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## Biz of Acq -- Credit Card 101: Policies and Practices

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university or college, however. Under the work-for-hire doctrine, the institution is the author and holds all rights to the work. Thus if a staff member creates a work as a part of his or her job, the institution owns the copyright. Works not created on work time are not owned by the school. Institutions may permit staff ownership of even works-for-hire with a written agreement to that effect. Student works are exactly the opposite; students own the copyrights in the works they create even as assignments in their classes.

Works generated by groups such as student groups, faculty groups and alumni organizations are most likely owned by the group. An academic institution might be able to claim copyright ownership of certain student-group works that are generated at the request of the institution. For example, if the college or university asks the student government association to draft a code of conduct, the college or university might have some claims on the work. The same is true of faculty governance group works but politically, it is unlikely the school would claim ownership of these reports, etc.

Alumni groups are sometimes only loosely governed by the institution; others are totally separate entities. In this situation, the school has no claim of ownership on works generated by alumni associations.

**QUESTION:** *May an academic library place on reserve a copy of a journal that belongs to a faculty member? If so, may it remain on reserve for multiple semesters?*

**ANSWER:** Yes. If the copy is an original volume or issue owned by the faculty member, it may be placed on reserve, and there is no restriction on how many semesters the work may remain on reserve because there is no reproduction. If the faculty-owned copy is a photocopy of an article or book chapter, it still may be placed on reserve. Now, however, the copy is a reproduction and should be on reserve only for one term without permission.

**QUESTION:** *A faculty member at the college wants to compile a number of journal articles on a particular topic and put them on a CD to distribute to other faculty members. Is this permissible?*

**ANSWER:** No, unless the faculty member has permission from copyright owners or the articles are from journals to which the institution holds a license and the license permits reproduction and distribution in electronic form to others in the school.



## Biz of Acq — Credit Card 101: Policies and Practices

by **Joe Badics** (Acquisitions Librarian, Bruce T. Halle Library, Eastern Michigan University, Ypsilanti, MI, 48197-2207; Phone: 734-787-0020, x2053; Fax: 734-487-5399)

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**Column Editor's Note:** *Many libraries are using credit cards to purchase all types of materials. Joe Badics' article describes the benefits of using a credit card for library acquisitions and some of the challenges involved. At Joe's suggestion, I'd like to invite readers to send me their favorite credit card experiences, both good and bad (send to <flinchba@umbc.edu>) which I'll compile into an article for future publication in Biz of Acq. — MF*

The majority of our expenditures are handled in the traditional library manner by our subscription agent, approval book vendor, and standing order dealers. When the offer of getting a credit card for university purchases first came up a decade ago, I thought that it might be occasionally useful. What was at first a convenience has become a necessity. I can't imagine trying to work without one now.

What has changed is continuous growth of the Internet. Virtually everyone has a Website with their wares to sell, and while a select group of major publishers and vendors will still accept the classic library purchase order, many smaller publishers want their money immediately and will gladly accept your Visa, MasterCard, or American Express.

### Reasons for Using a Credit Card

It is expensive for your institution to write checks and it may be difficult to issue payment within the net 30 days that many sources request. In order for our university to issue a check to a publisher or vendor, they must have their W-9 tax identification form on file and be officially registered as a vendor. This all takes time.

If you do not expect to order from a particular publisher on a regular basis, a credit card will save your institution time, money, and paperwork. For instance at **Eastern Michigan University** we are building a collection of books that have been written by our alumni. Some of these are self-published or from extremely small presses. The credit card has been essential in obtaining this material.

The credit card is essential for rush orders. If we need items for reserve we can either pick them up immediately from the local bookstore or we can place an instant Internet order using **Barnes and Noble** or **Amazon.com**.

The **Acquisitions and Interlibrary Loan Department** are combined in our library. The credit card has been crucial here. The book and media requests by our patrons are reviewed

daily and many are immediately ordered for our collection rather than borrowed. We also have purchased articles directly from publishers which are then immediately accessible. In addition to being faster, it may be actually cheaper than paying the borrowing charges from some lending institutions plus the copyright fees later.

The used and out-of-print book market has been opened up by the Internet. No longer do you need a store to sell your wares. In most cases you are dealing through an intermediary Website, such as **Amazon.com**, **Alibris.com**, or **Abebooks.com**, to locate this material. The individual dealers generally want their money at the time of sale, which the credit card allows.

