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

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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

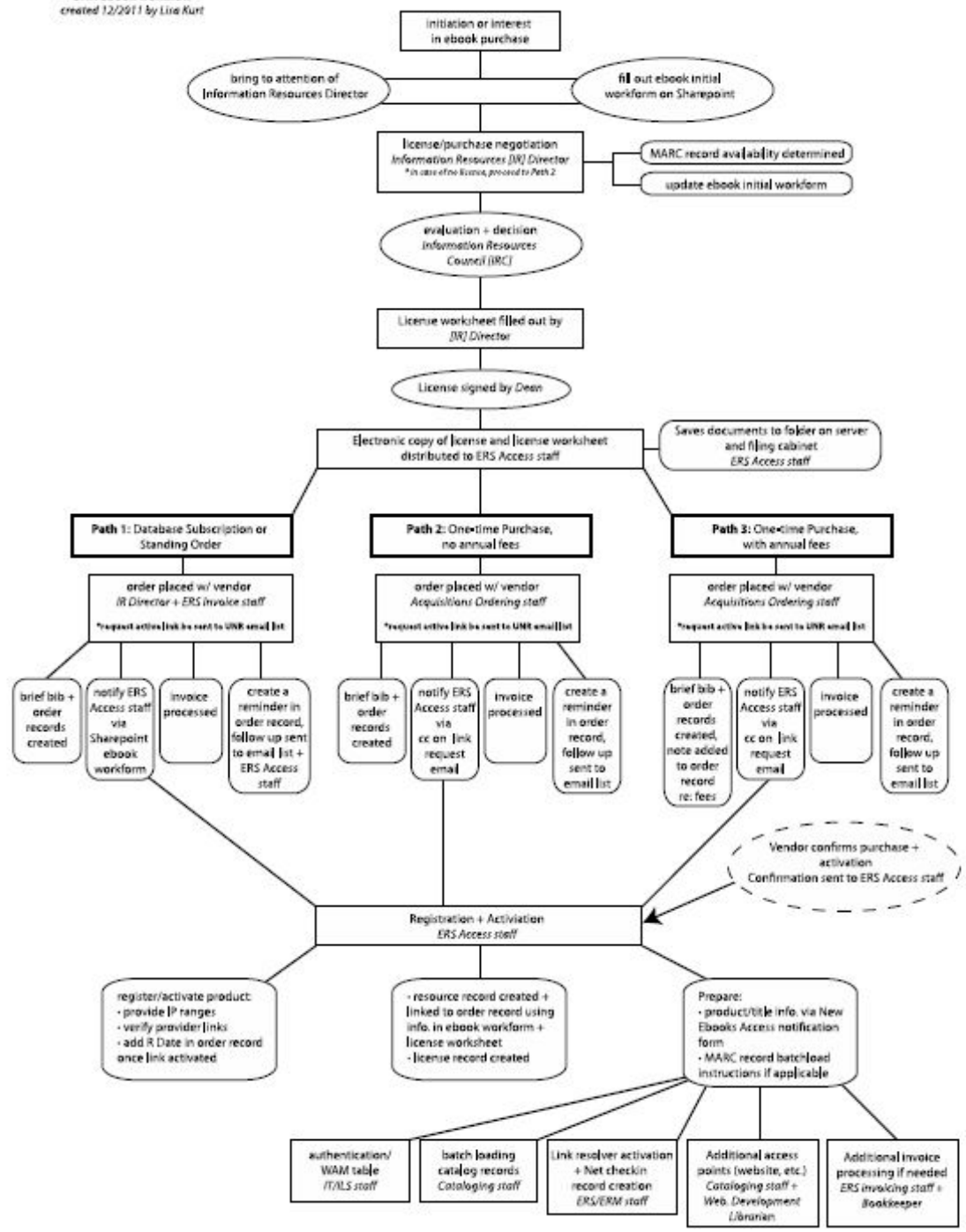
Our inspiration



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.



