ACQSER Functional Contacts Meeting
Meeting No. 1
October 16, 2002
10:00 am – 12:00 pm
Kings College Library Conference Room

Attendees: Linda Aiken (DALLAW), Gail Fraser (DALWKK), Peter Glenister (MSVU), Paulette Lambert (KINGS), Elaine MacLean (SFX-NSOC rep), David Manning (SMU), Lloyd Melanson (AST), Verna Mingo (NSAC), Bev Neable (NSCC), Nick Sobol (UCCB-via telephone), Ella-Fay Zalezsak (DALKIL).

1. **Type of holding**

   Discussion of the difference betweeen the ISS and Bound Volumes types of holdings (TOH), as a result of the migration from Advance 6.7 to Advance 6.8. Decision that this was a cataloguing issue and it was passed over to P. Glenister as the CAT functional representative.

2. **Sequencing of Pieces**

   D. Manning reported on the continuing problem of having multi-volume set (i.e. pieces) listing out of sequence, when they are received/catalogued out of sequence. This issue is on the NSOC priority list.

3. **Documentation**

   Discussed posting written procedures to the Acquisitions/Serials Reference Web page on the Novanet website. These would be procedures libraries have developed for Acquisitions/Serials work in GEAC Advance for the use of their own staff. The sense was that these procedures might help other Novanet staff members and that they could be used in developing documentation and training materials for work in the Acquisitions/Serials modules of GEAC Advance.

   The suggestion was made that people send any written procedures to E. MacLean via email and that she will have the Novanet office post the documents post to the Acquistions/Serials webspace on the Novanet website.

   D. Manning volunteered to coordinate development of documentation/procedures for the Novanet ACQ/SER/CAT groups, in relation to Acquisitions & Serials work. This documentation could be used for training purposes.

4. **Standardization**

David Manning is interested in issues of standardization with regards to the shared Novanet database. The conclusion was that the development of dcoumentation/procedures would be a first step in standardization.

5. **Which libraries are using the Serials/Acquistions modules**

Library	Acquisitions	Serials
AST	Monographs/Standing Orders – no Serials	Checkin for annuals. Copysets, but no checkin for serials – open entries only.
DALKIL	Yes – ftp invoices	Yes, including barcoding bound serials
DALLAW	Monographs only	In process of implementing checkin, approx 33% done
DALWKK	Monographs only	Yes.
KINGS	Standing orders	75% done
MSVU	Yes	Yes
NSAC	Purchase orders for all materials, but no financial accounting	Yes
NSCAD	No	No
NSCC	No	Annuals only
SFX	Yes – ftp invoices	Yes, including checkout of single issues.
SMU	Yes	Yes, including barcoding bound serials
UCCB	Monographs only	Yes

6. **EDI (Electronic Document Interchange)**

L. Melanson raised a discussion around the possibility of implementing EDI for our purchase orders. This is seen to be an advantage for 8/12 libraries. The exceptions are DALWKK and DALLAW, who do not share a common vendor with other Novanet libraries, and NSCAD and NSCC, who are not yet using the Acquisitions module.

The advantages are, the use of EDI is good business practice; it will speed up the delivery of monographs; it will save the time of the vendors who are keying the purchase orders into their systems; it will save the time of libraries which are keying the purchase order into Novanet and rekeying it into the vendors online order systems. The following table shows the primary vendors used by each library.

Library	Coutts	Blackwells	Midwest	Logan Bros
AST		✔	✔	
DALKIL	✔	✔		
DALLAW	All orders sent direct			
DALWKK				✔
KINGS	✔		✔	
MSVU	✔	✔	✔	
NSAC	✔			
NSCAD	Not using the Acquistions module			
NSCC	✔			
SFX	✔	✔	✔	
SMU	✔		✔	
UCCB	✔			

E. MacLean was charged to take this to NSOC as a priority item. E. MacLean will suggest that since 8 libraries use Coutts as a monograph vendor, that we begin the implementation of EDI with Coutts.

7. **Training**

Discussion of the need for further training in serials, acquisitions and holdings work. Training is needed by:

- New libraries and/or new staff
- Libraries which are implementing new aspects of Advance
- Libraries where there is ambiquity regarding best practices

The concensus was that a small group could develop the training plan and that there could be a 3-day session in the spring of 2003. One day would be devoted to Acquisitions, another to Serials and one for Cataloguing/Holdings.

E. MacLean will take the training suggestion to NSOC.

NOTE: E. MacLean should inform NSOC that the telnet version of the OPAC is still the definitive resource for serials – GeoWeb is less reliable.