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The Big Picture: A Holistic Viewpoint of E-book Acquisitions

Ron Lewis

Loyola Marymount University, rlewis@lmu.edu

Marie R. Kennedy

Loyola Marymount University

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The Big Picture: A holistic viewpoint of e-book acquisitions

Ron Lewis and Marie R. Kennedy
Loyola Marymount University
Charleston Conference November 3, 2016

Agenda

The e-book workflow landscape
The workflow map that inspired us
From single maps to a merged map
Next steps

Agenda



Discussion



The e-book workflow landscape
The workflow map that inspired us
From single maps to a merged map
Next steps

Some e context

Who we are

Ron Lewis, Acquisitions Librarian

**Marie Kennedy, Serials & Electronic
Resources Librarian**

Loyola Marymount University



The other players

Budget Analyst
Collection Development Committee
Cataloging Librarian
Electronic Resources Assistant
Head of Acquisitions and Collection Development
Librarians
Ordering Assistant
Patrons
Systems Department
Student workers

The Why

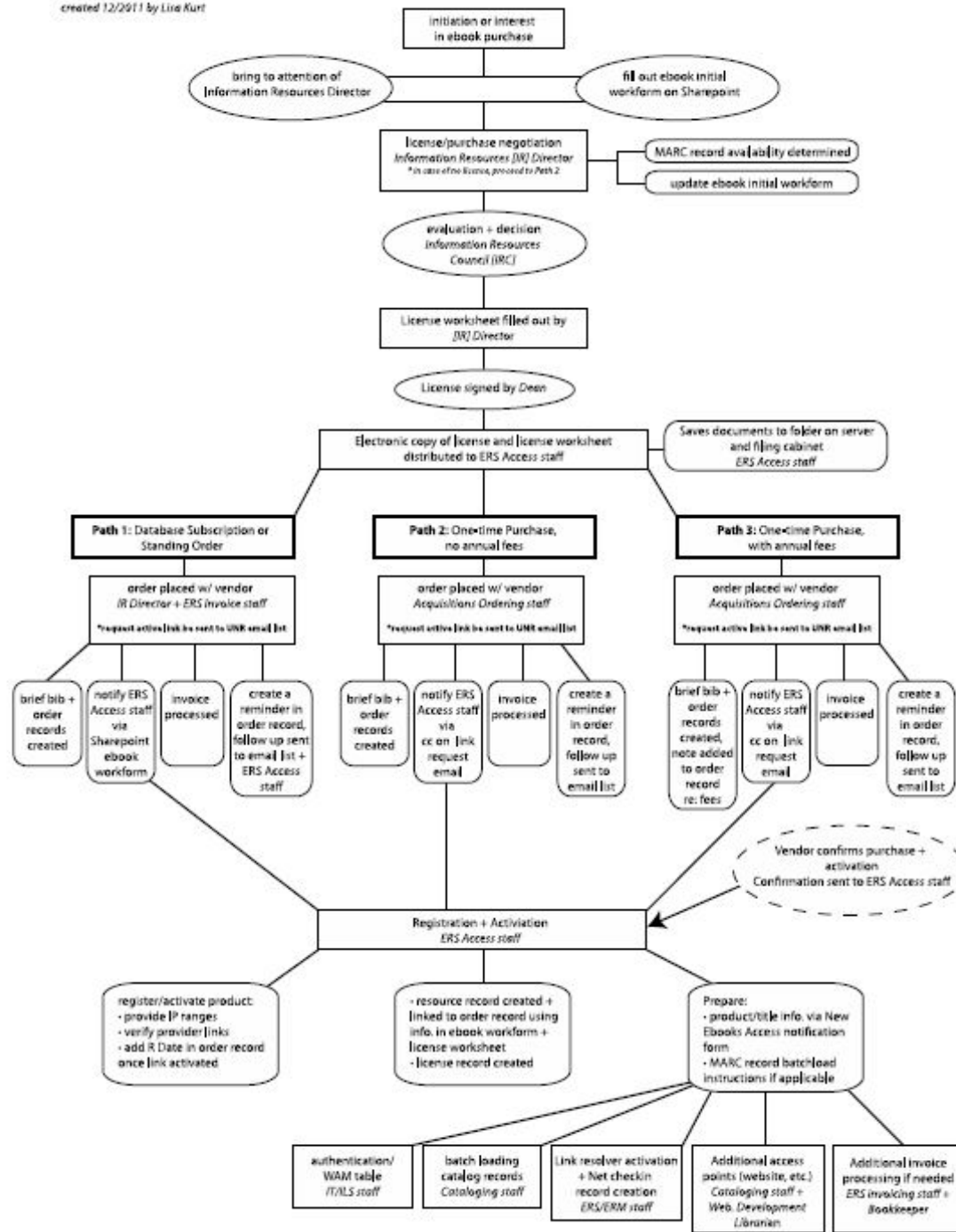
Our inspiration



Amalia Beisler and Lisa Kurt.
2012.

