Polaris Acquisitions Forum

Moderated by Lauren Herring

* Circulation staff and catalogers are hand typing on-order item records. Is there a better way to do this?
	+ Yes – Use the import profile in Polaris and grids from your vendor. Take the record set from the import and create a purchase order, verify errors or questions, and release the order. This will create on-order item records.
* Is there a better way to overlay import records?
	+ Is there a way to minimize a way for ISBNs to not go to the bottom of the bib record but to the top?
	+ Someone thought this was possible through an SA setting.
* Do the BNT records have an OCLC number?
	+ Yes. We pay OCLC to do this. You can get Baker and Taylor records from OCLC. Build a cart in BNT and then download the records into Polaris. At the same time, the records are suspect. Baker and Taylor will send an email alert that you have a batch of MARC records ready in OCLC.
	+ Brodart processes live on one library’s system and send the records to OCLC.
	+ OCLC vendor record contribution program. Vendor sends info to OCLC and tags it back to your order.
* Acquisition has always been manually input. Any argument for staying with manual?
	+ NO!!! Use EDI and/or ASN.
* What is the ideal workflow?
	+ Start with your vendor and get a contract for discounts and customized services. This will help streamline your acquisitions.
* Just migrated about a year ago and decided not to use EDI and implement later on. How do I implement?
	+ Get with your vendors to work with set up. Tell them you are doing Polaris. Make sure vendor is an approved EDI vendor. There will be an additional cost for each vendor. Work with site manager.
* Do you receive partial shipments with ASN and do you have problems with this?
	+ We had issues and had to shut off ASN. Two years ago – library got too flustered.
	+ Both will go through but two different lines – some little issue. The problem with partial shipments is we have a hard time identifying the second shipment part because we want it to go straight out the door and not spend time in cataloging.
	+ BNT can set up to receive no partials. They say the delay time is minimal.
	+ Can you clarify if this is partial in a PO or partial in a POLI? Partial shipment of boxes. Sometimes we will receive 6 instead of all 20 and have to wait for the other 14 boxes to arrive.
* When you receive your electronic invoices, you can automatically receive items. Caveat the minute the invoice posts, it changes to in processing. The items will not be on-site yet but in shipment to the library.
* How do you identify holds in ASN?
	+ Print out work slips when the items are received. Use work slips for lots of things – notations, etc.
	+ Cataloger has to look to see if there are holds.
* Work slips – We have printed work slips off receipt printers, which prevents wastefulness. Does anyone have a way to not waste so much paper with work skips?
	+ What kind of information is on the work ship? We put all our info on the records. Processing notes, genre stickers.
	+ Is there an option to have a smaller work slip?
* Couple of upgrades ago the purging of POs became available. How do I convince my staff it will be ok and work?
* 5.2 – more flexibility in POs.
	+ Can reassign funds, locations, change PO numbers but not a good idea if you use EDI. Changing PO numbers can create issues after PO has been release. Page 31 -33 in What’s New guide. EDI would be impacted if the PO number or control number are changed.
	+ Still cannot create items in the PO after releasing the PO.
* Ordering from Amazon. Is anyone doing more ordering and how are you managing invoices from them?
	+ When we get the packing list (if there is a slip), we create an order and invoice at the same time. Get MARC from OCLC or Z39.50.
	+ Order a lot from Amazon for out of print items. Create PO and POLI, Use the Amazon reporting tool to reconcile our P-Card. Amazon Business account – can download a spreadsheet to see timeline of orders, billing, etc.
	+ Only have one member library of our 24 is using Acquisitions. We found some acquisition was not balancing with the bookkeeper and we needed to find out why. If Amazon changed the price after charging the card, the selector was getting a credit but not telling the acquisition staff. The credit was not being reflected in the Acq. Module.
* Credits – Sometimes we send books back and get a credit for BNT but still have to pay for the processing. How do you reconcile this in Polaris?
* How are you doing your monographs (serials)?
	+ We use EDI through Brodart.
* Would like RFPs for vendors – does anyone have any they would like to share?
	+ Post to Polaris list-serv if possible.
* Multiple selectors. We have multiple selectors buying many items at certain time of the year and I would like to know how to pace them so catalogers are not overwhelmed.
	+ Use Polaris canned report - Fund Summary Report. Send to selectors each month. Assume a final ordering date and manually calculate where everyone should be. Send out harassing emails to staff about where they should be.
	+ One library asks staff to order 10% per month. First and last month of fiscal year are mixed in to 10 months of the year. This helps with new items going on the shelf and having a good balance of new items.
	+ Sno-Isle – use a naming convention and put that into the external field of the PO. This allows you to track by day and individual selector so you can give feedback to the selectors. SLC has 106 selectors. They use the TIPS list from Brodart. TS controls when the lists are available and takes them down after a certain amount of time.
* We do a lot of ordering through Baker and Taylor most of which is EDI. Some items still need to be ordered direct and we do not create POs until they are in the system. The money is not encumbered until that time. How do you use POs for things that are ordered direct and not through EDI?
	+ Set up a separate supplier record and import profile for BNT. Use this to bring in the order as you would for EDI but do not send the order via EDI. The profile should prevent you from using EDI. All you need to do is release the PO in order for the money to be encumbered.
	+ What about one-off vendors? How do you encumber this money? Staff has to enter a selection list on Polaris. Selection List can be copied over to a PO and released.
* Not a fan of fiscal year utility rollover. We run two years at same time – the current year and the next year. I do not want next year’s money tainting my number. I want to give a true and accurate accounting of how much money was spent.
	+ You can close a fiscal year without rolling money over.
	+ Talk to site manager about you best rollover options.