ODIN Work Day 2012 March 28, 2012

Acquisitions/Serials Discussion

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Attendance:

TUTORIALS

Acquisition/Serials Module tutorials are available through the ODIN website at http://www.odin.nodak.edu/lib_staff. The academic community should use their ADM login to access the system. If you do not have a login account, please contact the ODIN office via their Help Desk Ticket at http://www.odin.nodak.edu/webticket.

After logging in, the tutorials are found under Library Staff - Training. Tutorials include the "Did You Know?" topic series, as well as training materials for each of the operating modules (Acquisitions, Serials, etc.) These include ODIN Created Files, Library Created Files, and Exlibris Notes and Guides.

CUSTOMIZING REPORTS

Selecting and De-selecting Fields

Reports may be customized to include more than the pre-selected default fields. Additional fields may be added IF they are listed in the report's xml. For example, a claims report does not include call numbers by default. The option to add them, however, is possible as the report's xml file includes the necessary coding for call numbers. The xml file may be accessed as follows: when in the Task Manager before opening the file you wish to view for information, change the Print Configuration in the bottom left to View Raw XML. Note the coding for the individual fields, and copy/paste or jot down the codes for those fields to be added to or deleted from the report. Notify the ODIN office via a Help Desk Ticket with the request. Be sure to note the report's name and number and the field codes being referenced.

Re-arranging the Order of Selected Fields

The order in which the fields are displayed in a report can also be customized by notifying the ODIN office. Indicate the report's name and number and desired field order when submitting a Help Desk Ticket.

Pulling Up Item Barcodes

A custom circ 77 report can be created utilizing order numbers to pull all corresponding barcodes connected to that specific order/title. This report also lists the barcode(s), sub library, collection, item status, open date, call number, title, and author.

Bulk Ordering

Version 20 includes an option to bulk order that can save you a bit of time, although it does not make the process entirely streamlined. Basically what it will save you is entering the budget, material type, material format, and clicking the send on each order.

The process would be:
Begin entering the order as per usual.
Input the brief bib record
Click 'Add' to add an order
VERY IMPORTANT – create a common Additional Order No. 1 for the set of records; you will use this later to filter the records.
Enter the sublibrary
Enter the acquisitions method
Enter the vendor
Enter the quantity and price
Click Add when finished
NOTE: It is possible to input these fields (all except price) and click Save Defaults. Once this is done, every order you add will contain the default values. When you're finished, remember to delete the fields and click Save Defaults again so future orders won't be auto populated with these values.
After the orders have all been added, go to the File Folder tab (tab 4) in the navigation pane. Here you are able to select the Bulk Ordering option in the left pane.
In the Bulk Ordering List, enter the Additional Order No.1 that was used in the orders into the IndexText field.
Click Refresh Filter. This should result in a list of all the orders you input.
Once the orders are pulled up on the screen, click Order All on the right side of the screen.
You're presented with a workform to fill out.
Enter the Vendor (even though we already entered it in the order record, it needs to be entered here as well)
Enter Material Type
Enter Material Format
Enter the Acquisitions Method (again, previously entered in the order record, but needs to be entered again)
Enter the number of units (again, previously entered in the order record, but needs to be entered again)
Select the budget you wish to encumber
NOTE: While it appears that you are also able to use this form to input vendor, acq method and number of units, it's a bit of a misnomer. You are unable to add an order record without these fields, so they must be entered in the prior step.
Click OK when finished.
You are presented with a total price – say Yes to continue.
Your budget is encumbered, and the orders are updated to Sent to Vendor.

While this 'bulk' order method isn't a huge time-saver, it does save a couple steps – such as entering the budget on each order and clicking Send on each order.

PATTERNS

Pattern options are sometimes limiting and can be challenging. Various scenarios were briefly discussed. Suggestions for troubleshooting may be found on Shelby's webpage at :http://webapp.und.edu/dept/library/Departments/abc/. Pattern problems may also be brought up on the list serv for potential suggestions.

EDI (Electronic Data Interchange)

The Chester Fritz Library at UND is currently using EDI with purchases from Yankee Book Peddler. The process was initiated two years ago and for the past nine months they have had good success with it. Overall, the process has saved them time with less typing and less errors. Beth Sorenson presented a report on the process which she has posted on the ODIN website http://www.odin.nodak.edu/ under Library Staff - ODIN Work Day - 2012. Please check it out.

Questions were also brought up regarding the use of YBP's bib records. The Chester Fritz Library is utilizing YBP's brief bibs, which include author, title, publisher, and publication year. They import in all caps and are easily recognized. There are tiers of charges based on the services received such as choice reviews, full bibs and brief bibs.

SUMMARY HOLDINGS

Summary holdings and the challenges were briefly discussed. Shelby has offered her webpage http://webapp.und.edu/dept/library/Departments/abc/SummaryHoldings.htm, as a resource for troubleshooting.

PATRON DRIVEN ACQUISITIONS

Discussion was held regarding various patron driven acquisition methods and the different levels of library mediation.

Library Mediated Acquisitions

Aleph tables can be set up which would enable patrons who have logged into Classic ODIN with the ability to request resources for ordering. These requests may be brought up in a report through the Acquisitions' Task Manager. Since the requests are submitted to the library, not the vendor, the library still maintains control over the acquisition process.

Vendor Downloads and "Dummy" Catalog Instances

Vendor downloads, which can be up to 25,000 records, may be imported into the library catalog enabling patron's to view and request. Various qualifiers may be set up to activate an order. For example, two patrons looking at the same title for a minimum of three minutes each may initiate an order. Libraries may set a dollar limit, however those funds may be used up rather quickly. This is a costly option and a healthy budget is necessary in order to maintain it.

A "dummy" instance of your catalog with these records may be created through the ODIN office and later filtered (keeping those ordered and deleting the oldest based on the criteria you set). Those titles actually ordered would show in the "real" instance of your catalog.

ILL Based Acquisitions

Purchasing items based on ILL activity was also discussed as a means of acquisitions. Various criteria may be set up for this patron driven, yet library mediated process.   For example, three ILL requests could initiate an order; however, libraries may use their own discretion and may implement the process on a title by title basis.