5th Meeting of OPAL Acquisitions Special Interest Group  
Friday, December 2, 2011, 10am-2pm  
OhioNET, 1500 West Lane Ave, Columbus OH

**Attendees:**

*In Person:*
Joy Plassman, Trinity (Chair)  
LuAnn Boris, Franciscan (Vice Chair)  
Elizabeth Zeitz, Otterbein (Secretary)  
Elaine Funk, Muskingum  
Jamie Reinhart, CCAD  
Mary Jean Johnson, Bluffton  
Anastasia Guiler, Mount Union  
Mairi Meredith, Findlay

*Online:*
Blair Mercier, Malone University  
Linda Warren, Heidelberg  
Susan Furniss, OHIONET

**Agenda: as sent ahead of time by Joy Plassman:**

1. Welcome/introductions
2. Approval of Minutes from April 15, 2011
3. OLD Business:
   a. Acquisitions web page – questions or recommendations?
   b. Suppression of order records as “recommended practice”?
   c. How are OPAL Acquisition page links working for you, and does anything need added?
   d. Jeannie VonDeylen’s suggestions from April
   e. OPAL mentoring – who is current Training and Mentoring Coordinator?
   f. Report from Susan
4. NEW Business:
   a. Round Robin
   b. OhioLINK OCLC Collection & Circulation Analysis Project 2011
   c. Other
5. Adjourn

**Call to order and introductions.**

**Reading of minutes from previous meeting:**
No revisions or corrections were suggested.
Joy proposed minutes for approval, LuAnn and Elaine seconded.
Please send to Andrew Whitis to have the “DRAFT” notation removed from the minutes.

**Old Business**

**Training Opportunities:**
- There was some desire to revisit the topics of a visit by Matt Polcyn, et al, observations by other Acquisitions User Group members, and training.
- Question was asked: Who do we go to for training?
Answer is that it is still Julie McDaniel, Urbana Library Director, who is the OPAL Training and Mentoring Coordinator. She can coordinate any sort of training opportunity anyone would like.

- She can be contacted at the following:
  - Phone: 937-484-1337, jmcdaniel@urbana.edu

Joy will talk with Julie about collective training opportunities and get back to the group.

**Regarding the redesign of the Acquisitions OPAL website:**

- Matt is working on implementing our previous suggestions.
  Perhaps something else that could be done is to move the Acquisition checklist from the “New Staff Checklists” to the Acquisition’s webpage for easier access.
- We hope that the redesign will include the ability to link from within pages to other pages within the Acq page.
- Jeannie’s list from our last meeting has been given to Matt and is being used as the example of our intentions:
  - The main page would consist of the first items, then each subsequent bullet point is a level deeper into that link.
    - Agenda (or perhaps Committee Statement of Purpose?)
    - FAQ
    - Minutes
      - Archives
    - Committee List
    - Contacts
    - Training Dates
    - Resources
      - Manual
      - Sharing Acquisition Tips
      - Quick Links
        - Tickler
        - Fund Activity Reports
        - Fiscal Close
        - Create Lists & Reporting
        - Statistics
        - Clearing Payment History
  - The only addition was a suggestion that we add a tips or shortcuts page containing member’s suggestions.
    - Someone within the group would have to be the “generator” or “holder/sharer” of such a list
    - It was suggested that we use the List-Serv to communicate these tips
    - The Secretary of the Acq Users Group will capture these tips as they come around and have them posted to the website twice a year, when the meeting notes are posted.

**Regarding the suppression of order records:**

- Bluffton recommends the unsuppression of order records because it aids in collection development.
Susan referenced the OShare email regarding unsuppressed order records and the request to shorten the period wherein those records show in the catalogue. The email survey generated much discussion, which resulted in no change to the 30 day time limit. Those libraries who unsuppress their order records are reminded that they can suppress them at the time of cataloging. The email survey discussion is included in these minutes as Appendix A for reference.

Several other institutional representatives commented that unsuppressed order records do not work for their institutions’ needs and would serve to confuse users who have little familiarity with the system. Seeing an order record would likely lead some users into thinking that the title is available for checkout.

Alternative ways of identifying collection development information (such as utilizing Millennium to see if other libraries have a copy of any particular book on order, looking at OPAL, etc) were discussed.