**E-book Workflow from
Inquiry to Access: Facing
the Challenges to
Implementing E-book
Access at the University of
Nevada, Reno**

Collaborative Librarianship 4,
no. 3.



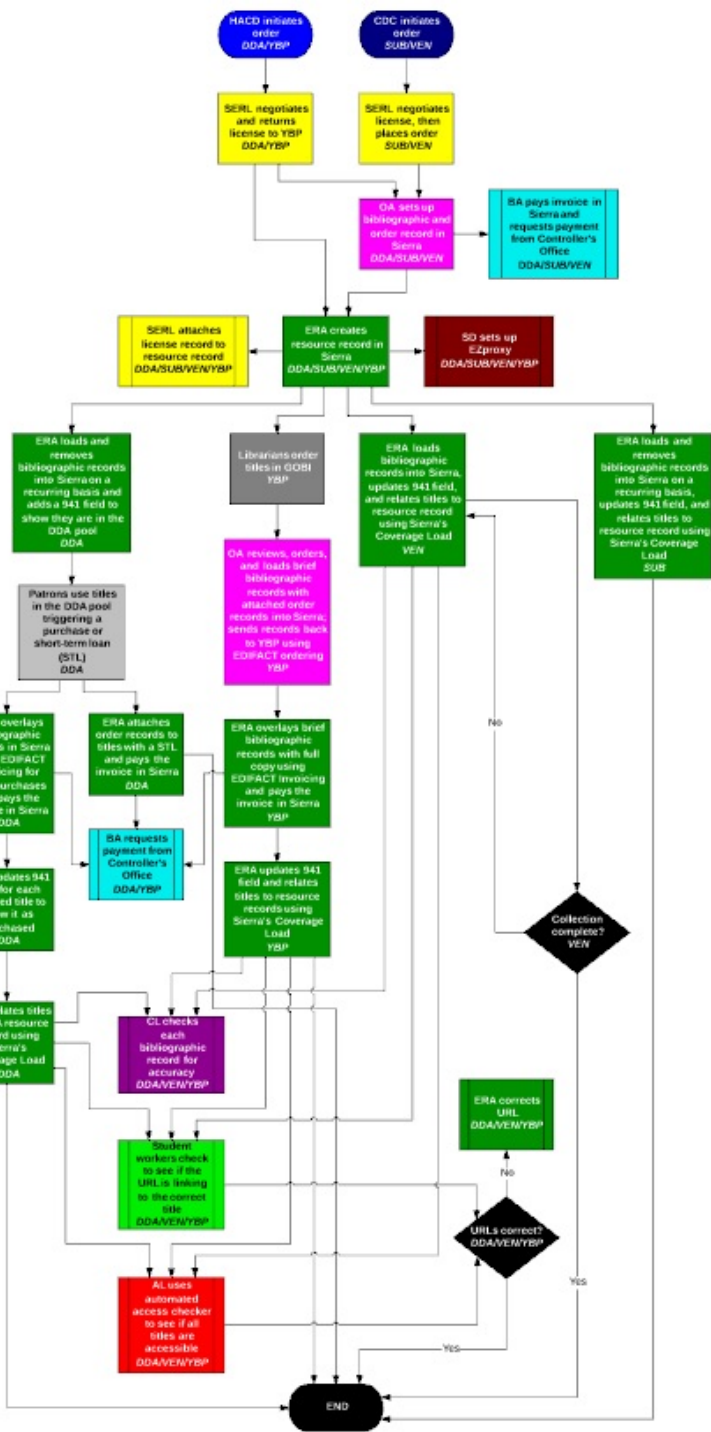
dadaamn

you have to
make one
of these

ermined

form

Ron said OK



Beisler & Kurt

1. Database Subscription or Standing Order
2. One-time Purchase, no annual fees
3. One-time Purchase, with annual fees

Lewis & Kennedy

1. E-Book Purchased Through YBP
2. E-Book Subscription Database
3. Demand-Driven Acquisition E-Book
4. E-Book Purchased from Vendor

