deb Kissinger
Highland Park	Sue Therrien
Huntley	Linda Bargiel, Sandy Homuth
Lake Forest	Amy Begoun
Lake Villa	Heather Campbell
Lincolnwood	Stephanie Haugan
McHenry	Alesha Meads, Kathy Milfajt
Morton Grove	Jeffrey Ray
Mount Prospect	Ross Shanley-Roberts, Elaine Ball, Jong Alabado, Kathy Wohrstein
Niles-Maine	Lynna Ton, Magda Wuehr
Palatine	Lay Diep
Park Ridge	Dawn Pahlke, Lauren Bochat
Prospect Heights	AJ Czachura, Nora Mastny
Vernon	Jenny Krinninger, Alex Smith
Waukegan	Cynthia Hansen
Wilmette	Megan Brown