3rd Meeting of OPAL Acquisitions Special Interest Group
Friday, November 5, 2010, 10am-2pm
OhioNET, 1500 West Lane Ave, Columbus OH

Please note that some technical information may be transcribed wrong. If any errors are spotted, please send the correction to Elizabeth Zeitz (EZeitz@otterbein.edu). Thank you.

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
Susan Furniss, OHIONET
Matt Polcyn, OHIONET

Via Elluminate:
LuAnn Boris, Franciscan

Agenda: as sent ahead of time by Fran Fleet:
I. Call to order
II. Introductions
III. Approval of the minutes of the April meeting
IV. Millennium Updates – Susan Furniss
V. Review Elluminate recording on Acquisition Statistics
VI. 2011 OPAL Annual Conference Participation
VII. “Share & Tell” – hints and questions
VIII. Next meeting date?
VIII. Other

Pre-Meeting Items:
Matt Polcyn can share how to use Excel to sort and generate data pulled from Millennium

Fran asked how to ensure you get an accurate count for the number of items purchased statistic at the end of the fiscal year
• Create a list
• Criteria - paid date
• Exclude multiple volumes
• Final number is your final number of items purchased

Call to order and Introductions:
Welcome and explanation for our new attendees (Welcome!) of the meaning and responsibilities of an “interest group”.
• We can meet when we want
• We have decided to take minutes
• We are not bound by standing committee rules, ergo we are less formal

Then a brief history of the committee was offered:
• It was a standing committee until about 1999, when it died off. We started it again roughly two years (Thank you, Susan!) and have had two meetings a year, in Autumn and Spring.
• Our purpose is to compare notes, share information, and help one another.

Discussion and Acceptance of Last Meetings Minutes/Notes:
• Reviewed the highlights for those new attendees
• Discussed that our selections for service options seemed to have been included into the strategic plan
• Notes/Minutes stand Approved as on website.

Millennium Updates:
Most recent iii update was numbered 2000b and the following changes affected Acquisition module
• Message field pops up in the order record during updating/invoicing
  o Allows pop-up message for next time record is accessed
  o Same as in the item/patron note fields
• Fund codes can now be up to 15 characters long
• All other updates had to do with Edifact
  o Edifact is an electronic ordering standard for placing order with vendor directly through iii while creating the order record in Millennium
    ▪ Allows for direct placement of orders without leaving Millennium or going to vendor websites
    ▪ Also handles invoicing
      • Mt. Union does this with Bookhouse if anyone has questions as to how it operates
      ▪ Is also useful for queuing PO’s based on approval of items suggested for consideration via slip plans
• Create List function now allows for the limiting of payments within a specific time frame when you export the paid field

Statistics Questions – Presentation of Elluminate Session on Statistics by Susan Furniss
How to get to it: OPAL – Resources & Support – Training – Elluminate Training Archives (note – this is password protected) – Acquisition Statistics
The direct link is provided here.
Please review the training session at your leisure. The following notes are not a complete recitation of the presentation.

How to get accurate statistics depends on what you’re looking for – for almost any piece of data, there are numerous ways to go about obtaining that data
It helps to understand the Statistic functions and how they operate and what they mean

Suggested yearly reports:
• Orders placed last fiscal year
• Orders received last fiscal year
• Orders paid last fiscal year
• Total number of media orders
• Total number of orders by selector
• Total number of orders by vendor

You can generate three types of reports in Statistics:
• Field statistics
  o Separate reports for each field stat within a time range (paid date and invoice date)
  o Raw counts are one dimensional
  o Useful for Collection Development and Budget Planning Reports
  o Best for reports with two time periods where you want to project calculations based on the two time ranges
• Periodic report
  o Date fields fall into specified date range
  o Reports with multiple time ranges
  o Limited use with Collection Development or Budget Planning
    ▪ Please note: if using the Bib Record information the “copies” field draws from ALL OPAL holdings. Record Count View shows only your institution’s holdings.
• Cross tab report
  o Across order records and within two pieces of information
  o Two specific fields examined together

Other useful Reports:
Location
Funds
Vendor

Sidebar discussions during the presentation:
Telnet vs Millennium
• Acquisition functionality eliminated in Telnet
• Current primary universal use of Telnet is in the changing of passwords
• Some use Telnet for cataloguing

