

'Tis a Far Far Better Thing...Maybe

Electronic Selection in a Multi-Vendor Environment

Charleston Conference 2008

Dianne Keeping & Lisa Goddard

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 $\sim 15,000$ 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



Bibs and Orders
imported to ILS
(9xx)



Orders uploaded
from ILS to vendor
(X12)



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

Acquisitions Workflow : Keystrokes

Paper Workflow	EDI Workflow
Duplicate titles searched in Unicorn	Duplicate titles identified using resolver link
Copy searched in OCLC or created manually	Skeletal records provided, full MARC copy available
Orders keyed into Unicorn	Orders loaded automatically
Orders searched and placed in vendor system	Orders are placed with vendor automatically
Invoices keyed into Unicorn	Invoices loaded automatically
Invoices keyed into Banner	Invoices can be automatically extracted for Banner feed

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

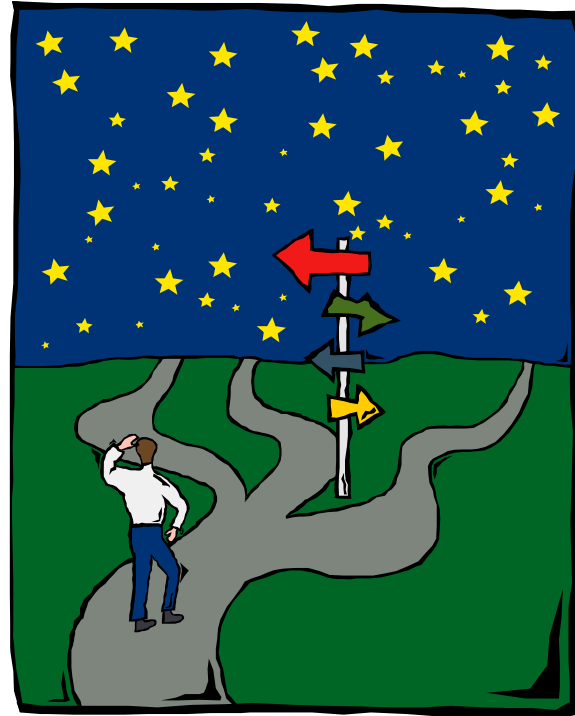
Workflow Analysis: Worst of Times

- 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 II

Collection Area : **ANTHROPOLOGY**

Selectors : **Dianne Keeping**

[Previous](#) | [Next](#) | [Back To List](#)

Call Number Ranges	
Start	End
301	307.99999
GF1	GF900
GN1	GN48
GN301	GN674

Keywords or Phrases		
Keyword or Phrase	Marc Field(s)	Subfield
72000-99	960	u
99 ANTHROPOLOGY	981	a
ANTHROPOL*	100-899	
ETHNOGRAPH*	100-899	
HERITAGE TOURISM	100-899	
MMAN	910	d
SOCIAL CONFLICT	100-899	
SOCIAL STRATIFICATION	100-899	

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

WorldCat Selection™

OCLC®

Help

Build ID 200809261037

Searching

Select

Acquisitions

Administrator

Preferences

Logoff

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

Warning

This folder currently contains more items than can be displayed.

Inbox (2,896)

Record

Fund

Location

Forward To

Deferred Reason

Action

	<input type="checkbox"/>	Added	Source	Held	All	Author	Title	Publisher	Date	Call Number	Fund
1	<input type="checkbox"/>	20081012	Blackwell-US		11	Govinden, Devarakshanam Betty.	"Sister outsiders' : the representation of identity and difference in selected writings by South African Indian women /	University of South Africa Press,	2008	820.99287	
2	<input type="checkbox"/>	20081025	Blackwell-US		10	Downey, Carolyn J.	50 ways to close the achievement gap /	Corwin Press,	2009	LB1062.6 .A15 2009	
3	<input type="checkbox"/>	20081005	Blackwell-US		7	Knopf, Kerstin.	Aboriginal Canada revisited /	University of Ottawa Press,	2008	E78.C2 A26 2008	
4	<input type="checkbox"/>	20081012	Blackwell-US		5	DeLuca, Doreen.	Access : multiple avenues for deaf people /	Gallaudet University Press,	2008	HV2545 .A32 2008	
5	<input type="checkbox"/>	20081018	Blackwell-		5	Packham, Carol.	Active citizenship and	Learning Matters.	2008	HM761 .P33 2008	

Inbox Tabs

Searching

Selector

Acquisitions

Administrator

Preferences

Logoff

Selector Preferences

- Reject Items on Demand

Reject Items on Demand

Reject All Notification Items ?

