

# SWAN Acquisitions and Cataloging Networking Group

May 8, 2025

### Welcome and Introductions

Name, home organization, and how long you have been there

# What is your favorite procedure or workflow update you adopted this past year?

# Experiences with new vendors?

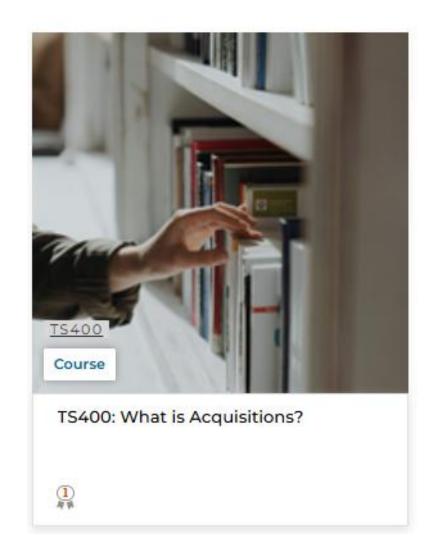
#### **EDI Ordering**

Batch loading records
without Funds tracking –
Loading Bibs and Items
without Orders

May 9, 2025 SWAN Library Services

# TS400 - "What is Acquisitions"

Check out our first Acquisitions course, geared toward libraries interested in Acquisitions but not yet using it!



May 9, 2025 SWAN Library Services

# Acquisitions at the Tinley Park Public Library

Joy Anhalt

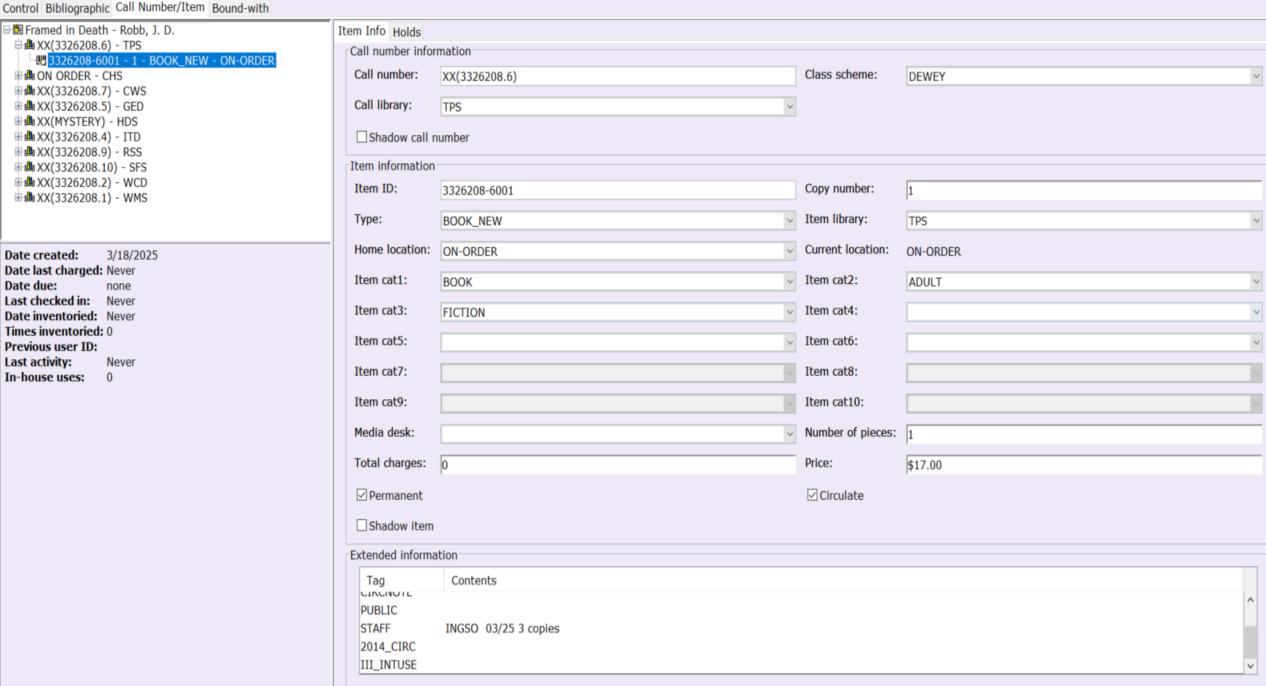
Technical Services Manager

### **Acquisition process**

- Pre-cats
- Reports

Framed in Death / Robb, J. D.