How do you determine exactly how much money has been spent in a fiscal year?
• Funds tab shows you total appropriation, expenditure, encumbrance and free balance for each fund code

To free an encumbrance
• Change status to “z” (cancelled) to negatively encumber those funds thus freeing those funds
• Can also change your e-price to $0.00
• After fiscal close, send a list of the “z” status items to OhioNET to be deleted

“Share & Tell” – Hints and Questions:
• Criteria for deletion by OhioNET:
  o Status must be “a” (fully paid) or “z” (cancelled)
  o Don’t send things that are part of this current fiscal year
• How do you handle charges separate from the cost of the book, i.e. shipping or processing charges, like book jackets?
In the invoice field you can enter the extra charges into the shipping field or the other charges field.

- You could just enter a grand total and ignore the breakouts.
- You could create a special fund and track those charges that way.
- Create a y-record which doesn’t prorate to individual items (the following from the Millennium manual):
  - Create an invoice.
  - On a new line on the invoice, enter a y as the first character of the record number. This record number can be up to 11 characters and cannot contain the pipe (|) character. Millennium Acquisitions displays a dialog in which to enter y record information.
  - In the "Creating X or Y Records" dialog, enter the Fund, Encumbrance to be removed, and the Amount of payment. You may also enter a Note of up to 35 characters.

If your library uses subfunds, you must also enter the Subfund.

- Choose OK to return to the invoice. Choosing Cancel clears the y record line item.
- Finish creating the invoice as described in Creating Invoices. You cannot "finish" an invoice that contains only y records. The invoice must contain at least one "real" order record.

Y-Records and Vendors

If the invoice you are creating already has a vendor, Millennium Acquisitions uses that vendor for the y record; however, if the y record is the first line item in the invoice, Millennium Acquisitions prompts you to enter a Vendor name from the list of vendors.

- How does Millennium relate to your on-campus accounting system – do you have to balance them each year?
  - Is it possible to get them to reconcile?
    - Most systems don’t communicate with Millennium so reconciliation must be done manually.
    - Some schools do, but it’s never a 100% match. There is always unexplained variance.
  - Do many schools track the campus budgeting and compare it to Millennium over the course of the year?
    - Some do, but it’s again not 100% accurate.

Vendor Licensing: Media Purchases

- How do you handle your media licensing restrictions?
  - Most don’t circulate their DVD’s through OhioLINK
  - Any licensing restrictions are noted on the material’s record
  - Items are generally made Local Circ Only
Procedures and Processes – Differences between institutions:

- Some create order records at the time of ordering, and some create the order records only when the material has arrived.
- Some schools have the cataloguers import the order information and some have the acquisition staff do that later.
- Some schools use ticklers to generate a selector notification email at the time of invoicing and some send out email notifications after cataloguing and as part of the order import step.
- Some schools generate order records for gifts that are being accepted into the collection and some don’t. It all depends on how your end-of-the-year reports are generated.
- Some use blanket PO’s, some don’t.
- We all use and invoice Amazon differently – some wait till the monthly statement and some use each shipping receipt as a per-order invoice, then just reconcile the statement at the end of the month.

2011 OPAL Conference Presentation (to be held at Mt. Union)

- What would it be? A Breakout Session? What would we be interested in doing? Should we just meet for a short time during lunch? Nothing?
- Please send any ideas or suggestions through the Acquisition ListServ or to Fran Fleet, Tiffin, as soon as possible.
- One suggestion was to clarify and standardize terminology and clarify usage/approaches.

Other:

**ASSIGNMENT:**

- Please review the Acquisition Standards and Procedures document found [here](#). Please carefully review the current document and look for any changes, updates, or deletions that have been made necessary by current Millennium operation.
- Consider how you follow these guidelines – do they need updated to reflect current operation? What should change?
- Communicate your observations and suggestions through the Acquisition ListServ.

Next Meeting:
The 4th meeting of the OPAL Acquisition Special Interest Group will be **Friday, April 15, 2011, from 10am to 2pm at OhioNET.**

Agenda items will include a hand’s on training session in the OhioNET computer labs to practice using Millennium Statistics via real-life questions and scenarios.