Attendees:

*In Person:*  
Fran Fleet, Tiffin (Chair)  
Elizabeth Zeitz, Otterbein (Secretary)  
Linda Warren, Heidelberg  
Jamie Reinhart, CCAD  
Elaine Funk, Muskingum  
Jeannie VonDeylen, Defiance  
Anastasia Guiler, Mt. Union  
Mairi Meredith, Findlay  
Joy Plassman, Trinity Lutheran Seminary  
LuAnn Boris, Franciscan  
Susan Furniss, OHIONET  
Matt Polcyn, OHIONET

Agenda: as sent ahead of time by Fran Fleet:
1. Call to order
2. Introductions
3. Approval of Minutes – November Meeting
4. Old Business
5. New Business
   a. Elections
   b. SAT – Sharing Acquisitions Tips
   c. Next meeting date
6. Acquisitions Statistics – Susan Furniss, OHIONET
7. Adjourn

Minutes of previous meeting were approved with no revisions or corrections.

Elections:
The Acquisition User Group Officers for the 2011-2012 year are:
Chair: Joy Plassman, Trinity
Vice Chair: LuAnn Boris, Franciscan
Secretary: Elizabeth Zeitz, Otterbein

Please post the officers to the group membership list.

Sharing Acquisition Tips:

Review of currently posted Acquisition Standards & Procedures guide on OPAL website
- Discussion of the procedures and elements that keep some people from following them
  - Time
  - Other job expectations
Discussed which institutions followed and which didn’t
- The majority of institutions represented followed the posted Standards
- Discussed the use of templates and the variety of ways a template can be set up by OHIONET to meet each institution’s needs
  - Can have different templates for
    - Books
    - Reference books
    - DVD’s
    - CD’s
    - Serials
    - Etc.
- Some discussion regarding brief bib creation, especially title fields and how they’re entered
- **Group conclusion and recommendation** – The Acquisitions Standards and Procedures as posted stand as the guide for the group.

Discussed acquisition work flows
- Creation of information cards
  - Purchased from library supply companies like Gaylord or Demco
  - Printed from vendors like YBP
  - Homemade
- Use:
  - Printed at time of purchase with bibliographic & purchasing information
  - Passed along with book to cataloguer and also contains:
    - Title, vendor, order date, eprice, rec date, price paid, inv date, order number, bib number, fund code, requester & any requester information

Discussed that some institutions create lists to track items purchased on a daily, weekly or monthly basis
- Combine this reporting with the use of the Tickler function in Millennium to notify faculty

Discussed the idea of counterpart visits – observing OPAL members at different institutions to see how different work flows, systems, etc function
- Can contact Julie McDaniel, Library Director, Urbana, who is the current Training and Mentoring Coordinator to set these up

Discussion of OPAL Website – Susan Furniss
- Reviewed the features and information contained therein
- Mentioned that the OPAL conference would be Aug 11-12, with Friday being held at Mt. Union
- Be sure that your name is reflected in all the pertinent lists for which you are an active member
  - Talk to your library director if anything needs changed
- Resources & Support Training
  - How can the OPAL page be more searchable and user-friendly?
    - Send suggestions to OPAL
- Actionable Items: Improve the Acquisitions Page
Redesign? Break down into more sections?
  ▪ Add more resources - identify and provide resources regarding areas or topics raised at meetings
    • Tickler directions & usage suggestions
    • Clearing payment history procedures
  o Create a central page with links leading to other areas

Jeannie VonDeylen, Defiance, provided the following suggestion for the Acquisition Page Design:
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?)
    o FAQ
  • Minutes
    o Archives
  • Committee List
  • Contacts
  • Training Dates
  • Resources
    o Manual
    o Sharing Acquisition Tips
    o Quick Links
      ▪ Tickler
      ▪ Fund Activity Reports
      ▪ Fiscal Close
      ▪ Create Lists & Reporting
      ▪ Statistics
      ▪ Clearing Payment History

Changes? Suggestions? Please send any comments through the ListServ and possibly we can get started on these changes before our next meeting.

Some discussion of the recently-voted upon IUG enhancements and how the process functions.

It was suggested by Fran Fleet that a good idea is to invite Matt Polcyn and his team to each institution for a day’s review of
  • What are we doing right?
  • What are we doing wrong?
  • What’s new?
  • What can we improve upon?
  • etc.
Millennium Statistics – Participative Training
The rest of the meeting was concerning a hands-on training regarding Acquisition Statistics and was hosted by Susan Furniss, with input from Matt Polcyn, both of OHIONET. Please see Susan’s PowerPoint for reference. The PowerPoint was mailed to attendees of the meeting, please contact them if you need it resent. Thank you.

Here are Susan’s notes from an email she sent after the meeting:

1. The question was posed as to whether it was possible to set up different fiscal year starting months or if it was the same setting for every OPAL library. We found out that it is possible for each accounting unit (library) to have different fiscal year starting months. This would require us to request this service from Innovative. So just let us know if you would like to set up a different fiscal year time period for your library.

2. In support of Matt’s demonstration on exporting information to Excel - following is a link to a specific Mill Tip outlining the export process:


3. As limited as they are - I have attached the slides from the meeting. I hope they will be of some use for statistics.

4. Thank you for your comments about the OPAL website. In the coming weeks we will be reviewing how we can make it better and easier to search - so if you think of any additional suggestions please send them to us.

Next Meeting:
October 7, 2011
10am – 2pm
OHIONET