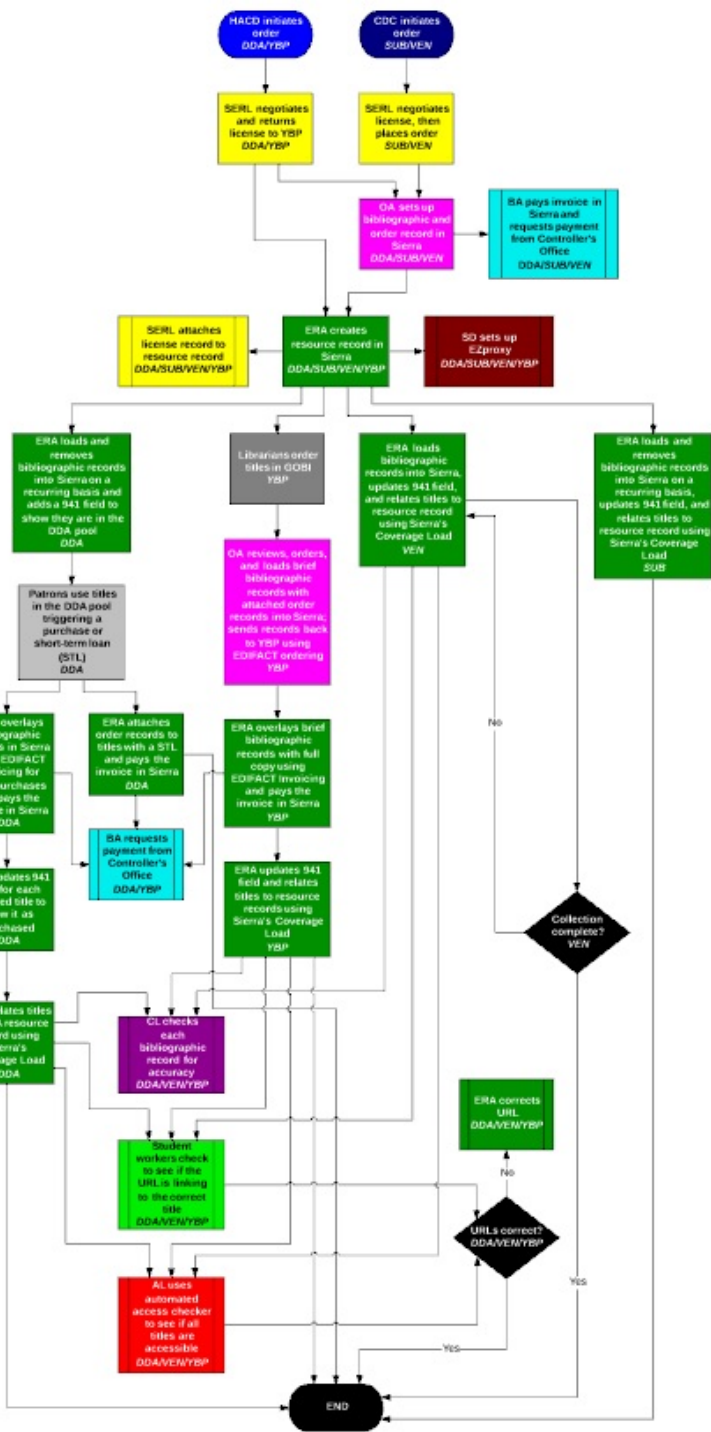
dadaamn

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

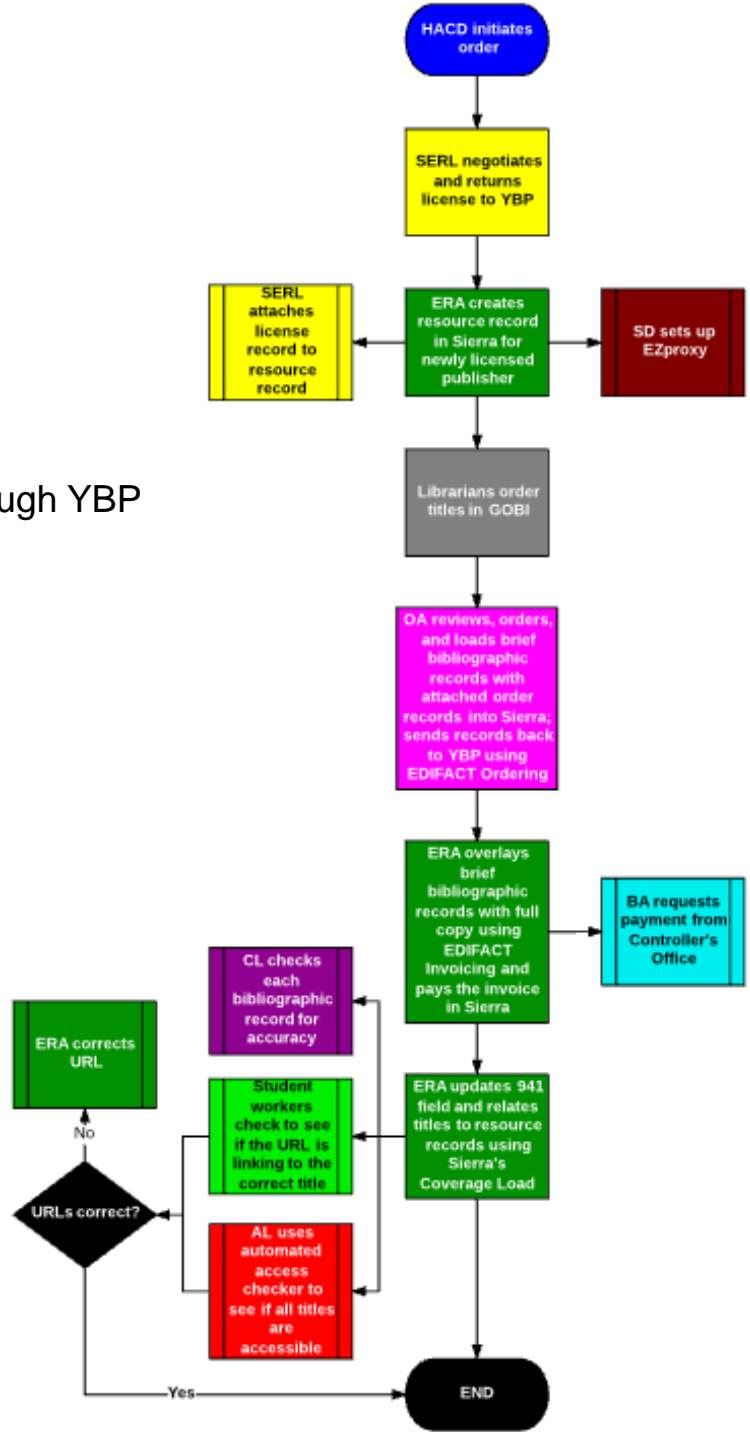


Oxford Scholarship Online

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

see notes by 10 min. User's message

Library accessions | Librarian | Librarian or Registrar | Librarian or Registrar | Catalogue administrator | eBook resource | Registrar | Catalogue administrator

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

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

Prerequisites

- Creating Catalogue

Target jobs

- To create pending and ordered processing, the Creating Catalogue will monitor order submissions for each of the populated Submissions in GOBI at regular intervals.
- A workflow is set by the Catalogue Development Librarian to push orders through to a custom date and time outside of the regular interval.

Responsy

- Weekly, usually on Friday

Ordering/Job/Job Backup Job backup will only perform this procedure if the Ordering job is in a position to run for more than a week.