Differences

AL
Acquisitions
Librarian
Red #ff0000

BA
Budget Analyst
Aqua #00e0e0

CDC
Collection
Development
Committee
Navy #000080

CL
Cataloging
Librarian
Purple #900090

ERA
Electronic
Resources
Assistant
Green #009000

HACD
Head of
Acquisitions and
Collection
Development
Blue #0000ff

Librarians
Gray #808080

OA
Ordering
Assistant
Fuchsia #ff00ff

No person
Black #000000

Patrons
Silver #c0c0c0

SD
Systems
Department
Maroon #800000

SERL
Serials and
Electronic
Resources
Librarian
Yellow #ffff00

Student workers
Lime #00ee00

Terminator

Process

Predefined
Process

Decision

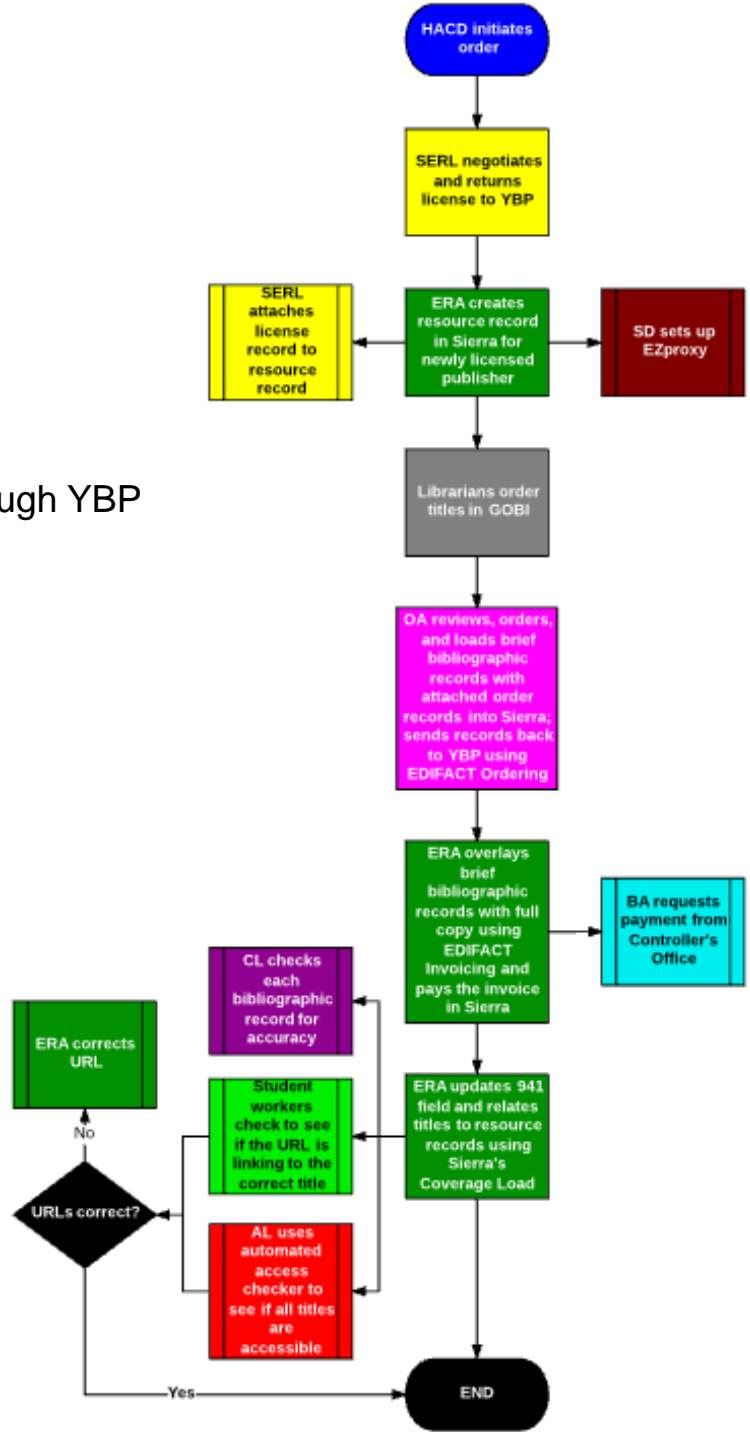


Oxford Scholarship Online

WILEY



E-Book Purchased Through YBP





```
graph TD; A[ ] --> B[OA reviews, orders, and loads brief bibliographic records with attached order records into Sierra; sends records back to YBP using EDIFACT Ordering]; B --> C[ ]
```

OA reviews, orders, and loads brief bibliographic records with attached order records into Sierra; sends records back to YBP using EDIFACT Ordering

Ordering - eBooks - YBP

as noted by IT from Linn's message

Library administrators Librarian Librarian as regular Librarian as regular Learning administrator Online resource Registrar Learning administrator

It is available. This documentation shows the procedure for entering in eBooks through COBI.

Purpose: This process demonstrates how to input orders created by Librarian activities in COBI (<http://www.gobi.com/SignUp/Login.aspx>). It should be performed once a week to ensure orders are not built up.

Key Features:

- Creating Checklist

Trigger job:

- To avoid backlog and delayed processing, the Creating Checklist will monitor order submissions for each of the populated Subaccounts in COBI at regular intervals.
- A workflow is set by the Collection Development Librarian to push orders through by a certain date and time outside of the regular interval.