Susan noted that it is possible to view the public record from Millennium:

- View – history
  - Public View
- OhioLINK
- You can use the i-type to indicate circulation/not circulating

A brief discussion was had about the different workflows used by each institution and the need to keep elements of acquisition flexible for adapting to each institution. This need for institutional flexibility as well as consortia agreements was a recurring theme in the conversation.

The recommendation from the users group is that the suppression of order records should be left to each individual institution’s discretion based on what is best for that institution and its users. The request was made that each institution please revisit this discussion on opening order records to view by catalog users and if it is deemed appropriate for their constituency then open them to public view.

Rule of Thumb for Cataloguing Time Frame:

- Blair asked if there was such a rule of thumb
- The general answer was that it depends upon each institution, their size, other duties, etc.
- Linda said that it takes their cataloguers about a 5-10 days from order to available for rush books, and 2-3 weeks to get items out to the collection for others, depending upon the circumstances at the time.
- Blair wondered if anyone has a time scale of 4-6 months?
- Some wait until the summer to catalogue, some take a month or two

It was suggested that AmazonPrime membership is a convenient and easy way to obtain materials cheaply and quickly. If questions, please contact Elaine Funk (efunk@muskingum.edu).

New Business

Christine Morris: eResource Discounts

- We now have access to standing discounts with Ingram, B&T, and Brodart. These documents were submitted with the notes and should be available online.
• Please note that if you have an existing account with B&T, there may be some problems trying to use the new OHIONET discount. If you experience difficulties, please contact Christine Morris (christinem@ohionet.org).
• Some information can be found at the OHIONET webpage, www.ohionet.org, under Products & Services, Library stuff (http://www.ohionet.org/category/category-string-blog/library-stuff)
• Mary Conroy continues to be the contact person for all things related to eResource content, but Christine Morris the contact person regarding these discounts.

Round Robin
Templates:
• Remember that OHIONET can adjust your templates – just contact OPAL Help.
• Recommend reviewing your templates – do you need to add or subtract any fields? Change anything?
  o Settings
    ▪ Record templates:
    ▪ Use the arrow to move over new templates or remove old ones
    ▪ Save Settings
• The only templates you will see are the one’s you’ve set as your ‘preferred’ templates

Brief Bibs:
• Bluffton engages in limited use of brief bibs and typically links to the record from the start of their workflow.
• CCAD never links to anyone’s brief bibs.

Use the key shortcuts to change searchable fields. If you click in the Index drop down, the following letter codes or key shortcuts will change the searchable index:

<table>
<thead>
<tr>
<th>Letter</th>
<th>Searchable Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>t</td>
<td>title</td>
</tr>
<tr>
<td>a</td>
<td>author</td>
</tr>
<tr>
<td>c</td>
<td>LC Call No.</td>
</tr>
<tr>
<td>f</td>
<td>NLM Call No.</td>
</tr>
<tr>
<td>j</td>
<td>MESH</td>
</tr>
<tr>
<td>h</td>
<td>Local Call No.</td>
</tr>
<tr>
<td>s</td>
<td>Series/Unif. Title</td>
</tr>
<tr>
<td>d</td>
<td>Subject</td>
</tr>
<tr>
<td>o</td>
<td>OCLC No.</td>
</tr>
<tr>
<td>i</td>
<td>ISBN/ISSN</td>
</tr>
<tr>
<td>g</td>
<td>Govt Doc No.</td>
</tr>
<tr>
<td>m</td>
<td>Dewey Call No.</td>
</tr>
<tr>
<td>.</td>
<td>Record No.</td>
</tr>
<tr>
<td>b</td>
<td>Barcode</td>
</tr>
<tr>
<td>w</td>
<td>Keyword Note</td>
</tr>
<tr>
<td>l</td>
<td>SICI No.</td>
</tr>
</tbody>
</table>

Use of “limits” can make searches easier.

How do we notify faculty when their books are ready?
• “Hold” email from the circulation system
• Use of the Tickler feature
• Other systems to send automatic emails

eBooks & eBook Readers:
• Muskingum has the NOOK and Kindle in their circulating collection, though they only circ to faculty and staff. Even then they don’t circulate much. There is limited demand at the time of our meeting.
• Purchase for the Kindle is linked to a specific purchasing gift card.
  o Anyone can try and download books but since there is only one purchasing card, their purchases get declined.
  o If a user deactivates the library’s account and then syncs a Kindle to their personal account they can buy and use books from their own Amazon.com library. When the Kindle comes back the library account is reinstated and reregistered.
• NOOK purchases are loanable using email addresses.
• Franciscan does as well but they don’t get much use.
• Bluffton is seeing an increase in demand for eResources in the fields of sciences and business.
• CCAD buys mostly eBooks in the field of computer science, not really much more than that. Not even the students demand much more.
• Many other schools were not seeing an increase in demand for eResources, or really any demand at all.

