'Tis a Far Far Better Thing...Maybe

Electronic Selection in a Multi-Vendor Environment
Charleston Conference 2008

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Memorial University Libraries
Memorial University Libraries

- Total collection of 1.7 million titles
- Annual monograph expenditure of 1.5 million
- Buy ~20,000 new monographs annually
- Blackwell, YBP, Coutts, Harrassowitz, Casalini, Touzot
- No major approval plans

Before 2006, there was paper.
Paper Workflow: Selection

- Paper slips from multiple vendors (176,985 in 2007)
- Slips sorted manually, duplicate titles from vendors grouped
- Slips routed to faculty through campus mail for input.
- Selectors write fund numbers on paper slips, and send to acquisitions staff.
Paper Workflow: Acquisitions

- Manual catalogue search for duplicates
- Manual OCLC search for cataloguing copy
- Orders and orderlines are manually created in Unicorn
- Orders are placed manually through vendor site.
Paper Workflow: Invoices

- Item in hand checked against cataloguing copy.
- Invoice manually created in Unicorn based on paper invoice.
- Paper invoices are sent to administration office for manual entry into Banner.
Paper Workflow: Inefficiencies

- Manual sorting of ~15,000 slips each month.
- Born-digital data shuffled around through snail mail.
- Data re-keyed about nine times during paper workflow.
EDI Steering Committee

- Composed of individuals from Systems, Collections, Acquisitions, Cataloguing, and Administration
- Began pilot project in May 2006
Basic 9xx/EDI Workflow

Vendor electronic selection interface

Orders uploaded from ILS to vendor (X12)

Bibs and Orders imported to ILS (9xx)

Invoices downloaded from vendor to ILS (X12)

Invoices fed from ILS to Banner (data cross-walk)
9xx/EDI Implementation

- ILS profiles must be set up for each vendor & currency
- Training in three interfaces:
  - Gobi (YBP)
  - Collection Manager (Blackwell)
  - Oasis (Coutts)
Implementation: Unicorn Reports

- MARC Order Import Utility Wizard
- Load Bibs with Order Info (biborderload) *
- Load Flat Order Records (orderload) *
- Book X12 Orders (bookx12order) *
- EDI File Transmission
- EDI FILE RETRIEVAL Via FTP (ediretrievesftp)
- EDI File Receiving (edireceive)
- Book X12 Invoices (BOOKX12INVOICE ) *

* report instance for each vendor and currency
## Acquisitions Workflow: Keystrokes

<table>
<thead>
<tr>
<th>Paper Workflow</th>
<th>EDI Workflow</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate titles searched in Unicorn</td>
<td>Duplicate titles identified using resolver link</td>
</tr>
<tr>
<td>Copy searched in OCLC or created manually</td>
<td>Skeletal records provided, full MARC copy available</td>
</tr>
<tr>
<td>Orders keyed into Unicorn</td>
<td>Orders loaded automatically</td>
</tr>
<tr>
<td>Orders searched and placed in vendor system</td>
<td>Orders are placed with vendor automatically</td>
</tr>
<tr>
<td>Invoices keyed into Unicorn</td>
<td>Invoices loaded automatically</td>
</tr>
<tr>
<td>Invoices keyed into Banner</td>
<td>Invoices can be automatically extracted for Banner feed</td>
</tr>
</tbody>
</table>
Advantages: Selection

- Prompt arrival of new title notifications
- Interdisciplinary subject areas
- More information to aid with selection
- Identifies titles that have already been selected for purchase
- Provides an electronic record of purchases
- Allows 24/7 accessibility on and off campus
- Can quickly and easily be adjusted to meet changing needs and interests
Workflow Analysis: Best of Times

- Flow chart: Paper Processing
- Flow chart: Electronic Processing

- Electronic workflow definitely reduces processing time for selecting and purchasing new monographs.
- God bless us, every one!
Opportunities for Streamlining

- Modify slip profiles
- Selectors check for duplicates/older editions
- Purchase full MARC records from vendors
- Shelf-ready books
- Single currency per vendor
- Parse invoice lines from Unicorn and cross-walk into Banner
Workflow Analysis: Worst of Times

- Flow chart: Optimal Electronic Processing
- Flow chart: Electronic Processing in Three Interfaces
- Bah humbug!
The Three Vendors: Problems

- Training in three interfaces
- Multiple workflows
- Checking three interfaces for orders
- De-duping electronic slips from multiple vendors.
- Communicating with faculty
- Juggling over 40 different ILS reports
Where do we go from here?
Options

- Continue with Paper Slips
- Use One Primary Vendor
- Use Multiple Vendors Strategically
- Review New Title Notices from Multiple Vendor Profiles in One Centralized System
Enter WorldCat Selection

A new OCLC service based on Cornell University’s ITSO CUL software, which:

- Allows selectors to view electronic slip notices from multiple vendors in one system
- Allows all selectors using the service at your library to see their colleagues’ selection decisions which reduces the risk of accidental duplication of orders
- Provides OCLC MARC records to be loaded into the ILS at the point of order, thereby eliminating the need to rekey and import records from multiple sources
- Includes an option for automatic removal of duplicate slips
Our Slip Situation

In 2006/2007 Memorial University Library system received:

- 176,985 slips from our three main vendors
- 7% resulted in orders
- 93% of the slips received were either not appropriate to our needs or were duplicates
- Intra-vendor duplication is estimated to be between 19-30%
  (usually between US and UK profiles, different formats, & interdisciplinary subject profiles)
- Inter-vendor duplication is very difficult to determine, but, based on the data available from two of our three main vendors, the best estimate is about a 60% duplication rate between our main vendor profiles
Setting Up WorldCat Selection

- Notify Vendors
- Request User Authorizations
- Set Customized Institution Details
- Enter the Library’s Funds & Locations
- Define Collection Areas
- Set Up Record Distribution Mapping
  - LC and DDC call number ranges
  - Keywords and phrases
### Collection Area Summary

#### QE2
Memorial Univ/Newfoundland, Elizabeth li

**Collection Area:** ANTHROPOLOGY  
**Selectors:** Dianne Keeping

<table>
<thead>
<tr>
<th>Call Number Ranges</th>
<th>Keywords or Phrases</th>
<th>Marc Field(s)</th>
<th>Subfield</th>
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<td>72000-99</td>
<td>960</td>
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<tr>
<td>GF1</td>
<td>GF900</td>
<td>99 ANTHROPOLOGY</td>
<td>981</td>
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<tr>
<td>GN1</td>
<td>GN48</td>
<td>ANTHROPOL*</td>
<td>100-899</td>
</tr>
<tr>
<td>GN301</td>
<td>GN674</td>
<td>ETHNOGRAPH*</td>
<td>100-899</td>
</tr>
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<td></td>
<td>HERITAGE TOURISM</td>
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<td>MMAN</td>
<td>910</td>
</tr>
<tr>
<td></td>
<td></td>
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<td>100-899</td>
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<tr>
<td></td>
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<td>SOCIAL STRATIFICATION</td>
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#### Language
No data available.

#### Country of Publication
No data available.

#### Date or Date Range
No data available.

#### Government Publication
No data available.

#### Material Type
No data available.

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Using WorldCat Selection Selector Functions
## Inbox (2,896)

<table>
<thead>
<tr>
<th>Record</th>
<th>Fund</th>
<th>Source</th>
<th>Held</th>
<th>All</th>
<th>Author</th>
<th>Title</th>
<th>Publisher</th>
<th>Date</th>
<th>Call Number</th>
<th>Fund</th>
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</table>

**Warning:**
This folder currently contains more items than can be displayed.
Inbox Tabs
Selector Preferences

- Reject Items on Demand

- Inbox Sorting

- Deferred Reasons
Selector Preferences

- Select Your Funds
  - 72000-14: MAIN BOOK ENGLISH
  - 72000-15: MAIN BOOK FOLKLORE
  - 72000-16: MAIN BOOK GEOGRAPHY

- Select Your Location Codes
  - CNS: Centre for Newfoundland Studies
  - GREN: Grenfell Bookstacks
  - HSTK: Health Science Library Stacks
  - MAIN: QEI Stacks
  - MAPS: Map Library
  - MARI: Marine Stacks
  - MRC: Music Resource Centre
Selector Preferences

- Exclude by Keyword
- Exclude by Language
- Exclude by Country of Publication
Searching
American sports : an anthropological approach / edited by Alan Klein.

Authors: Klein, Alan.
Material Type: Book
Language: English
Publisher and Date: London ; New York : Routledge, 2008.
Physical Description: xiv, 260 p. ; 26 cm.
Series: Sport in the global society
LC Call Number: GV706.2 .A45 2008
Dewey Call Number: 796.0973
Notes: Includes bibliographical references and index.
OCLC Number: 191752882 | FirstSearch
ISBN: 9780415448307 | 0415448301
ISBN to Export First: 9780415448307 (hbk.)
FirstSearch Link

WorldCat Selection

Id ID 200809261037

Searching

Select

Inbox (1) | Selected (11) | Res

No holdings in QE2 - 20 other holdings

Price (USD) 140.00

Quantity 1

American sports : an anthropological approach

Authors Klein, Alan.
Material Type Book
Language English
Publisher and Date London ; New York : Routledge, 2008.
Physical Description xiv, 260 p. ; 26 cm.
Series Sport in the global society
Subjects Sports Social aspects.
LC Call Number GV706.2 .A45 2008
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Alan Klein

2008

English Book xiv, 260 p. ; 26 cm.
American sports: an anthropological approach

by Alan Klein:

Type: Book; English
Publisher: London; New York: Routledge, 2008.
ISBN: 9780415448307 0415448301
OCLC: 191752882
Related Subjects: Sports -- Social aspects, Sports -- Political aspects, Sports -- Economic aspects
Citations: Cite this Item | Export to EndNote | Export to RefWorks

Get It
- Search my library
- Buy from Amazon.com

Save It
- Add This Page to Favorites
- Save to...