Frequency:

- Weekly, usually on Friday

Ordering/Checklist Runlog: A backup will only perform this procedure if the Ordering has been positioned to occur for more than a week.

- Electronic Resources Checklist
- Capitalize Librarian

Process Map

Ordering/Checklist

1. Under the Search bar at the top, click **Select Item**

2. If there are orders to input, you will see COBI-02 US B0001 020802 listed under **Subaccounts**, highlight this **Subaccount** and click **Search**

3. Each selected title must be reviewed for accuracy and to present a good quality. Things to review include:

1. Make sure that the **Subaccount** (COBI-02) is paired with its corresponding **Vendor Code** (000)
2. Make sure the **Title**, **Author**, and **Print Code** (must always end in "101") titles are entered properly
3. Make sure the **Supplier** and **Business Option** titles are entered. See [Priority Ranking](#) button for appropriate suggestions/purchase options
4. Check the notes in the column on the far right. Indicators of duplicate orders can be found in this column, such as **Already Owned by Library**, **WIP Bids**, **Preparing to Bid**, **All Bidding**, or **Library Open Order**. If yes, the title can be removed as it there is a note that says "Library order COBI request sent", and the title is done using the COBI. If the title is "found and confirmed" COBI (Library/COBI/COBI) goes to [Library/COBI/COBI](#) page (please go to the authority on "COBI processing" in the 5.0.0.0.000 book, you may delete that title record to remove it from the COBI page, as you will not be purchasing a copy). Ensure the records are attached to the title.
5. To make any corrections, click the **pen** to the left of the title and click the **Order Details** button. Enter appropriate details and click **Save** to continue
6. When all orders have been reviewed, click the **Mark All Items On All Order** button, click **Submit Cart**, and select **Submit Cart** from the drop down
7. Go to the **Submit Cart**. All titles should have a **Green Light** next to them, ensuring they are ready to input. If there are any **Red Lights**, enter any missing information
8. Click **Submit Green Lights**
9. A confirmation email will be sent to your email, which should be filed in the YBP user's email box folder in the COBI email account. YBP records should not be available for input in **Order's Data Exchange**

See procedure: [Submit Orders - Submitting the Submit File and Submitting Orders](#) EIT, make sure to use the last title Linn's [Submit Book File \(SBF\)](#) instead

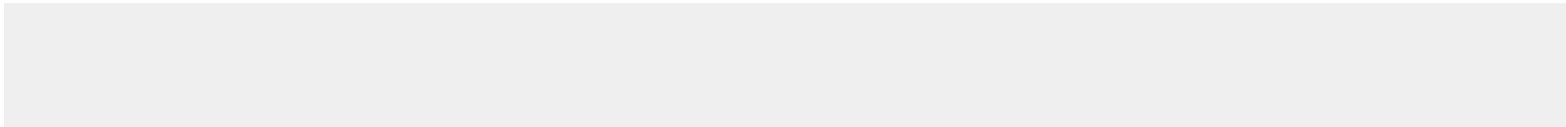
Priority Ranking for Bids, Suppliers/Purchase Orders

If there are only need to input one simultaneous session, it available:

1. Library SLPD
2. BBL/COBI / User

If there are need multiple simultaneous user sessions (that is the only option):

1. Library SLPD
2. BBL/COBI in BBL Team/Order Landing (in whatever is changed)
3. BBL/COBI / User



Introduction: This documentation shows the procedure for ordering in eBooks through GOBI.

Purpose: This process demonstrates how to export orders created by librarian selectors in GOBI (<http://www.gobi3.com/Pages/Login.aspx>). It should be performed once a week to ensure orders do not build up

Staff involved:

- Ordering Assistant

Trigger point:

- To avoid backlog and delayed processing, the Ordering Assistant will monitor order submissions for each of the populated Subaccounts in GOBI at regular intervals.
- A deadline is set by the Collection Development Librarian to push orders through by a certain date and time outside of the regular interval.

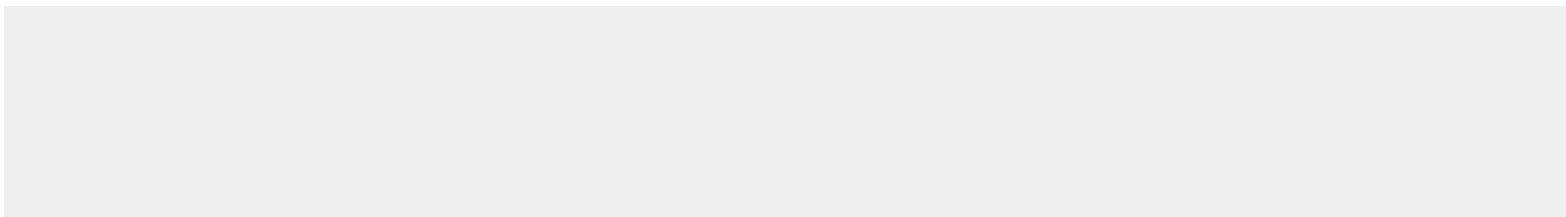
Frequency:

- Weekly, usually on Friday

Ordering Assistant Backups: A backup will only perform this procedure if the Ordering Assistant position is out for more than a week.