We met Eric, who is working on the OPAL Help desk and the networking proxy.

**Spending the budget:**
Mara asked the question, what do people do if faculty have access to the budget but aren’t spending? Mount Union emails the department representative, secretary and library contact with the appropriation amount, expenditures, and amount remaining
Other libraries use the posting fund reports to generate the information and then send that information to the departments

**Suggested Topics for Next Meeting:**
• **Weeding and Space Issues**
  o eResources as an alternative
  o Periodicals weeding
  o (From LuAnn): What is the most effective or accurate way to gauge circulation statistics?
  o There was proposed or in planning a possible training session regarding how to gauge best practices for gathering statistics through ACRL, organized by Julie McDaniel, tentatively scheduled for March. Could this topic of how to generate an accurate weeding list also be a possible topic for the next OPAL conference?
  o (From Bluffton): Bluffton has reduced their collection in the last 10 years by 40,000 items; 10,000 items were reduced this last year alone. There was also a significant reduction in holdings for periodicals for the same time period.
• **Ideas about information commons and the use of space**
• **How collection development impacts weeding, information commons, space usage, etc.**
• **Muskingum has been asked to bring more information about their eReaders project, including pros and cons, etc.**
• **Elections**

**Next Meeting:**
**Thursday, April 19, 2012**
**10am – 2pm, OHIONET**
Appendix A: the email conversation regarding unsuppressed order records:

Here are the results of my question to you all:

11 libraries replied; 6 of those do display the order information in the catalog.

None of the 6 were in favor of shortening the 30 days except one who said 21 days would be ok, but no less. Three of the 6 suggested suppressing the order record at time of cataloging if that is before the 30 days is up.

So – no request for change to the system setting will be made at this time.

Thanks very much to all who responded!

Kathleen Aufderhaar, Librarian
Technical Services/Systems
Musselman Library
Bluffton University

From: oshare-bounces@lists.opal-libraries.org [mailto:oshare-bounces@lists.opal-libraries.org]
On Behalf Of Aufderhaar, Kathleen
Sent: Thursday, October 27, 2011 2:48 PM
To: oshare@lists.opal-libraries.org
Subject: [oshare] To libraries displaying order records/info in the OPAL catalog

Hello,

If your library does NOT display order information in the catalog, you can likely hit the delete key (unless you're interested or curious).

Some OPAL libraries display order information in the catalog – for example, a box will say “1 copy in process for Bluffton Book.” The system is set to show that message for 30 days following the date in the Received Date field in the order record. We’ve noticed that it often happens that we have cataloged the item quite a bit before that 30 days is up, and it becomes confusing to see the regular item information with call number and status plus the box right below it saying there is an item in process (which is the same item, not a second one!) Here's a sample of what it looks like:

<table>
<thead>
<tr>
<th>AUTHOR</th>
<th>Fromm, Erich, 1900-1980.</th>
</tr>
</thead>
<tbody>
<tr>
<td>TITLE</td>
<td>The heart of man : its genius for good and evil / Erich Fromm.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LOCATION</th>
<th>CALL #</th>
<th>STATUS</th>
<th>MESSAGE</th>
</tr>
</thead>
<tbody>
<tr>
<td>BLUFFTON BOOK</td>
<td>BJ45 .F68 2010</td>
<td>AVAILABLE</td>
<td></td>
</tr>
</tbody>
</table>

1 copy being processed for BLUFFTON BOOK.

test

DESCRIPTION 152 p.; 23 cm.

So:
1) Which libraries do display the order information in the public catalog?
2) Those of you who do – would you object to changing the setting to display that information for a shorter length of time, such as 14 days? Any other suggestions?

No matter what length of time is chosen there will be some items that get cataloged in a shorter time, and some that won’t get finished within that time period. These days at Bluffton, the majority of our new items do go through fairly quickly and we’d like to make the interval shorter.

Please reply directly to me at aufderhaark@bluffton.edu.

Thank you for your assistance,

Kathleen Aufderhaar, Librarian
Technical Services/Systems
Musselman Library
Bluffton University