- Electronic Resources Librarian
- Cataloguers Librarian

Process Map

Ordering/Job/Job

1. Under the Search bar at the top click **Selected**

GOBI® Keyword: [Any Words]

Content: Spotlight Lists | **Selected** | Notifications | Folders | Reports | Options

Content	Search	Saved Searches
News	Add Titles by ISBN	
	Advanced	
	Alternate Formats	
	Consistent Titles	
New Products and Services	Library Activity	
	Library OCA Sent	
	Manage Saved Searches	
	Peer Comparison Titles	
eBook Services	Recommendations (GobiAlerts)	
	Orders	
	Open	
Webinars	Standard	
	Search Approvals	
	Book/Unbook Titles	
	Excluded Titles	
Tutorials	Search Continuations	
	Library Continuations	
Publisher Lists, New Titles	Titles and Price Orders	
	Volumes Shipped	
GOBI Tips	Search eCollections	
	eCollections	
	eCollection Activity	

2. If there are orders to input, you will see **GOBI-CO LIB RECORDS** listed under **Submissions**, highlight this **Submission** and click **Search**

GOBI® Keyword: [Any Words]

Search Results: 0 Records Found

Submissions: 11 | GOBI-CO LIB RECORDS

Search Criteria: [x] Clear Search | [x] Advance Parameters | **Search**

Search Identifiers: 11
 11. Search Identifiers: 11
 11. Search Identifiers: 11
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 11. Search Identifiers: 11
 11. Search Identifiers: 11

11. Search Identifiers: 11
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 11. Search Identifiers: 11
 11. Search Identifiers: 11
 11. Search Identifiers: 11

3. Each selected title must be reviewed for accuracy and to present any outstanding items to review include

1. Make sure that the **Submission** (GOBI-CO) is paired with its corresponding **Vendor Code** (GCR)
2. Make sure the **Title title**, **Submission**, and **Vendor Code** (must always end with '001') titles are entered properly
3. Make sure the **Supplier and Service Order** titles are entered. See [Priority Ranking](#) button for appropriate suggestions/purchase options.
4. Check the notes in the column on the far right. Instructions of digital order titles can be found in this column, such as **Already Owned by Library**, **Not Billed**, **Preparing to Bill**, **Not Billed**, or **Library Open Order**. If any of the titles can be reviewed as "Where is a title that says "Library code(GOI) record sent", and the title in Green using the GOBI. If the title is "found and contents" GOBI (Library/GOBI/GOBI) (see [Priority Ranking](#) button for authority on "GOBI processing") in the GOBI/GOBI task, you may notice that the title must be removed from the GOBI. If you are not purchasing a copy, ensure the records are attached to the title.
5. To make any corrections, click the **book** 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 Dates** button, click **Mark as Cart**, and click **Save** Cart from the drop down.
7. Go to the **Report** 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 **Report** **Green Light**.
9. A confirmation email will be sent to your email, which should be filed in the YBP feed/Email/Save folder in the J-GOBI email account. M/G/GOBI records should not be available for input in **Order** or **Data Exchange**.

See procedure [Ordering - eBooks - Building the Report File and Queuing Orders](#), but, make sure to use the last title **Vendor Code** (GCR) instead.

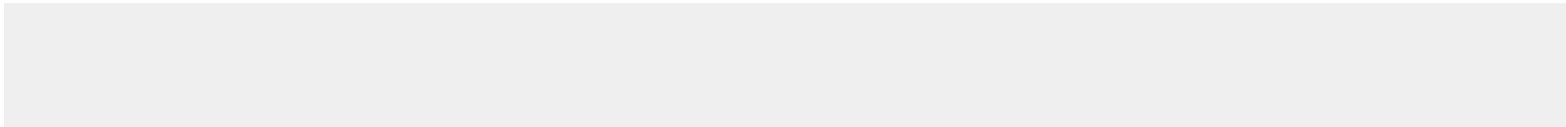
Priority Ranking for Basic Functions/Purchase Orders

If there are only need to configure simultaneous access, if available:

1. Library 3.0 L/P
2. B&B/COB/ / User

If there are need multiple simultaneous user access (not to be the only option):

1. Library 3.0 L/P
2. B&B / 3 User or B&B Team/Team Licensing (if available is changed)
3. B&B/COB / 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.