- Electronic Resources Assistant
- Acquisitions Librarian

Process Map



2. If there are orders to export, you will see 8006-40 US EBOOK ORDERS listed under **Subaccounts**, highlight this **Subaccount** and click **Search**

The screenshot shows the GOBI® web interface. At the top, there is a search bar with a dropdown menu set to 'Any Words' and a 'Search' button. Below this is a navigation bar with links for 'Spotlight Lists', 'Search', 'Notifications', 'Folders', 'Reports', 'Options', 'Library', and 'Links'. A 'Search Selections' section contains 'Clear Form', 'Retrieve Parameters', and a 'Search' button with a green arrow icon. On the left, 'Search Selections By' has radio buttons for 'Duplicate selections only' and 'Search parameters below'. Below that is a 'Date Selected' field with a dropdown and a calendar icon. The 'Subaccount' dropdown is set to 'All', and a list of subaccounts is shown below it, with '8006-40 US EBOOK ORDERS' highlighted in red. On the right, an 'eBook' section has a checkbox for 'Only show downloadable items', a 'Selections' section with radio buttons for 'Include', 'Exclude', and 'eBook only', and a 'Supplier' dropdown menu with options like 'Al Manhal', 'Brill Online eCollections', 'Cambridge UP Online', and 'CQ Press Online'.

3. Each selected title must be reviewed for accuracy and to prevent duplication. Things to review include:
- Make sure that the **Subaccount** (8006-40) is paired with its corresponding **Vendor Code** (YBPE)
 - Make sure the **Initials**, **Selector**, and **Fund Code** (must always end with '-ec') fields are entered properly
 - Make sure the **Supplier** and **Purchase Option** fields are entered. See **Priority Ranking** below for appropriate suppliers/purchase options
 - Check the notes in the column on the far right. Indications of duplicate orders can be found in this column, such as **Already Owned by Library**, **Will Ship**,

Preparing to Ship, **At Bindery**, or **Library Open Order**. If so, the title can be removed

- If there is a note that says "ebrary auto DDA record sent", find the title in Sierra using the ISBN. If the title is found and contains

"DDA(ebrary)SUPOsDDApool(yrotating)zNo authority or TOC processing" in the MARC 941 field, you may

delete that bib record to remove it from the DDA pool, as we will now be purchasing a copy. Ensure no records are attached to the bib.

- To make any corrections, click the bar to the left of the title and click the **Enter Order Details** button. Enter appropriate details and click **Save** to continue
- When all orders have been reviewed, click the **Mark All Items On All Pages** button, click **Add to Cart**, and select **Export Cart** from the drop down
- Go to the **Export Cart**. All titles should have a **Green Light** next to them, ensuring they are ready to export. If there are any **Red Lights**, enter any missing information
- Click **Export Green Lights**
- A confirmation email will be sent to your email, which should be filed in the **YBP confirmations** folder in the ACQSER email account. MARC records should now be

available for import in Sierra's **Data Exchange**

[see procedure [GobiExport – Getting the Export File and Queuing Orders](#) BUT, make sure to use the load table **Load a GobiEbook file (YBP)** instead.]

Priority Ranking for Ebook Suppliers/Purchase Options:

Where we only need single-user simultaneous access, if available.

- ebrary SUPO
- EBSCOhost 1 User

Where we need multiple simultaneous user access (or that is the only option).

- ebrary MUPO
- EBL 3 User or EBL Non-Linear Lending (whichever is cheaper)
- EBSCO 3 User



E-Book Subscription Database



Resource Alert

There is a printing limit of 60 pages per session. ebrary performs system maintenance on the first Tuesday of each month from 8:00 - 10:00 pm, pacific time. The service may be unavailable during those time periods.

Resource Name ebrary

Description ebrary's Academic Complete now exceeds 100,000 titles from the world's leading publishers. Academic Complete continues to be the largest multidisciplinary e-book database licensed to libraries throughout the world, under a simultaneous, multi-user access model with continual growth. Furthermore, Academic Complete enables libraries to upload and integrate their own digital materials such as theses and dissertations, yearbooks, and newspapers with DASH!™ (Data Sharing, Fast).