If Already Held If Selected By Others

- Inbox Sorting

Notification List Default	Field	Direction
Primary Sort	Title ▼	Ascending ▼
Secondary Sort	Call Number ▼	Ascending ▼

- Deferred Reasons

1	Social Work Order
2	Social Psych Maybe

Selector Preferences

- Select Your Funds

<input type="checkbox"/>	72000-14	MAIN BOOK ENGLISH
<input checked="" type="checkbox"/>	72000-15	MAIN BOOK FOLKLORE
<input type="checkbox"/>	72000-16	MAIN BOOK GEOGRAPHY

- Select Your Location Codes

<input type="checkbox"/>	Location	Description
<input type="checkbox"/>	CNS	Centre for Newfoundland Studies
<input type="checkbox"/>	GREN	Grenfell Bookstacks
<input type="checkbox"/>	HSTK	Health Science Library Stacks
<input checked="" type="checkbox"/>	MAIN	QEII Stacks
<input type="checkbox"/>	MAPS	Map Library
<input type="checkbox"/>	MARI	Marine Stacks
<input type="checkbox"/>	MRC	Music Resource Centre

Selector Preferences

- Exclude by Keyword

Delete	MMWG	910	d	Coutts
Delete	SPRINGER	260	b	All Vendors

- Exclude by Language

Delete	All But	eng	?	Harrassowitz
Delete	All But	eng	?	Casalini Libri

- Exclude by Country of Publication

All But	xxx	?	Coutts
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Title Lists

Searching

Selector

Acquisitions

Administrator

Preferences

Logoff

[Inbox \(2896\)](#) | [Selected \(11\)](#) | [Forwarded to Me \(4\)](#) | [Deferred \(104\)](#) | [Rejected \(542\)](#) | [Exported \(37\)](#)

Searching

Search Notification Records

Search In 

For

and

and

and

and

and

and

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Notification Details: OCLC Data

No holdings in QE2 - 20 other holdings 

[Back To List](#)

Price (USD)

Fund

Deferral

Quantity

Location

Forward To

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

Select

Reject

Defer

Forward

Save

Cancel

Text Only

Resolver Link

Memorial University Libraries Catalogue

New Search Journal Titles Research Portal Reserve Desk My Account

Go Back Help Previous

Next [Library Home Page](#)

ISBN "0415448301" found no matches in any library.

You may change your search, or select a new search from the

Change your search words

Sirsi Resolver - Windows Internet Explo... [Catalogue] Memorial University Librari...

http://mun-resolver.a... http://info.library.mur...

Google Google

Sirsi Resolver [Catalogue] Memorial Univ...

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Your requested book:

Book Title

Published:

ISBN: 0415448301

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Request information for this Book

Number: 0415448301

search at -->Memorial University of Newfoundland

191752882 [FirstSearch](#)

ISBN 9780415448307 | 0415448301

ISBN to Export First 9780415448307 (hbk.)

No holdings in QE2 - 20

Price (USD) 140.00

Quantity 1

American sports

Authors

Material Type

Language

Publisher and Date

Physical Description

Series

Subjects

LC Call Number

Dewey Call Number

Notes

FirstSearch Link

OCLC Selection

WorldCat Selection™

id ID 200809261037

Searching Selected

Inbox (1) | Selected (11) | F

No holdings in QE2 - 20 other holdings

Price (USD) Fund

Quantity Location

American sports : an anthropological

Authors Klein, Alan.
Material Type Book
Language English
Publisher and Date London ; New York : Routledge
Physical Description xiv, 260 p. ; 26 cm.
Series Sport in the global society
Subjects Sports Social aspects. | Sp
LC Call Number GV706.2 .A45 2008
Dewey Call Number 796.0973
Notes Includes bibliographical ref
OCLC Number [191752882](#) [FirstSearch](#)
ISBN [9780415448307](#) [0415448](#)
ISBN to Export First

FirstSearch: WorldCat Detailed Record - Windows Internet Explorer

http://firstsearch.oclc.org/h... Google

FirstSearch

Memorial University of Newfoundland Libraries

WorldCat Detailed Record

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

Home Databases Searching Results Staff View | My Account Comments | E

List of Records Detailed Record Marked Records Saved Records Go to page

Subjects Libraries E-mail Print Export Help WorldCat results for: no: 191752882. Record 1 of 1.