Add to It
- Review this Item
- Tag this Item

Share It
- Link to this Page
- E-mail this Item

Services from Memorial University of Newfoundland Libraries for this item: Search the catalog at your library // OCLC FirstSearch
## Notification Details: Vendor Data

### Vendor Information

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<th>Field</th>
<th>Value</th>
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<td>Profile</td>
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<td>Readership Level (2)</td>
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<table>
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<th>Value</th>
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<td>Price in List Currency</td>
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<td>Invoice Currency</td>
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<tr>
<td>Price in Invoice Currency</td>
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Vendor Link
### Notification Details: Notes & Status

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<thead>
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<th>Note to Acquisitions</th>
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</thead>
<tbody>
<tr>
<td>Note to Selector</td>
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<tr>
<td>Note to Vendor</td>
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</table>

<table>
<thead>
<tr>
<th>Selector</th>
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<th>Origin</th>
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<tr>
<td>Richard Ellis</td>
<td>Memorial Univ/Newfoundland, Elizabeth li</td>
<td>Coutts</td>
<td>Inbox</td>
<td>20081004</td>
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<td>Anastasia Beaverhausen</td>
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ISBN to Export First: 9780415448307 (hbk.)

Vendor Information

Vendor Control Number: 5903066
Vendor Customer ID: 5755A00
Profile: MMPE
First Printed: United Kingdom
Book Type: Collected Articles (prev. publ.)
Interdisciplinary Studies: Anthropological
Problem Areas

• The system is slow & there are frequent internal server errors
• The automatic slip rejection feature is inconsistent
• More sort options are needed in the Inbox
• The price should be visible in the main Inbox screen
• Selectors should be able to keep a list of items that have been forwarded to colleagues
• The system does not yet have a built in user friendly faculty feedback option
Using WorldCat Selection Acquisitions Functions
Selected Items Summary

The number of currently selected records is 69

Export All Funds and Vendors

Export Selected Records

Distribution of selected records

<table>
<thead>
<tr>
<th>Select</th>
<th>Count</th>
<th>Fund Code</th>
<th>Fund Description</th>
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<tr>
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<td>26</td>
<td>72000-21</td>
<td>MAIN BOOK MATHEMATICS</td>
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<td>72000-38</td>
<td>MAIN BOOK PSYCH-SOC</td>
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<td>72000-03</td>
<td>MAIN BOOK BIOCHEMISTRY</td>
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<td>3</td>
<td>72000-05</td>
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<td>1</td>
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<td>MAIN BOOK PSYCH-SCI</td>
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<td>MAIN BOOK PHYSICS</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>72000-63</td>
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<td></td>
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<table>
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<tr>
<td>11</td>
<td>Dianne Keeping</td>
</tr>
<tr>
<td>13</td>
<td>Erin Alcock</td>
</tr>
<tr>
<td>45</td>
<td>Ian Gibson</td>
</tr>
</tbody>
</table>

Export Selected Records
Problem Areas

- Sirsi Unicorn is not yet completely EDIFACT compliant, so 9xx/x12 orders cannot be processed with the European vendors
- Possible solutions:
  - Patience! Enhancements to Unicorn’s EDIFACT functions are expected within the next year or two
  - Interim measure: records can be exported from WCS by vendor and the order placed in the usual pre-EDI manner
Problem Areas

- Acquisitions staff are not able to review and modify selections before exporting the records to the Library’s ILS
  - Possible solutions:
    - The addition of a title list feature to the Acquisitions Selected Items screen, so staff could view the list of selections by vendor, fund, selector, etc.
    - Proposed enhancements to the WCS Forwarding function would allow Selectors to simply forward their selections to the Acquisitions supervisor, but still retain a record of what they intend to purchase. Acquisitions would then make the selection in WCS and export to the ILS
    - Add Acquisitions authorizations to Selectors’ accounts so staff can review and export title selections directly from the Selector’s account
    - If all of the Worldcat Selection partners had hotlinks to their databases, then selections could be made directly in the vendor’s database
    - Sirsi Unicorn Selection module (maybe?!)
Problem Areas

- Vendors sometimes cancel intentional duplicate EDI orders that have been placed for branch libraries.
  - If this problem is occurring when placing orders in the vendor’s own system, what sort of problems will occur if branch library selectors are using WorldCat Selection?
This is a world of action, and not for moping and droning in.

Charles Dickens, *David Copperfield*
Conclusion

Is electronic selection a far, far better thing?

Maybe