Publisher ebrary, Inc

Resource Type E-Book Collection

Search Platform

Resource Format HTML & PDF

Connect to Mobile Get the iOS or Android app, then follow this link for directions on setting up an account: [http://support.ebrary.com/kb/sign-](http://support.ebrary.com/kb/sign-in-on-mobile-app/)

Version [in-on-mobile-app/](#)

Subject E-books

General and Multidisciplinary

License

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| Concurrent Users | Unlimited |
| Permitted Use | Instructors may link to this from Blackboard. |
| Document Delivery Staff Permitted Use | Ariel |

Titles Included In This Resource

Coverage Full Text

| | |
|---|--------|
| 1,1'-binaphthyl-based chiral materials [electronic resource] : our journey / Lin Pu. | ebrary |
| 1 & 2 Timothy and Titus : a commentary / Raymond F. Collins. | ebrary |
| 1 Enoch 91-108 [electronic resource] / Loren T. Stuckenbruck. | ebrary |
| 1 Esdras [electronic resource] : introduction and commentary on the Greek text in Codex Vaticanus / by Michael R. Bird. | ebrary |
| 1 Peter [electronic resource] / David G. Horrell. | ebrary |
| 10 minute consultation [electronic resource] : cardiovascular risk / advisory board, Dr Jehad Aldegather ... [et al.]. | ebrary |
| The 10-minute consultation [electronic resource] : chronic obstructive pulmonary disease / Dr. Kevin Gruffydd-Jones ... [et al.]. | ebrary |
| The 10-minute consultation [electronic resource] : type 2 diabetes mellitus / advisory board, Roger Gadsby ... [et al.]. | ebrary |
| 10 minute ENT consult / Hamid R. Djalilian, MD. | ebrary |
| 10 PRINT CHR\$(205.5+RND(1));GOTO 10 [electronic resource] / Nick Montfort ... [et al.]. | ebrary |
| 10 top tips for identifying neglect [electronic resource] / Pat Beesley. | ebrary |
| 10 virtues of outstanding leaders [electronic resource] : leadership & character / Al Gini and Ronald M. Green. | ebrary |

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[Search Platform](#)