#### Control Bibliographic Call Number/Item Bound-with



#### Extended information

Tag

Contents

CALLNUMBER

CIRCNOTE

PUBLIC

STAFF

INGSO 05/24 5 copies + Rental 08/24 7 copies

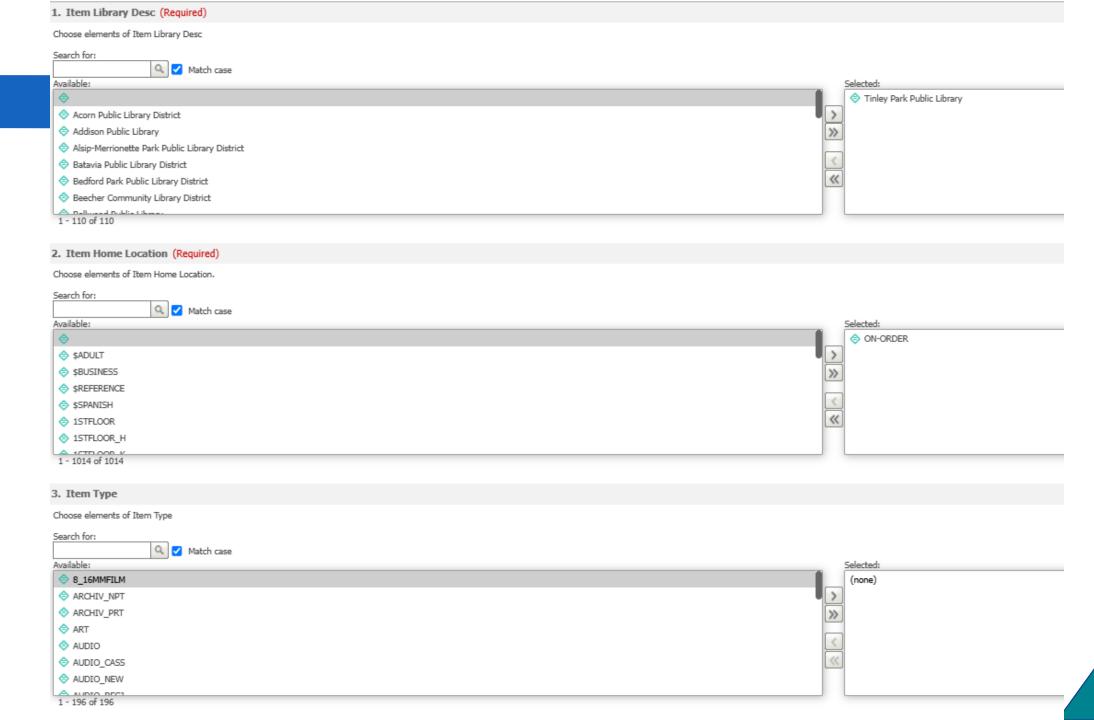
DOLL CIDC

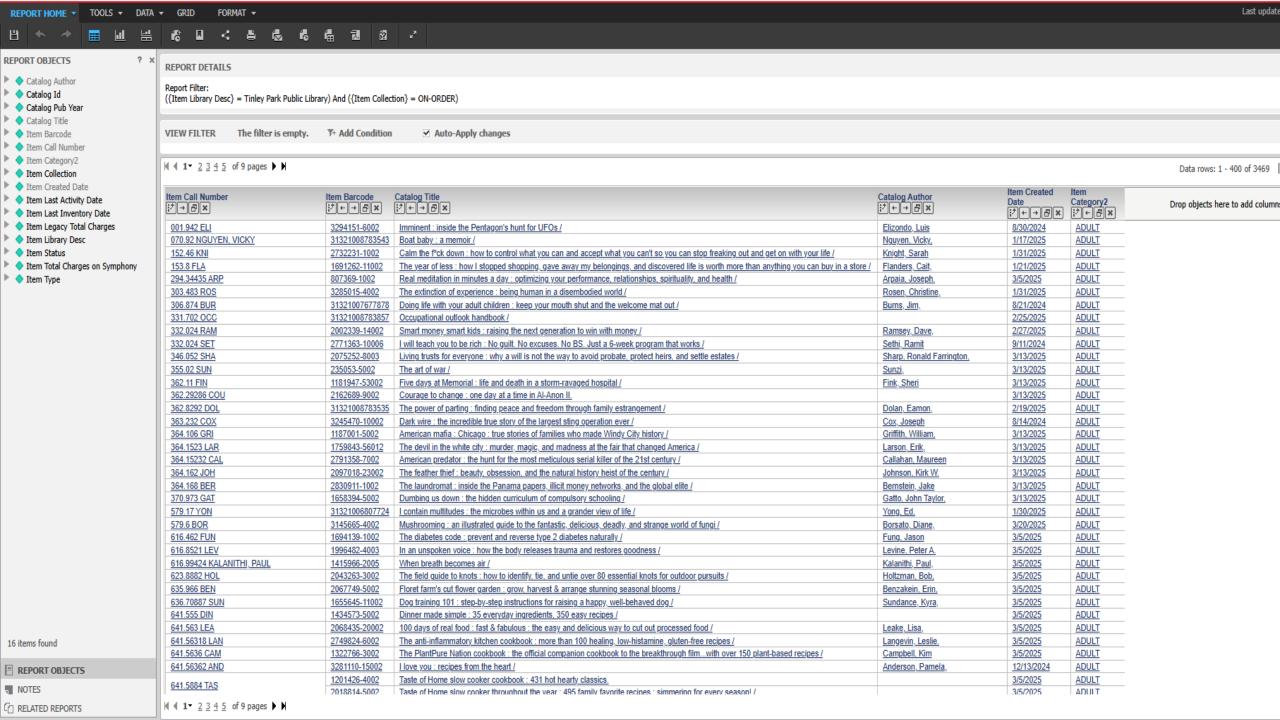
Search for:	tps template			~	Search
ndex:	Title			√ [T	ype:
ibrary:	ALL			~ (	Keyword
	,			_ (	OBrowse
Current:	Sands, Lynsay Immortal by Morning: An Argeneau Novel XX(3	3342150.2) ID:3342150-2001 Ctrl#:a3342150 Copy:1		(	○ Exact
KEYWORD 1	Title tps template, ALL: 14 records				
	receptoring real 14 records	A. 4b	F	D. I	. V
Title		Author	Format		b. Year
	ATE TPS MCC Activity kit: title		KIT	202	25 ^
	ATE PLAYAWAY	Author.	PLAYAWAY		
	ATE BOOK FICTION	Author			
	ATE BOOK NONFICTION	Author			
	ATE AUDIOBOOK	Author	AUDIOBOOK CD		
TPS TEMPLA			DVD		
	ATE CONSOLE GAME		VIDEO GAME		
	ATE BLU-RAY		BLU-RAY		
	ATE LARGE PRINT	Author	LARGE PRINT		
	ATE MUSIC CD	Artist	CD		V
TPS TEMPLA	ATE DVD COMBO PACK		COMBO PACK		
Description	Call Number/Item				
eader	om na				
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Γitle	TPS TEMPLATE TPS MCC Activity kit: title				
/ariant title					
/ariant title	TPS MCC kit title				
/ariant title	MCC Activity kit title				
/ariant title	Tinley Park Memory Care Collection activity kit title				
264	Tinley Park, IL: Tinley Park Public Library, 2025				
Physical de	scription 1 kit (various items) ; in container or tote bag				
588	Title supplied by cataloger.				
General No	te Restricted to Tinley Park Public Library cardholders only				
Contents	Contents note				
Summary	Memory Care Collection Activity Kits offer a fun way for fa	amily, friends, and caregivers to engage with loved ones experiencing cognitive cl	hanges or memory loss caused by Alzheimer's or other forms of dementia. Eac	n ther	med kit con