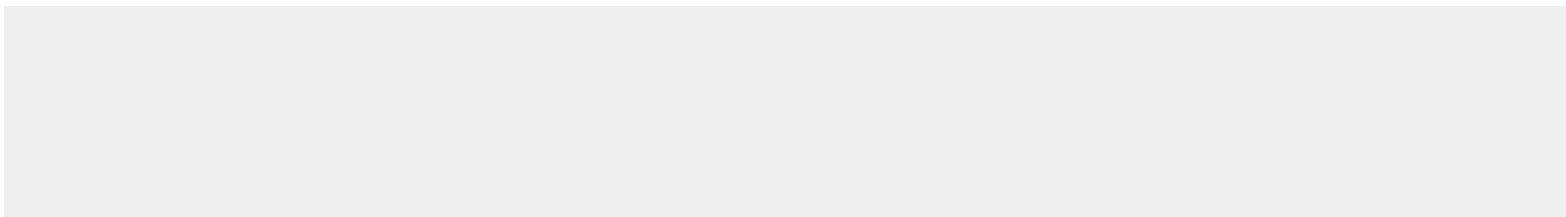
Frequency:

- 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 currently set to 'All', and the option '8006-40 US EBOOK ORDERS' is highlighted with a red box. On the right, the 'eBook' section has a checkbox for 'Only show downloadable items', 'Selections' with radio buttons for 'Include' (selected), 'Exclude', and 'eBook only', and a 'Supplier' dropdown menu with options: '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)SUPO(sDDApool(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

 [Bookmark link for this record](#)

Authorized Users	Faculty, Staff, Students, Walk-in users (Westchester campus, LLS campus)
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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E-Resource

Resource Home: [ebrary](#)

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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/](#)