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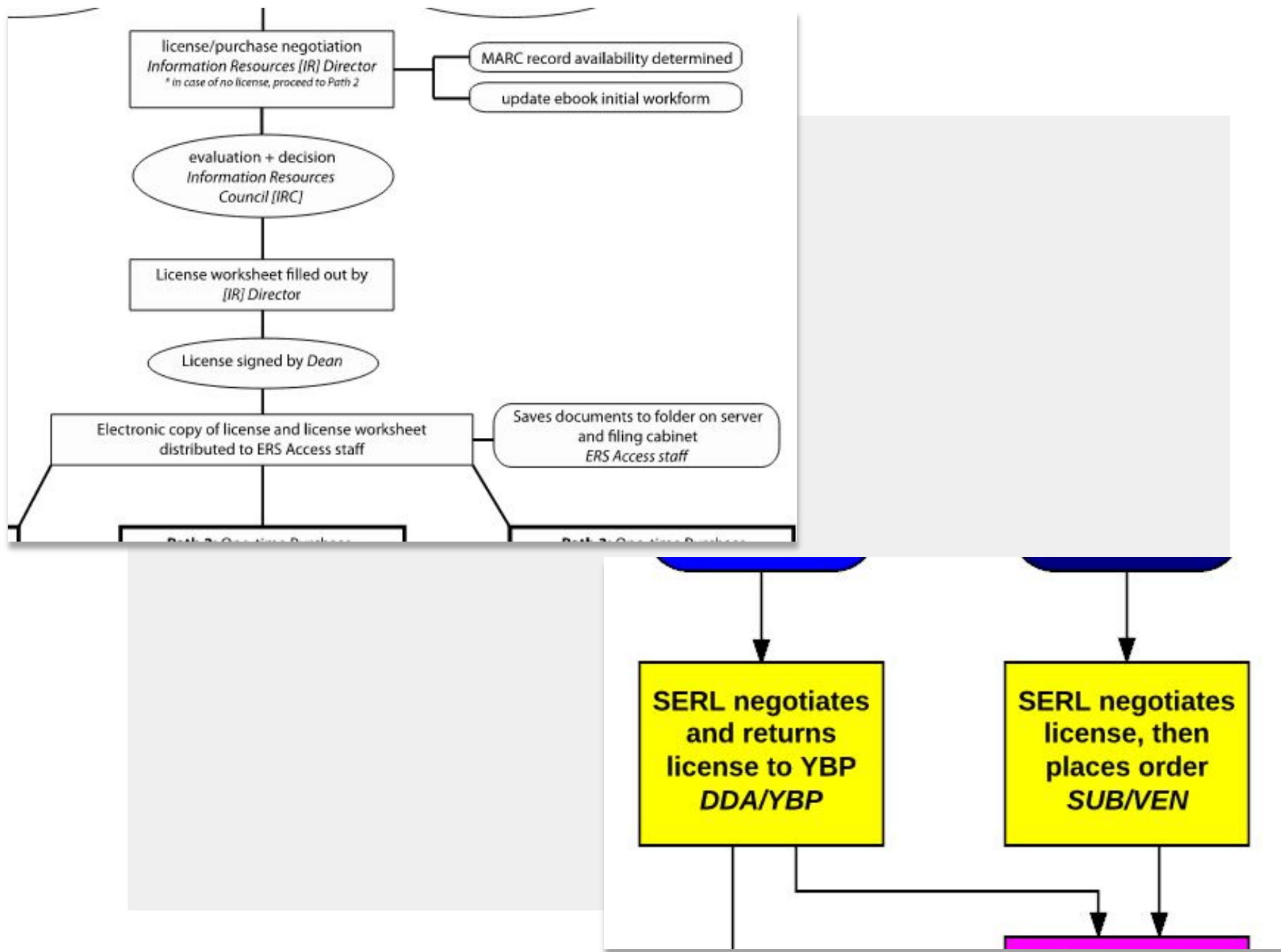
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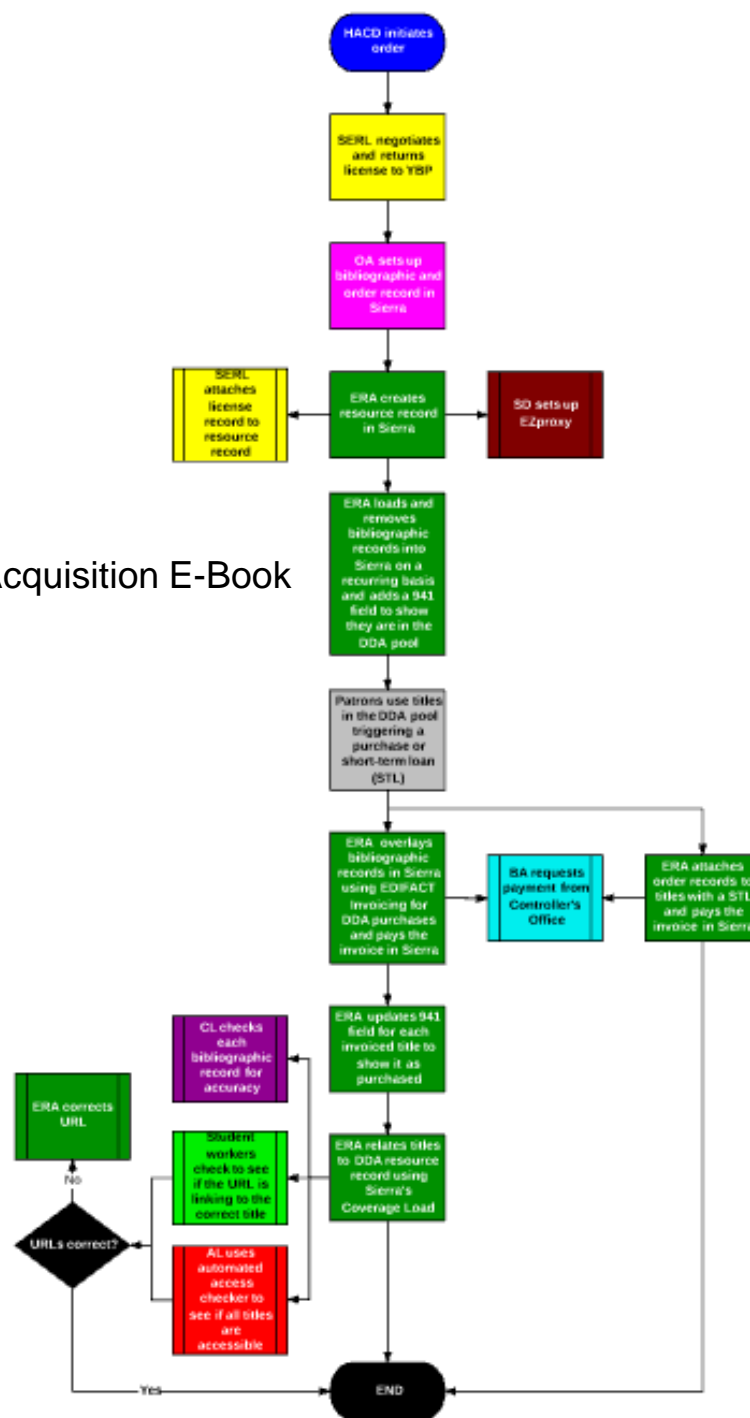
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E-Resource