ocal note	KIT				
Subject ter					
Subject ter					
Subject ter					
ocal subje					
reated by	TDS/MARC/1A/				

The two of us / Foster, Lori. Odd couple. Control Bibliographic Call Number/Item Bound-with ⊞ The two of us - Foster, Lori. Odd couple. Item Info Holds □ I FICTION FOSTER, LORI - TPS Call number information ₩ 31321008783006 - 1 - BOOK\_NEW - CHECKEDOUT - Ca **⊞** ROMANCE TWO - ADD Call number: Class scheme: FICTION FOSTER, LORI DEWEY **⊞** ■ FICTION FOSTER - CHS Call library: TPS ☐ Shadow call number Item information Copy number: Item ID: 31321008783006 1 Item library: Type: BOOK\_NEW TPS < Current location: Home location: NEW\_1STFLR CHECKEDOUT Date created: 1/8/2025 Date last charged: 3/31/2025 Item cat1: Item cat2: BOOK ADULT 4/21/2025,23:59 Date due: Last checked in: Never Item cat4: Item cat3: FICTION Date inventoried: Never Times inventoried: 0 Item cat6: Item cat5: Previous user ID: Last activity: 3/31/2025 Item cat8: Item cat7: In-house uses: Item cat9: Item cat10: Media desk: Number of pieces: Total charges: Price: \$11.00 ✓ Permanent Circulate ☐ Shadow item Extended information Tag Contents PUDLIC STAFF ING 01/25 2014\_CIRC III\_INTUSE CAT BY 2025 MAR 29 ADULT JR

### Reports

• On order items BCA report





Report Filter:

({Item Library Desc} = Tinley Park Public Library) And ({Item Collection} = ON-ORDER)

View Filter:

 $\{Item Created Date\} = 7/13/2021, 12/21/2021, 3/6/2023, 4/18/2023, 4/18/2023, 4/20/2023, 5/11/2023, 7/17/2023, 7/17/2023, 7/17/2023, 9/12/2023, 9/12/2023, 10/12/2023, 10/12/2023, 10/12/2023, 11/12/$ 

VIEW FILTER

▼+ Add Condition × Clear All

Auto-Apply changes

(x) Item Created Date In List (7/13/2021, 12/21/2021, 3/6/2023, 4/18/2023, 4/18/2023, 4/18/2023, 5/11/2023, 7/17/2023, 7/17/2023, 8/10/2023, 9/7/2023, 9/8/2023, 9/12/2023, 10/12/2023, 10/12/2023, 11/1/2023, 11

