'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 (ediretrieveftp)
- EDI File Receiving (edireceive)
- Book X12 Invoices (BOOKX12INVOICE) *

* report instance for each vendor and currency
<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><strong>End</strong></td>
<td><strong>Keyword or Phrase</strong></td>
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<tr>
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<td>72000-99</td>
<td>u</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>
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<td>GN674</td>
<td>ETHNOGRAPH*</td>
<td>100-899</td>
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<td>HERITAGE TOURISM</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.
Using WorldCat Selection Selector Functions
### Main Inbox

This folder currently contains more items than can be displayed.

#### Inbox (2,896)

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<tr>
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<td>&quot;Sister outsiders&quot;: the representation of identity and difference in selected writings by South African Indian women</td>
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Inbox Tabs
Selector Preferences

- Reject Items on Demand

- Inbox Sorting

- Deferred Reasons
Selector Preferences

- Select Your Funds

- Select Your Location Codes
Selector Preferences

- Exclude by Keyword
- Exclude by Language
- Exclude by Country of Publication
Title Lists

Inbox (2896) | Selected (11) | Forwarded to Me (4) | Deferred (104) | Rejected (542) | Exported (37)
Searching

Search Notification Records

Search In: Inbox

For: [search field]
and: [search field]
and: [search field]
and: [search field]
and: [search field]
and: [search field]
and: [search field]
and: [search field]
and: [search field]
and: [search field]

Fields:
- Title
- Author
- Publisher
- Subject
- Deferred Reason
- Call Number
- Publication Date
- Added Date
- Source
- Projected Date

[Search] [Clear]
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
- Subjects: Sports Social aspects. ; Sports Political aspects. ; Sports Economic aspects.
- 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.)
Resolver Link

Your requested book:
- **Book Title**
- **Published:**
- **ISBN:** 0415448301

Links for Print Books at Memorial University of Newfoundland

Request information for this Book
- **Number:** 0415448301
- **Search at:** Memorial University of Newfoundland

ISBN "0415448301" found no matches in any library.

You may change your search, or select a new search from the
American sports : an anthropological approach / Alan Klein.

2008

English  Book xiv, 260 p. ; 26 cm.

ISBN 9780415448307

Memorial University of Newfoundland Libraries

FirstSearch: WorldCat Detailed Record - Windows Internet Explorer

WorldCat Detailed Record

Click on a checkbox to mark a record to be e-mailed or printed in Marked Records.

FirstSearch: WorldCat Detailed Record - Windows Internet Explorer

American sports : an anthropological approach / Alan Klein.
American sports: an anthropological approach

by Alan Klein

(Not yet rated)

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

User-created lists: This item is featured on 1 public list(s).

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Buy from Amazon.com

Save It
Add This Page to Favorites
Save to: [New List] → Save

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

No holdings in QE2 - 20 other holdings

Price (USD) 140.00
Quantity 1

ISBN to Export First 9780415448307

WorldCat.org Link
### Vendor Information

**Vendor Control Number**: 5903066  
**Vendor Customer ID**: 5755A00  
**Profile**: MMPE  
**First Printed**: United Kingdom  
**Edition**: Newly Published Works  
**Binding**: Cloth  
**Sets and Series**: Unnumbered  
**Readership Level (1)**: Graduate - Research  
**Readership Level (2)**: Upper Undergraduate  
**Geographic Characteristics**: United States  

**Book Type**: Collected Articles (prev. publ.)  
**Interdisciplinary Studies**: Anthropological  
**Interdisciplinary Studies**: Sociological  
**Interdisciplinary Studies**: Gender/Sexualities Studies  
**List Currency**: USD  
**Price in List Currency**: 140.00  
**Invoice Currency**: USD  
**Price in Invoice Currency**: 140.00
Vendor Link
### Notification Details: Notes & Status

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<th>Note to Acquisitions</th>
<th>Characters remaining = 500</th>
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</thead>
<tbody>
<tr>
<td>Note to Selector</td>
<td>Characters remaining = 500</td>
</tr>
<tr>
<td>Note to Vendor</td>
<td>Characters remaining = 500</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Selector</th>
<th>Institution</th>
<th>Origin</th>
<th>Status</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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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: 191752662
ISBN: 9780415448307 | 0415448301
ISBN to Export First: 9780415448307 (hbk.)
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

<table>
<thead>
<tr>
<th>Select</th>
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<th>Fund Description</th>
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<td>26</td>
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<td>1</td>
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<table>
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<th>Selector Name</th>
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<tbody>
<tr>
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</tr>
<tr>
<td>13</td>
<td>Erin Alcock</td>
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<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