Questions & Answers
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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 require. It is cheaper 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 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,” 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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