Data rows: 29

	Item Barcode	Catalog Title		Item Created Dat		Drop objects here to add columns
	[?++∃×	<u>;</u> ?← <b>→</b> ₽×	[7+→ <b>∃</b> ×	[?]← →  <b>a</b>  ×	:7 ← <b>(3</b> × )	Drop objects here to add columns
AUDIOBOOK FICTION SERLE, REBECCA	31321007791232	In five years : a novel /	Serle, Rebecca	9/7/2023	<u>ADULT</u>	
E BOARD COX	2896899-1002	Mouse's Thanksgiving /	Cox, Judy,	12/15/2023	JUVENILE	
XX(1547966.19)	<u>1547966-19001</u>	Garage Gym Bible: The Expert Guide to Creating the Ideal Home Gym	Smith, William (EDT)	10/31/2023	ADULT	
XX(2795376.15)	<u>2795376-15001</u>	Exercises for incontinence: an easy and effective program for men and women to help improve urinary and bowel incontinence	Smith, William	10/31/2023	<u>ADULT</u>	
XX(2982227.24)	2982227-24001	Clive Cussler's the serpent's eye /	Burcell, Robin,	<u>7/13/2021</u>	<u>ADULT</u>	
XX(2984517.14)	2984517-14001	The Smart Girl's Guide to Privacy.	Blue, Violet,	7/19/2023	<u>ADULT</u>	
XX(3002667.2)	3002667-2001	The Bride Bet : Girl Meets Duke	Dare, Tessa	<u>7/13/2021</u>	<u>ADULT</u>	
XX(3040233.8)	3040233-8001	Tiny Tattoos: 1,000 Designs Temporary Tattoos Permanent Tattoos Henna Tattoo Meanings Symbolism	Weldon Owen (COR)	9/8/2023	ADULT	
XX(3094139.6)	3094139-6001	Clive Cussler's the serpent's eye /	Burcell, Robin,	12/21/2021	ADULT	
XX(3098536.4)	3098536-4001	The Army Fitness Bible : The Complete Military Training Guide	<u>Turner, Michelle</u>	10/31/2023	ADULT	
XX(3103056.2)	3103056-2001	Collins Italian Dictionary	Harpercollins Publishers Ltd. (COR)	3/14/2023	<u>ADULT</u>	
XX(3115153.47)	<u>3115153-47001</u>	The sister switch /	Mlynowski, Sarah	10/31/2023	JUVENILE	
XX(3122442.6)	3122442-6001	DK Eyewitness Family Guide France	Dk Eyewitness	10/31/2023	ADULT	
XX(3123495.2)	3123495-2001	The Lord of the Rings: Gollum	Maximum Games LLC	5/11/2023	TEEN	
XX(3151825.1)	3151825-1001	Goes like this	Crane, Jordan	3/6/2023	<u>ADULT</u>	Drop Metrics here to add data
XX(3162667.4)	3162667-4001	The Mama Natural week-by-week guide to pregnancy & childbirth /	Howland, Genevieve,	11/7/2023	ADULT	
XX(3163022.1)	3163022-1001	Middle East phrasebook & dictionary /		4/18/2023	ADULT	
XX(3163662.1)	3163662-1001	Today's menu for the Emiya family. Volume 6	<u>TAa</u>	4/20/2023	TEEN	
XX(3182998.6)	3182998-6001	Good bad girl /	Feeney, Alice,	8/10/2023	ADULT	
XX(3184458.1)	3184458-1001	Big book of Spanish words	Clever Publishing	7/17/2023	JUVENILE	
XX(3198423.1)	3198423-1001	A jazzman's blues	Perry, Tyler	9/12/2023	<u>ADULT</u>	
XX(3202765.2)	3202765-2001	A Witch's Guide to Magical Innkeeping	Mandanna, Sangu	11/14/2023	<u>ADULT</u>	
XX(3202786.6)	3202786-6001	Killers of the Flower Moon (Blu-ray)		11/1/2023	<u>ADULT</u>	
XX(3203857.5)	3203857-5001	Camp Hideout		9/22/2023	JUVENILE	
XX(3205790.1)	3205790-1001	<u>Dreamin' wild</u>		10/12/2023	<u>ADULT</u>	
XX(3207636.5)	3207636-5001	Killers of the Flower Moon (DVD)		11/1/2023	ADULT	
XX(3207636.6)	3207636-6001	Killers of the Flower Moon (DVD)		11/1/2023	ADULT	
XX(3227005.1)	3227005-1001	Compassionate leadership: how to create and maintain engaged, commetted and high-performing teams	Hopkinson, Manley	11/22/2023	<u>ADULT</u>	
XX(3227826.2)	3227826-2001	The King's Ransom	Evanovich, Janet	12/15/2023	ADULT	

