Using Selection List Wizards for Collection Development

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Before beginning

• In the selection screen, take a moment to set the properties of the wizards
Selection Tab,
Create Selection list wizard

• Properties
• Right click Add Selection list

• First tab: - Behaviors
  • Auto-generate list ID
  • Prompt for Requestor
  • Quantity Matching
  • ISXN warnings

• Title lookup options
  Temp Title
  SmartPort
Help Files

• About Selection List
• Selection List Wizard
• Toolbar
• Selection List Wizards Properties
• Working with Selection Lists
• FAQs
• Selection List Fields
• Selection List Tabs

Acquisitions selection lists aid librarians in making informed decisions for acquiring new and replacement titles for collection development. Selection lists include title information, review information, and ordering information, such as price, quantity, funding, and distribution.

Selection List Structure

Selection information is stored in the following types of records:

- Selection list control record
- List items
- Decisions
- Selection list extended information
- List line extended information
- Decision extended information

Selection List Control Record – The selection list control record stores information that describes a selection list, such as ID, name, date created, created by, list status, and more. The selection list control record is typically linked to many list lines.
Add Temp Title - Behavior

• Add call number
• Auto generate
• Add item (for holds)
Add Temp Title - Defaults

- Default material type
- Default location
- Shadow title if desired
Selection Tab, Create Selection list wizard

- Second Tab – Defaults
- Item lookup prefs
- Selection List
- Line entry
- Decision info

- Decision Defaults can be helpful, such as setting the default to main location, and if you are a subject specialist, your selector ID and Fund ID
Selection Tab, Create Selection list wizard

- Third Tab – Helpers
- Only helper is display bibliography with its own set of defaults
Add Selection List

- I prefer to let the ID be auto-generated
Add to Selection List

• Adding to the list is the process of creating it
• You can add temporary titles
• If you have permissions and are set up properly, you can smartport records

• If you are requesting a duplicate or replacement, the item should already be in the catalog....
Title and call number are the only required fields.

Call number can be auto-generated.

ISBN can be added if known which can be helpful.
I shadow the request, but there is a setting when you order to automatically unshadow it so people know the item is on order via iLink.

I leave call number and class scheme to auto.
List Line info

• Add Price
• Add requestor
• Add notes, etc.
Decisions Tab

• Click the Lightbulb to add decision
• This need not be done when the request is generated...
• This can be left for a review and approval process
Add Decision

- Buy, Don’t Buy, Maybe
- Qty
- Fund
- Holding Code
- These can be set as defaults
After adding a decision

- The decision can be modified or deleted
A list with multiple lines

- Each line can be edited, and reviews
- Once the line is being edited, the decisions can be edited
Selection List tab

- Extra information can be added in this tab
- Cutoff dates and alerts are for collaborative list building
Selection List Status

• Building – can add titles, not decisions
• Active – can add decisions and titles
• Inactive – freezes list
• Ordered – requests have been converted
• Ready – list has been reviewed and approved to be ordered
• Review – decisions only can be modified, no orders can be created
Order from Selection Line

- There are options to review each line or to order all lines with buy decisions
Order from Selection List

• This wizard turns each request with a decision to BUY into an orderline
Creating the orderline

- This should look familiar as this is the same as creating a regular order
Creating the orderline

• Including editing the segments
Submit orders via normal means

• By printing your ready purchase orders, you convey the order to the vendor
• This could also be an X12 process, but that would depend on your match parameters
Helpful reports

- List Decisions
- List Decision List Distributions
- List Decision List Funding Segments
- List Selection List Lines
- Notice to Selectors
- Remove lists / lines
Notice to Selectors

• This keeps the selectors informed and involved
Notice to Requestors

• Sometime the requestor ID is from a suggestion outside the library

• This report in the acquisitions tab notifies patrons that a request or suggestion has been turned into an order

• Running it with different parameters notifies them when the material is available
Load bibs for Selection List

• List available from Vendors
• You can create a list, and have your selectors add decisions
Review of Process

- Selection List is Created
- Decisions are added
- Decisions are reviewed
- Selections become orders
Implementation of Selection Lists at ULM

- Origins of project
- Stakeholders
- Process
- Evaluation
- Future
How we started down this path ...

- Shortcomings of ULM selection/order process for collection development
- Possible solution: using the Selection Wizards and Reports
Anticipated *extras*:

- Mechanism for creating and maintaining record of selection decision(s)
- Provides *shared* access to selection requests and decisions
- System-generated notices
- Convenient desiderata lists
Selection Wizards can stand alone

But considering the Selection process encouraged implementation of Acquisitions module

- The Acquisitions librarian and the Dean had been wanting to do this for a long time
Stakeholders: different parts of the pie

- Selectors
- Acquisitions
- Technical services
- Dean of the Library
- Systems staff
- Faculty requestors
Process

- Researching ...
- Learning ...
- Setting up ...
- Testing ...
- Educating ...
- Negotiating ...
- Working with ...
Evaluation

- So far, so good
- *Great staff!*
- Relatively simple processes
- Seems to mean *different* work tasks, not more
- Time will tell...
Where do we go from here?

- Fully implement Acquisitions, with Selection
- Policies and procedures to be worked out to maximize benefits for \textit{all} departments
- Fine tune as we all learn capabilities and limitations
Questions?

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Thank you for coming