Prev Next Mark:

Detailed Record Add/View Comments

American sports : an anthropological approach /

Alan Klein

2008 English Book xiv, 260 p. ; 26 cm.

WorldCat.org Link

OCLC Selection

WorldCat Selection™

Build ID 200809261037

Searching

Inbox (1) | Sele

No holdings in QE2 - 20 other holdings


Price (USD) Full

Quantity Loc

American sports : an anthrop

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 context
Subjects	Sports -- Social aspects
LC Call Number	GV706.2 .A45 2008
Dewey Call Number	796.0973
Notes	Includes bibliographical references.
OCLC Number	191752882
ISBN	9780415448301
ISBN to Export First	9780415448301

Vendor Information



American sports : an anthropological approach [WorldCat.org] - Windows Internet Explorer

http://www.worldcat.org/oclc/191752882

WorldCat®

Home | My WorldCat | Lists | Search | Signed into WorldCat

Search for items: [Adv](#)

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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Services from Memorial University of Newfoundland Libraries for this item: [Search the catalog at your library](#) | [OCLC FirstSearch](#)

Notification Details: Vendor Data

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

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](#)

Note to Acquisitions	
Note to Selector	
Note to Vendor	

Selector	Institution
Richard Ellis	Memoria
Anastasia Beaverhausen	Memoria

OASIS™ Oct 30, 2008 - Windows Internet Explorer

http://couthsoasis.com/Main/OAS

OASIS™ Oct 30, 2008

OASIS™ Dianne Keeping - Memorial University - Home | Help | Hide Menu | Logout
 Main Library

Home
 Search
 Orders
 Order History
 Invoice History
 Authorize Orders
 Approval Plans
 iApprove Profiles
 Help & Support
 Contacts
 Feedback
 Current Canadian Books
 MyLibrary

COUTTS
 Serving the world of learning

History
 Results | Sort by Year
 1 of 1 results | 25 | 50 | 100 results per page | 1 page
 Revise Search

Title	Publisher	Year	Cart Lists
American sports : an anthropological approach / edited by Alan Klein ISBN: 9780415448307 [0-415-	Routledge	2008	

Title Details | MARC | **Check Status** | Order Info | Original Order

Title American sports : an anthropological approach / edited by Alan Klein


Internet 100%

Notification Details: Notes & Status

Note to Acquisitions	<input type="text"/>	▲ ▼ Characters remaining = 500
Note to Selector	<input type="text"/>	▲ ▼ Characters remaining = 500
Note to Vendor	<input type="text"/>	▲ ▼ Characters remaining = 500

Selector	Institution	Origin	Status	Updated
Richard Ellis	Memorial Univ/Newfoundland, Elizabeth li	Coutts	Inbox	20081004
Anastasia Beaverhausen	Memorial Univ/Newfoundland, Elizabeth li	Coutts	Inbox	20081004

Inbox Record 1 of 1

No holdings in QE2 - 20 other holdings 

[Back To List](#)

Price (USD)

Fund

Deferral

Quantity

Location

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Notes Includes bibliographical references and index.
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ISBN [9780415448307](#) | [0415448301](#)
ISBN to Export First

Select

Reject

Defer

Forward

Save

Cancel

Text Only

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

Selected Items

The number of currently selected records is 69

Export All Funds and Vendors

Export Selected Records

Distribution of selected records

Select	Count	Fund Code	Fund Description
<input type="checkbox"/>	26	72000-21	MAIN BOOK MATHEMATICS
<input type="checkbox"/>	2	72000-15	MAIN BOOK FOLKLORE
<input type="checkbox"/>	1	72000-38	MAIN BOOK PSYCH-SOC
<input type="checkbox"/>	7	72000-03	MAIN BOOK BIOCHEMISTRY
<input type="checkbox"/>	3	72000-05	MAIN BOOK CHEMISTRY
<input type="checkbox"/>	1	72000-37	MAIN BOOK PSYCH-SCI
<input type="checkbox"/>	1	72000-25	MAIN BOOK PHYSICS
<input type="checkbox"/>	2	72000-63	MAIN BOOK GENERAL SCIENCE & TECHNOLOGY
<input type="checkbox"/>	19	72000-01	MAIN BOOK COMPUTER SCIENCE
<input type="checkbox"/>	6	72000-70	MAIN BOOK WOMEN'S STUDIES
<input type="checkbox"/>	1	72000-99	MAIN BOOK ANTHROPOLOGY

Select	Count	Vendor
<input type="checkbox"/>	4	Blackwell-UK
<input type="checkbox"/>	54	Blackwell-US
<input type="checkbox"/>	11	Coutts

Count	Selector Name
11	Dianne Keeping
13	Erin Alcock
45	Ian Gibson

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