#### On-orders 2023 and prior (01/09/2025)

Item Call Number	Item Barcode	Catalog Title	Catalog Author	Item Created	Item Category2
			_	Date	
XX(3198423.1)	3198423-1001	A jazzman's blues	Perry, Tyler	9/12/2023	ADULT
XX(3202765.2)	3202765-2001	A Witch's Guide to Magical Innkeeping	Mandanna, Sangu	11/14/2023	ADULT
XX(2982227.24)	2982227-24001	Clive Cussler's the serpent's eye /	Burcell, Robin,	7/13/2021	ADULT
XX(3094139.6)	3094139-6001	Clive Cussler's the serpent's eye /	Burcell, Robin,	12/21/2021	ADULT
XX(3103056.2)	3103056-2001	Collins Italian Dictionary	Harpercollins Publishers Ltd. (COR)	3/14/2023	ADULT
XX(3227005.1)	3227005-1001	Compassionate leadership: how to create and maintain engaged, commetted and high-performing teams	Hopkinson, Manley	11/22/2023	ADULT
XX(3122442.6)	3122442-6001	DK Eyewitness Family Guide France	Dk Eyewitness	10/31/2023	ADULT
XX(3205790.1)	3205790-1001	Dreamin' wild		10/12/2023	ADULT
XX(2795376.15)	2795376-15001	Exercises for incontinence: an easy and effective program for men and women to help improve urinary and bowel incontinence	Smith, William	10/31/2023	ADULT
XX(1547966.19)	1547966-19001	Garage Gym Bible : The Expert Guide to Creating the Ideal Home Gym	Smith, William (EDT)	10/31/2023	ADULT
XX(3151825.1)	3151825-1001	Goes like this	Crane, Jordan	3/6/2023	ADULT

#### per Ingram release date is March 5, 2024 -20230821/TPS/JA; per Ingram release date is March 19, 2026 -20250403/TPS/JA

500	per B&T pub date is 2/27/2024 -20231101/TPS/JA
500	per Ingram pub date is 01/07/2025 - DGS/KR/20241119
500	Item shows Not Available - Publisher Postponed in Ingram - DGS/KR/20241230
591	7/12/2024 B&T pub date is 9/24/2024

500

2023-2024	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total	Average
Pre-cats TBS	0	2	0	1	0	4	1	0	16	1	3	2	30	2.5
Pre-cats TPS	220	169	223	172	180	194	234	212	173	184	178	145	2,284	190.33
SWAN edited	3	2	2	9	2	2	33	1	2	8	0	4	68	5.67
SWAN original	0	0	0	3	0	0	0	0	1	1	1	0	6	0.5
SWAN total	223	173	225	185	182	200	268	213	192	194	182	151	2,388	199

2024-2025	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	Total	Average
Pre-cats TBS	2	0	0	0	0	9	5	2	5	3	0		26	2.36
Pre-cats TPS	194	271	151	287	232	263	150	219	277	227	270		2,541	231.00
SWAN edited	7	8	31	16	4	0	0	15	12	8	0		101	9.18
SWAN original	2	29	2	3	2	0	0	0	18	0	0		56	5.09
SWAN total	205	308	184	306	238	272	155	236	312	238	270	0	2,724	227.00

ded					Bookmobile	Bookmobile	Bookmobile	Bookmobile				
Adult	Adult	YS	YS		Adult	Adult	Rentals	Rental	YS	YS		
Print	Non-Print	print	Non-Print	TMG	Print	Non-Print	books	DVDs	Print	Non-Print	Total	Average
9549	3881	5371	747	n/a	277	128	n/a	n/a	204	64	20221	1685.08
8546	2496	6214	935	n/a	312	75	n/a	n/a	356	29	18963	1580.25
8084	2284	5782	829	n/a	164	139	n/a	n/a	454	57	17793	1482.75
	<b>Adult Print</b> 9549 8546	Adult         Adult           Print         Non-Print           9549         3881           8546         2496	Adult         YS           Print         Non-Print         print           9549         3881         5371           8546         2496         6214	Adult         Adult         YS         YS           Print         Non-Print         print         Non-Print           9549         3881         5371         747           8546         2496         6214         935	Adult         Adult         YS         YS           Print         Non-Print         print         Non-Print         TMG           9549         3881         5371         747         n/a           8546         2496         6214         935         n/a	Adult         Adult         YS         YS         Adult           Print         Non-Print         print         Non-Print         TMG         Print           9549         3881         5371         747         n/a         277           8546         2496         6214         935         n/a         312	Adult         Adult         YS         YS         Adult         Adult           Print         Non-Print         Print         Non-Print           9549         3881         5371         747         n/a         277         128           8546         2496         6214         935         n/a         312         75	Adult         Adult         YS         Adult         Adult         Adult         Rentals           Print         Non-Print         print         Non-Print         Non-Print         books           9549         3881         5371         747         n/a         277         128         n/a           8546         2496         6214         935         n/a         312         75         n/a	Adult         Adult         YS         YS         Adult         Adult         Rentals         Rental           Print         Non-Print         print         Non-Print         books         DVDs           9549         3881         5371         747         n/a         277         128         n/a         n/a           8546         2496         6214         935         n/a         312         75         n/a         n/a	Adult         Adult         YS         Adult         Adult         Rentals         Rental         YS           Print         Non-Print         print         Non-Print         Non-Print         books         DVDs         Print           9549         3881         5371         747         n/a         277         128         n/a         n/a         204           8546         2496         6214         935         n/a         312         75         n/a         n/a         356	Adult         Adult         YS         YS           Print         Non-Print         print         Non-Print         Print         Non-Print         DVDs         Print         Non-Print           9549         3881         5371         747         n/a         277         128         n/a         n/a         204         64           8546         2496         6214         935         n/a         312         75         n/a         n/a         356         29	Adult         Adult         YS         YS         Adult         Adult         Rentals         Rental         YS         YS           Print         Non-Print         print         Non-Print         print         Non-Print         books         DVDs         print         Non-Print         Total           9549         3881         5371         747         n/a         277         128         n/a         n/a         204         64         20221           8546         2496         6214         935         n/a         312         75         n/a         n/a         356         29         18963