In addition to the formats already mentioned, we have used the credit card to purchase sheet music and scores; entire journal issues; atlases and maps; and all sorts of media: videos, DVDs, and music CDs. We recently purchased a year's access to "Doody's Core Titles," the online replacement to the classic **Brandon-Hill** service. One of my colleagues uses his university credit card to purchase major office supplies, including software, printers, and hardware. The **Kresge Business Administration Library** at the **University of Michigan** has purchased expensive databases using their institutional credit card.

### Procedures

All material requests outside our routine approval plan orders are reviewed for various source and payment possibilities. Increasingly the credit card has become the preferred payment choice.

Every item purchased using the credit card that is to be added to our collection is treated similar to a regular order handled by a vendor. After a record is added to our catalog, a purchase order is created and the cost is deducted from the appropriate subject fund. This allows us to be able to produce accurate reports for each item that was purchased from every fund. The vendor is listed as the credit card company.

We keep copies of the monthly statements and invoices for seven years. Our Purchasing Department does periodic review of all credit cards, and we must provide documentation for every purchase on any given month. I have been "audited" and had to provide documentation for every transaction during a two-month period. Random orders from random months are sometimes requested too.

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## Problems to Watch Out For

As with your personal credit cards, it is important to reconcile the monthly statements against purchases received that month. Some sites, including **Barnes and Noble** and **Amazon.com**, charge your credit card only when the item is about to be shipped from their warehouses. Other sites assess the cost to your credit card immediately upon receipt of your order. This means that the charge will appear before you receive your material if there is any delay in shipping.

The monthly statement is a great reminder to verify the receipt of your orders. On several occasions we've had independent book dealers that no longer own the particular title consider the money that they've received as a back order. If they don't have it in stock, the book dealers are supposed to issue a refund. Some major Websites, such as **Amazon.com**, will intercede between the buyer and dealer in disputes over merchandise listed on their Websites but under limited time restrictions.

You may have problems with your credit limit. For instance my university has placed a cap of \$500 for a single transaction. On big orders I've had to split up my purchases over several transactions and even once have the dealer split my order for a set that costs more than \$500 over several transactions. It is possible to exceed your monthly credit limit when expenditures from one month are encumbered on the next. **The Kresge Business Administration Library** at the **University of Michigan** has negotiated a large monthly spending limit to cover their periodic database expenditures.

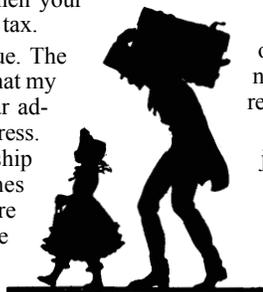
Another issue that occasionally occurs

is over state sales tax. Some Websites will automatically charge sales tax for orders to certain states. If your institution is sales tax exempt, you may need to provide the necessary paperwork to remove this charge. For instance, **Barnes and Noble** will require the sales tax exemption paperwork once, and then your future orders will exempt the sales tax.

The bill-to address can be an issue. The Purchasing Department decided what my account address is. This particular address does not include a street address. Some credit card sites will only ship to the address that exactly matches the bill-to address, but others require a street address. Fortunately some sites will allow you to list separate bill-to and ship-to addresses.

A final warning involves those official-looking notices that come in requesting account verification. It looks as if your **Amazon.com** account has problems, and you are being asked again for your credit card number and other personal information. Those spam requests are dangerous attempts at identity theft. **Amazon.com** is one of the Websites that wants to be notified whenever these illegal requests occur.

Despite the occasional hassle just mentioned, the credit card has become an integral tool in acquiring information for our patrons. If you don't have one, ask your administration for one. 🍷



## From the University Presses — Anachronisms or Innovators?

### Reflections on University Presses As Portrayed in the Ithaka Report

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The much anticipated *Ithaka Report* titled "University Publishing in a Digital Age," pre-released for comment to a select group on June 5 and then published to the world on July 26, has come as a wakeup call to the university press community. While long feeling marginalized from discussions about the future of scholarly

communication (as in reports last year from the **ACLS** on cyberinfrastructure, reviewed in my previous column, and from the **Berkman Center** on changes needed in the copyright system), many in our community nevertheless were shocked to learn from the *Ithaka*

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