Demand-Driven Acquisition E-Book





BRILL



Springer

The
Cambridge
Histories

A unique reference collection



E-Book Purchased from Vendor

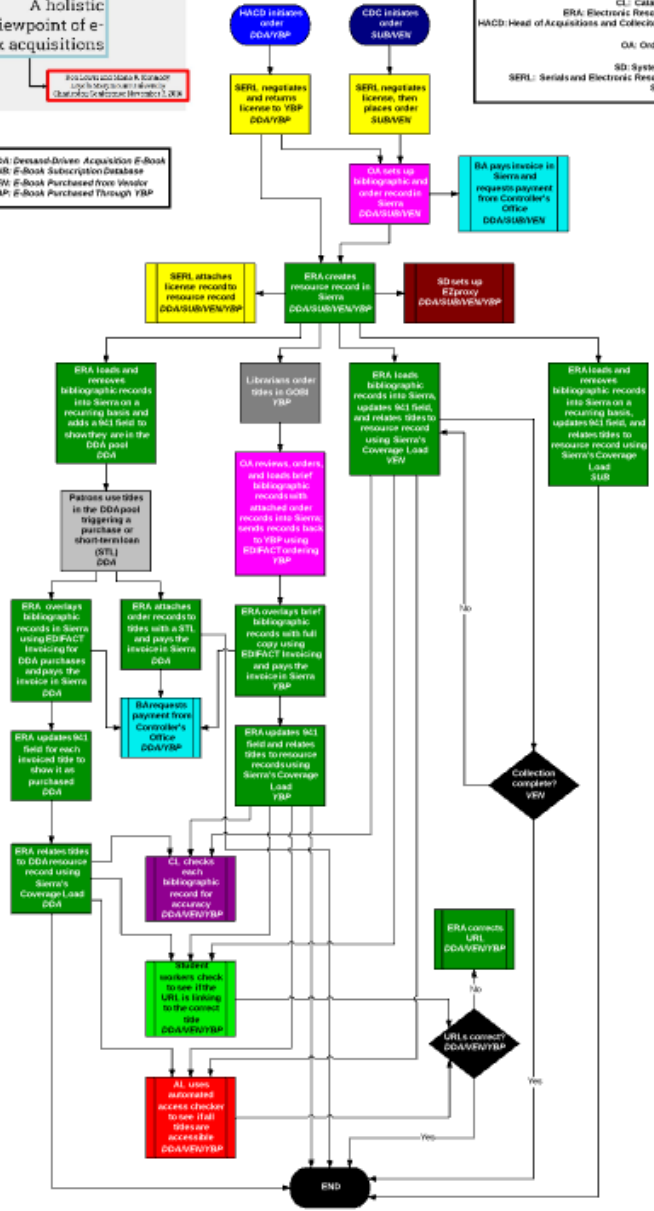


The Big Picture:
A holistic
viewpoint of e-
book acquisitions

For more details on e-Book
and e-Journal Acquisitions,
Check out the e-Book 101

DDA: Demand-Driven Acquisition E-Book
SUS: E-Book Subscription Database
VWV: E-Book Purchased from Vendor
YBP: E-Book Purchased Through YBP

The Players:
AL: Acquisitions Librarian
BA: Budget Analyst
CDC: Collection Development Committee
CL: Cataloging Librarian
ERR: Electronic Resources Assistant
HACD: Head of Acquisitions and Collection Development
Librarians
OA: Ordering Assistant
Patron
SD: Systems Department
SERL: Serials and Electronic Resources Librarian
Student system



DDA: Demand-Driven Acquisition E-Book
SUB: E-Book Subscription Database
VEN: E-Book Purchased from Vendor
YBP: E-Book Purchased Through YBP

The Players

AL: Acquisitions Librarian

BA: Budget Analyst

CDC: Collection Development Committee

CL: Cataloging Librarian

ERA: Electronic Resources Assistant

HACD: Head of Acquisitions and Colleciton Development

Librarians

OA: Ordering Assistant

Patrons

SD: Systems Department

SERL: Serials and Electronic Resources Librarian

Student workers

**HACD initiates
order
DDA/YBP**



**CDC initiates
order
SUB/VEN**

***DDA: Demand-Driven Acquisition E-Book
SUB: E-Book Subscription Database
VEN: E-Book Purchased from Vendor
YBP: E-Book Purchased Through YBP***

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Librarians

OA: Ordering Assistant

Patrons

SD: Systems Department

SERL: Serials and Electronic Resources Librarian

Student workers

What we learned

Things we still haven't figured out

Summary

thanks!

Any questions?

Stay in touch

RLEWIS@LMU.EDU

MARIE.KENNEDY@LMU.EDU

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Dean, William H. Hannon Library



Thanks!

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