## Joy Anhalt Technical Services Manager Tinley Park Public Library

janhalt@tplibrary.org

708-845-5713



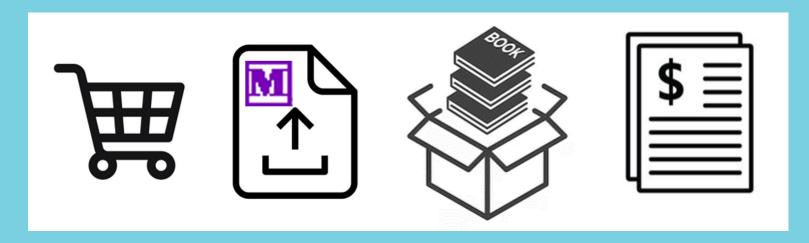
Julie Tegtmeier

Cataloging & Data Librarian St. Charles Public Library



### Why Use the Acquisitions Module?

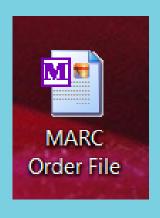
- EDI Ordering
  - A simple way to place and track orders, create on-order items, add new items to the collection, and pay invoices.



• The Acquisitions Module will work for non-EDI orders too.



- Download the MARC Order File from Vendor
- 2. Load Order File in using MARC Order Import Wizard
- 3. Run biborderload Report



Orders
角 Display Order
🗂 Add Basic Order
🛱 Add Dated Order
🖲 Add Recurring Order
🗗 Duplicate Order
AMARC Order Import
2

_	- · · · · · · · · · · · · · · · · · · ·	
ACQ SCD	Alliance Load Bibs with Order Info	biborderload
ACQ SCD	Amazon Load Bibs with Order Info	biborderload
ACQ SCD	Load B&T AV with Order Info	biborderload
ACQ SCD	Load B&T with Order Info New	biborderload
ACQ SCD	Load B&T YOUTH with Order Info	biborderload
ACQ SCD	Load BTLEASEBOOK with Order Info	biborderload
ACQ SCD	Load Findaway with Order Info	biborderload
ACQ SCD	Load Ingram with Order Info	biborderload
ACQ SCD	Load MWT with Order Info	biborderload
3		

The Last Second Chance / Score, Lucy Control Bibliographic MARC Holdings Call Number/Item Bound-with Orders Serials Ctrl Selections ■The Last Second Chance - Score, Lucy Item Info Circ Info Bills Checkouts Holds Bookings → XX(3315059.1) - SCD Call number information ■3315059-1001 - 1 - BOOK NEW - ON-ORDER Call number: Class scheme: XX(3315059.1) ■TECHNICAL SERVICES - BVD AUTO 3315059-3001 - 1 - BOOK - ON-ORDER Call library: ₽ ZZZ - DGS SCD ■ 3315059-7001 - 1 - BOOK\_NEW - AVAIL\_SOON ♣ FICTION SCOR - NLS Shadow call number N ■ 3315059-5001 - 1 - BOOK NEW - ON-ORDER Item information ♠ XX(3315059.4) - OPS 3315059-4001 - 1 - BOOK - ON-ORDER Item ID: Copy number: 3315059-1001 ➡ XX(3315059.6) - ROD ■ 3315059-6001 - 1 - BCACQTEMP - ON-ORDER Item library: Type: **BOOK NEW** SCD △ XX(3315059.2) - VPD ■ 3315059-2001 - 1 - BOOK NEW - ON-ORDER Home location: Current location: ON-ORDER

**Date created:** 11/22/2024

Date last charged: Never
Date due: none
Last checked in: Never
Date inventoried: Never
Times inventoried: 0
Previous user ID:

**Last activity:** 11/22/2024

In-house uses: 0

ON-ORDER Item cat1: Item cat2: BOOK ADULT Item cat3: Item cat4: LG ROMANCE **FICTION** Item cat5: Item cat6: Item cat7: Item cat8: Item cat10: Item cat9:

Return to Search Display Holdings Close



#### 4. Load Flat Order Records

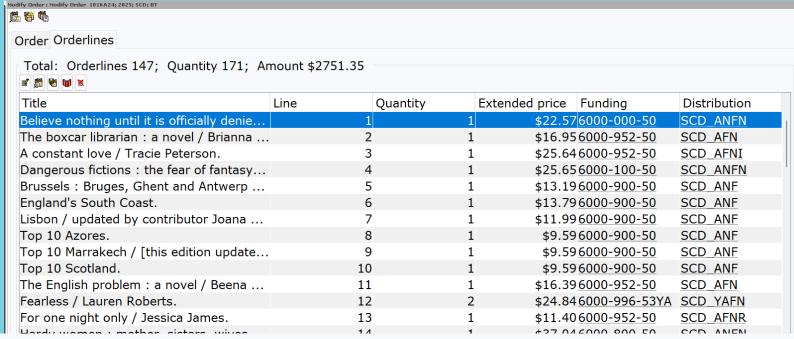
Templates Acquisition load								
Report name »	Source							
Load Bibs for Selection	selectbib							
Load Bibs with Order Info	biborderload							
Load Bibs with Selectn & Dscn	selectbibemb							
Load Flat Order Records	orderload							
Load Flat Selection Records	selectionload							



W64 55											
The Last Second	Chance / Score, Lu	су									
Control Bibliograp	hic MARC Holdings	Call Number/Item	Bound-with Orders	Serials Ctrl Selecti	ions						
Number of record		· ·					~				
Order ID	Order line	Fiscal cycle	Library	Parts in set	Quantity	Quantity received	Coverage note				
1122A24	18	2025	SCD		2	0					
Display											
Library:	SCD	~									
Oudous trops											
Last activity:	11/22/2024										
In-house uses:	0		Item cat9	9:	Iter	n cat10:					
		Return to Search Display Holdings Close									



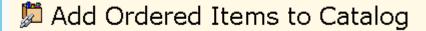
5. Modify Date Ready in the Order

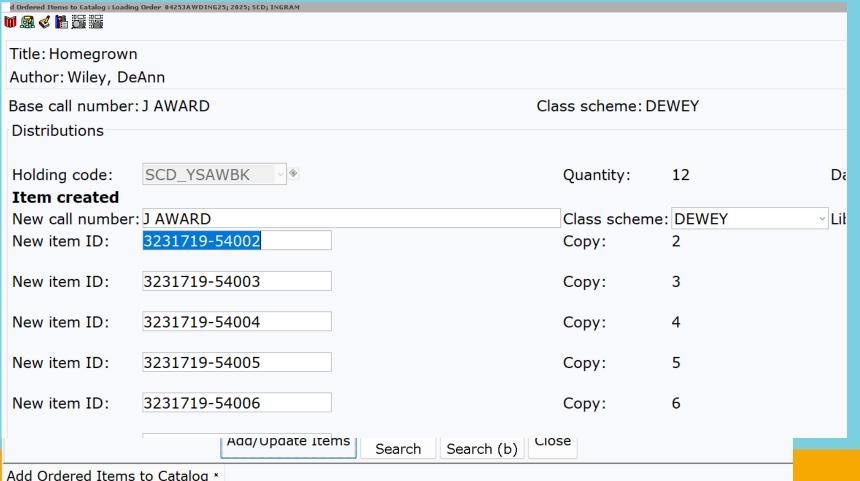


Order Orderlines				
Order Basic Info				
Date created:	3/28/2025	Date modified:	4/4/2025	
Date ready:	~	Date mailed:	NEVER	●
Date to claim:	NEVER	Date to cancel:	NEVER	₩
	TODAY			