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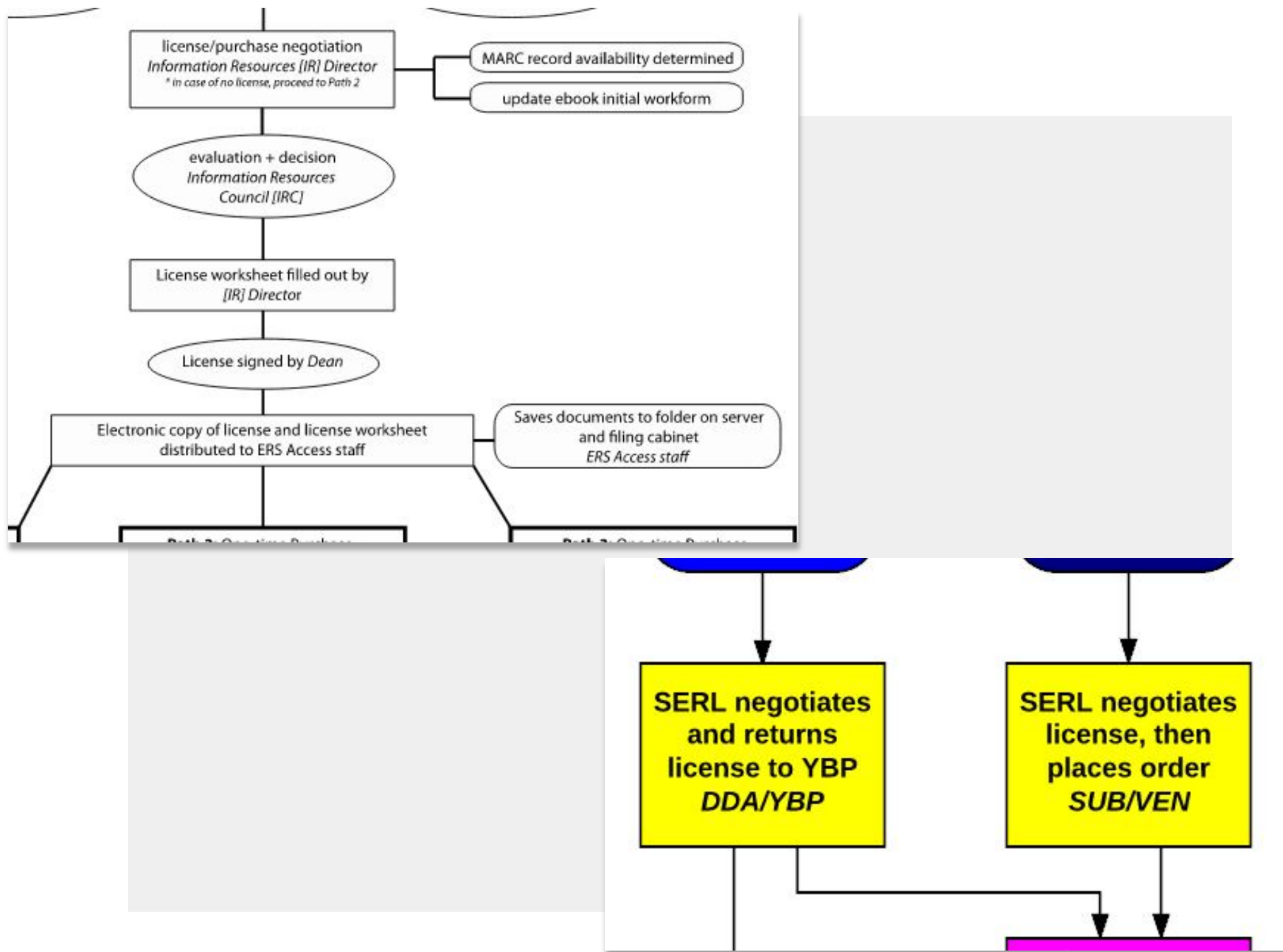
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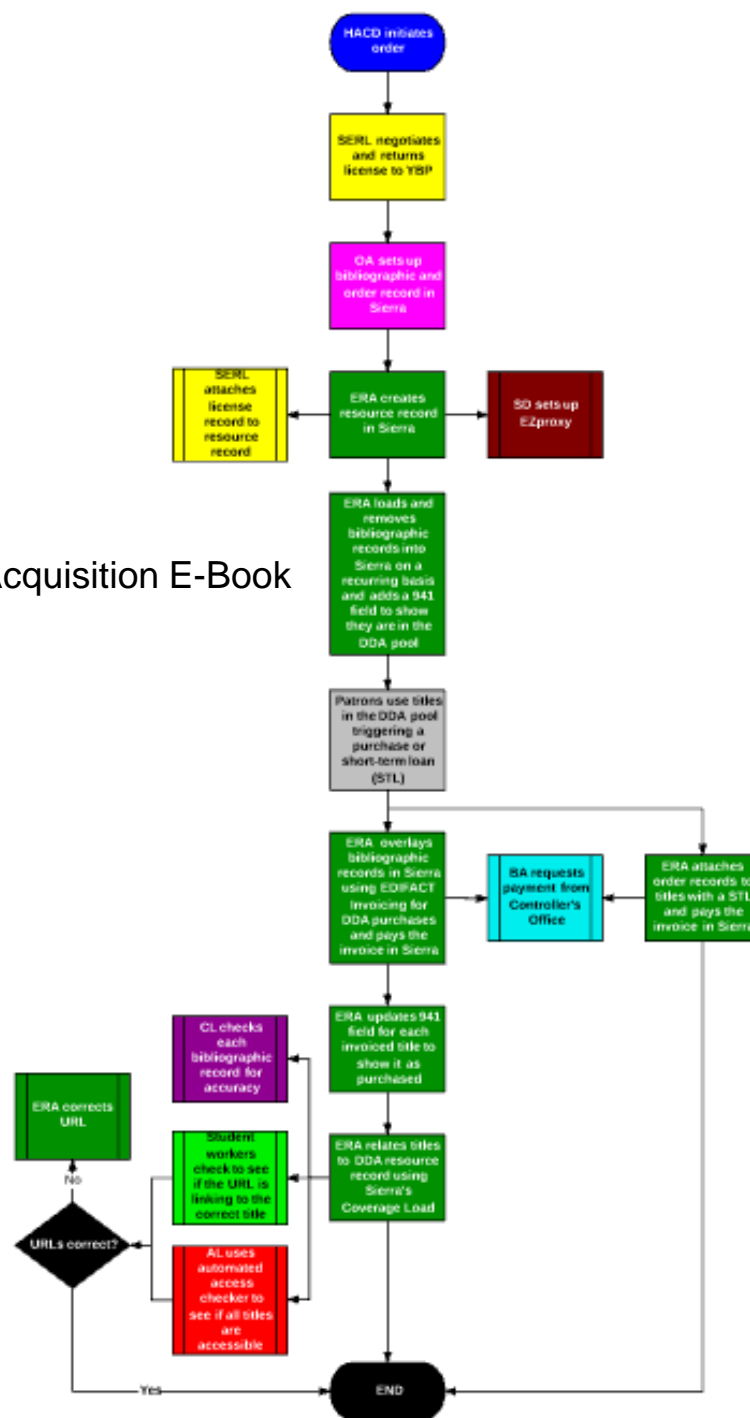
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BRILL



