ACQUISITIONS MEETING NOTES

June 13, 2023 | 10:30 AM

Attending: Carol Witt - CW MARS, Meghan Cericola - CW MARS, Alene Moroni - Northampton, Ashley Ngan - Palmer, Autumn Mawhinney - Pittsfield, Becca Mastronardi - Chicopee, Betsey Dick - Amherst, Helene O'Connor - Palmer, James O'Malley - Worcester, Lesya Kreshchuk - Worcester, Marcin Marszalek - Amherst, Mary Wheeler - Pittsfield, Matthew Jaquith - Springfield, Stephanie Spackey - West Springfield, Susan Lucier - Westminster

1. **Introductions**
2. **Acquisitions Rewrite Development**
    - Quick overview of rewritten Acquisitions interfaces found in 3.8 - 3.11
        - Angular Rewrite of Acquisitions Administration Interfaces:
        - Merges functions in: Claiming; Currencies and Exchange Rates; Fund Administration
        - Various visual changes
        - Fund Debit Auditor Table
        - Active flag in Funding sources: enables/disables adding credits/allocating funds; won't show up as possible funding source when allocating to a fund
        - Further Angularization of Acquisitions Interfaces: Purchase Orders, Selection Lists; Line Item management (Receiving and Claiming; Creation of Line Items singly/in batches; Load MARC Order Records)
        - Support for Advanced Shipment Notices
            - Supports DESADV EDI messages created by vendors when they pack and ship items, and contain:
                - A list of dispatched POs, line items, and the number of items per line item
                - A package-level barcode representing the package as a whole
                - Staff can scan that package-level barcode to retrieve information on every item in the package, including an option to auto-receive every item in the box
        - New column for Purchase Order ID in General Acquisitions Search
        - New Permission for Fund Rollovers
        - Inactive funds can no longer make allocations or transfers
        - Line Item Detail Audit Table

- The current plan is to upgrade to 3.10.x during the October long weekend, although may upgrade to 3.11.x if it seems functional.
  - Training and documentation will be provided beforehand.
- Betsey: will vendors need to be set up for Advanced Shipment Notices? Carol believes that at least one of the major vendors is participating: Baker & Taylor "only right now" ("The Future: Ingram, Brodart, Midwest Tapes") per *Speed Up Receiving with Automated Shipment Notifications* presentation on June 24, 2022. Documentation for this isn't updated on the Evergreen site yet. 3.10.x has Acquisitions > Receive Shipment with a field for "Container Barcode" with a 'Receive on Scan' checkbox. No new administration fields (e.g. Provider EDI Attributes) were found.

3. **Fiscal Year Close/Fund Propagation Review**
   - Only relevant for Fund Tracking/EDI libraries.
   - See pages 16-18 of the Comprehensive Acquisitions Guide on the staff site under Cataloging > Acquisitions Module.
   - One Acquisitions library tried to transfer money between fund lines and was unable to do so because they had not applied credit to the connected Funding Source. Carol suggests applying credits to Funding Sources at the beginning of the fiscal year as part of the Fund Propagation task in order to help avoid negative balances and other potential issues.
   - Lesya: Is it possible to import a fiscal year's fund code allocations so they can be assigned to the next year to make it easier for libraries with many to do? **Carol will check** if it is currently possible or in development: neither, and would probably be quite difficult to set up in the database.
   - Lesya: Note that it is possible to add invoices to a previous fiscal year after the rollover is performed. **Carol will check**: we advise against doing this since the rollover both closes out the previous year's funds and moves over unspent money. It may cause trouble if trying to add invoices to a closed out year.

4. **General Discussion/Questions**
   - Carol has future plans to update the Acquisitions section of the staff site, breaking it down into smaller segments to make it easier to find instructions.

- Matthew: MLS has a guideline/policy about placing item barcodes at the top left corner of a cover. Where do libraries place them if doing that covers the title or author?
    - Betsey: Ingram will place lower during pre-processing per request; not lower than the top third
    - Matthew: Midwest Tapes shrinks covers for them so the full image is shown under blank space with room for the barcode
    - Becca: They apply by hand
    - Alene: They apply by hand and place lower, still in the top left quarter; Ingram and Midwest are responsive based on past experience
    - Mary: They use MLS placement and haven't had patron complaints; the circulation desk appreciates the uniformity
    - James: B&T pre-processes standard books at the top left; they make adjustments for DVDs/CDs; they place barcodes on the front covers of graphic novels
        - They have an auto-handler that checks in material and haven't heard of any issues finding barcodes for other libraries' materials.
- Mary: Changes to the Metabase reports moved the filter boxes to the left, and she can't use the Fund Balances table now to print monthly reconciliation: there's lots of blank space and only a few lines appear. She's gone back to using the legacy statistics. **Carol looked into it** and informed John: he said it's fine to use the legacy statistics; printing reports from Metabase doesn't work very well, so suggested downloading and editing them as desired before printing. If printing from Metabase, try printing in portrait rather than landscape.
- Discussion of an email sent this morning re: IngramExpress service to get books quickly without cataloguing/processing. Nobody seems sure that it is worth setting up another account or about the separate discount structure. Mary forwarded the email to Carol.