### **EDI Ordering – Receiving Items**

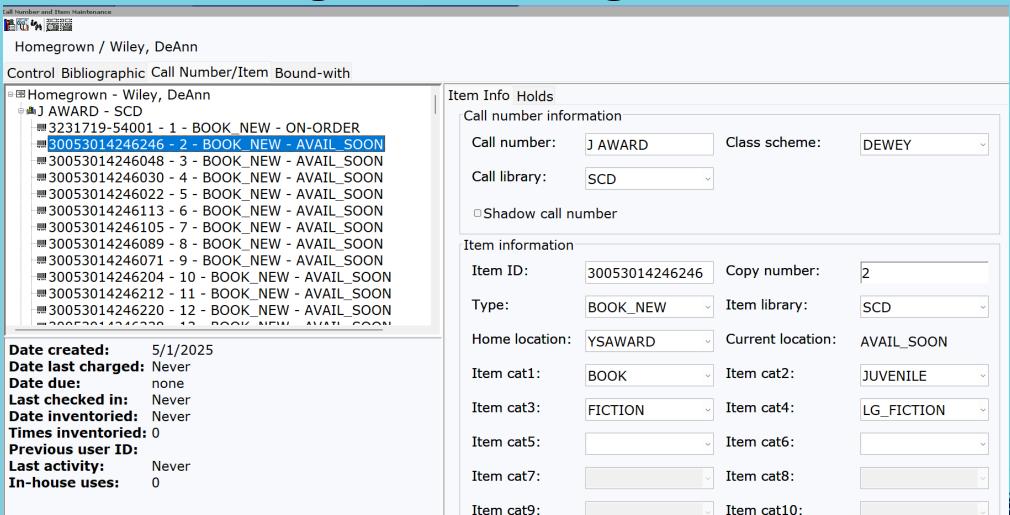
Add Ordered Items to Catalog Wizard



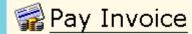


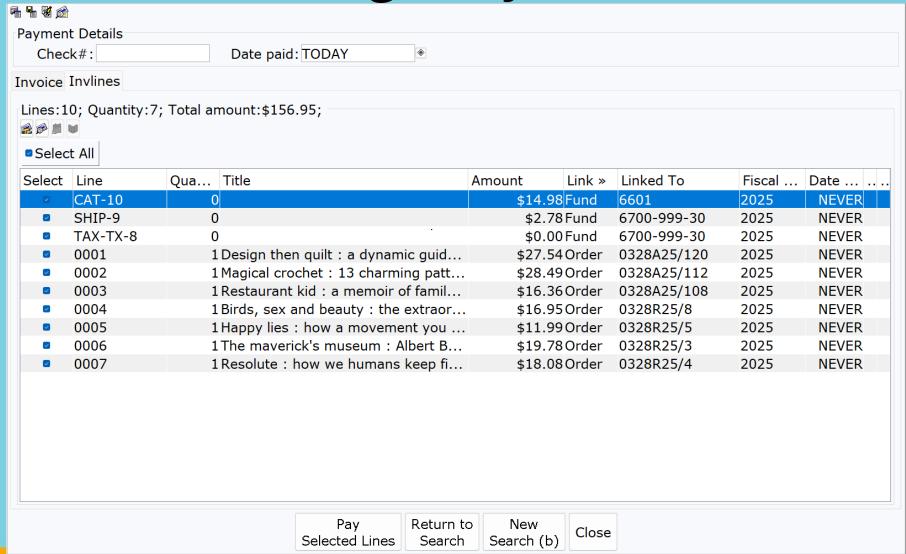


### **EDI Ordering – Receiving Items**



### EDI Ordering -Pay Invoice Wizard Pay Invoice

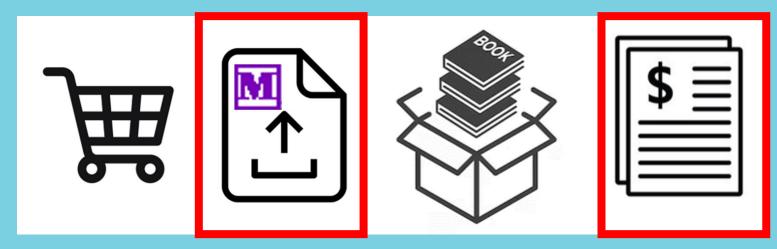






### **Non-EDI Ordering**

 Our process for non-EDI ordering is similar to EDI ordering but with a few key differences



We use MarcEdit to create an order file similar to the vendor file.

We use the Add Invoice wizard to create invoices for these orders.



### Pros/Cons - Order Tracking

#### Pros:

- Order Tracking
- Fund Management
- BCA Reports
- Staff Time

#### Cons:

Setup Time



### **Inventories**

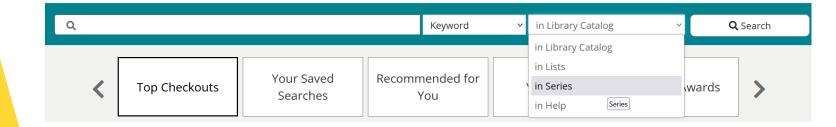
"How do you do it?" - The library perspective

### Inventories

"How can we help?" - The SWAN perspective

# Series pages in Aspen

## Search series in Aspen through the dropdown pictured below



#### Sample series searches:

- Hunger Games
- Baby-sitters club

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# Series pages in Aspen Continued

- Fixes in Aspen update next week
  - Duplicate copies of entries
  - o Entries that are not hyperlinked at all
- Things to submit a ticket for
  - o **Duplicate series**
  - oltems on the wrong series
  - o E-materials that can be manually grouped with other

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### Update from Cataloging Working Group

### **Open Discussion**

- Process & maintenance for board games (INS Jeanine)
- Digital accessibility standards (WMS Laura)
- Other topics?

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Co-Chairs:

Susana Leyva (Downers Grove Public Library)

MaryKellie Marquez (Warrenville Public Library District)

# Thank you for attending and thank you to Susana Leyva and Downers Grove Public Library for hosting!

Next meeting:

September 11, 2025 – 9:30AM-11:00AM (virtual)

Register on L2

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