Springer

The
Cambridge
Histories

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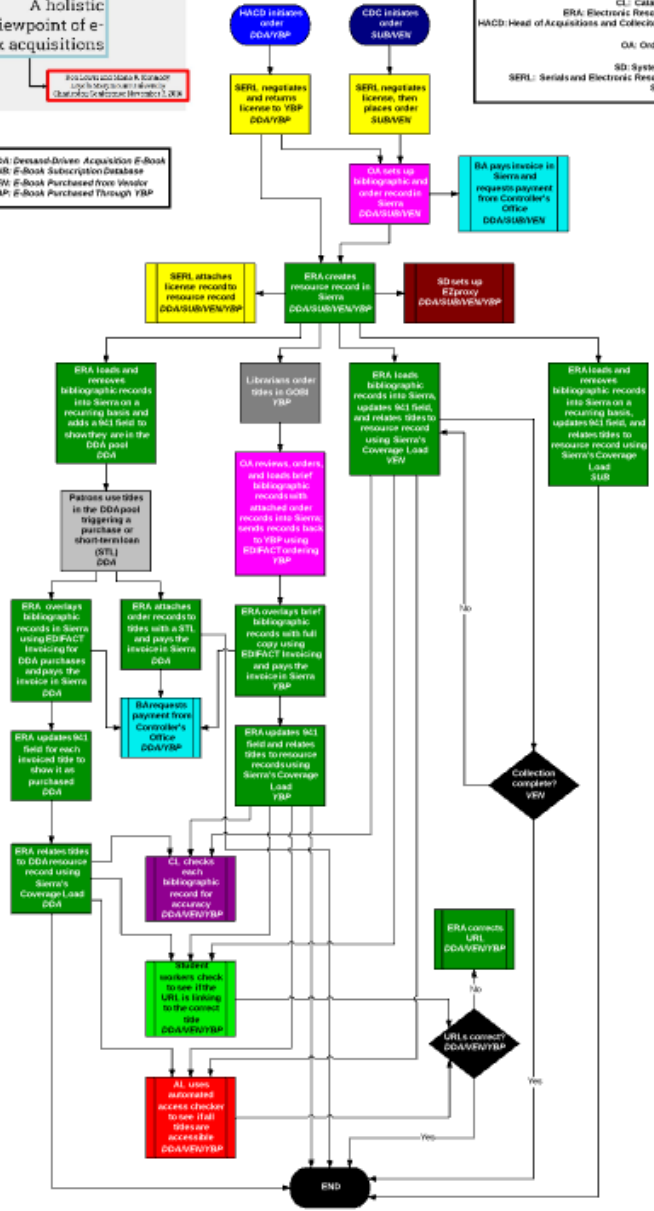


The Big Picture:
A holistic
viewpoint of e-
book acquisitions

For more details on e-Book
and e-Journal acquisition,
check out the e-Book
and e-Journal Librarian's
Checklist

DDA: Demand-Driven Acquisition E-Book
SUB: E-Book Subscription Database
VW: 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
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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
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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



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