9-16-2005

Hogging the Remote (search button): How Western Libraries is Using Remote Searching to Streamline Acquisitions

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Hogging the Remote (search button)

How Western Libraries is Using Remote Searching to Streamline Acquisitions

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Director, Library Technical Services
karen.marshall@uwo.ca
Who are we?

• One of Canada’s oldest universities
• Acquisitions Budget - $11.4 million CDN
• 33,000 Undergraduate and graduate students
What are we going to show you?

- Manual ACQ process
- First Steps
- Remote Searching
Result of Manual Acquisitions Process:

Author: Gorman, Michael
Title: Managing Change: A How-To-Do-It Manual for Librarians.
Edition: Revised Edition
Imprint: Neal Schuman Publishing, 2005

1 copy ordered for None on 2006-07-20

STD #: 1555705537
Manual Acquisitions Process
First Steps

- Know your vendor!
  - We benefit from a strong relationship with Coutts Information Services

- Coutts offered complete MARC records from their database
First Steps

• Used Coutts’ OASIS Database to retrieve bib. records only

• Implemented Millennium Data Exchange – allowed desktop loading of files
First Steps

• Created Coutts-specific item and order templates
• Load profile training – enabled us to construct a Coutts-specific table which pointed to those templates
• Coutts’ OASIS Database. . .
### Bibsource Search Form

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Word</td>
<td></td>
<td>Search by keyword.</td>
</tr>
<tr>
<td>Title</td>
<td>Event</td>
<td>Filter by event.</td>
</tr>
<tr>
<td>Author</td>
<td></td>
<td>Search by author.</td>
</tr>
<tr>
<td>Publisher</td>
<td></td>
<td>Search by publisher.</td>
</tr>
<tr>
<td>Readership Level</td>
<td>--No Filter--</td>
<td>Filter by readership level.</td>
</tr>
<tr>
<td>Subjects</td>
<td>--No Filter--</td>
<td>Filter by subject.</td>
</tr>
<tr>
<td>Format</td>
<td>--No Filter--</td>
<td>Filter by format.</td>
</tr>
<tr>
<td>Name Your Search</td>
<td></td>
<td>Customize search.</td>
</tr>
<tr>
<td>Saved Searches</td>
<td>New Search</td>
<td>Save or create new search.</td>
</tr>
</tbody>
</table>

**Search Options:**
- **Search**
- **Quick Search**

**Confirmation:**
- **Confirm**
- **Cancel**
• May enter up to 200 ISBNs in this box
### Bibsource Search

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Filter Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Author</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publisher</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Readership Level</td>
<td>--No Filter--</td>
<td></td>
</tr>
<tr>
<td>Subjects</td>
<td>--No Filter--</td>
<td></td>
</tr>
<tr>
<td>Format</td>
<td>--No Filter--</td>
<td></td>
</tr>
<tr>
<td>ISEN</td>
<td>0224051873.07432506</td>
<td></td>
</tr>
<tr>
<td>Courts Control No.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Publication Year</td>
<td></td>
<td>--No Filter--</td>
</tr>
<tr>
<td>Publication Month</td>
<td></td>
<td>--No Filter--</td>
</tr>
</tbody>
</table>

### Saved Searches

- New Search

#### Search buttons
- Search
- Clear
Click here to place an original order.


Summary
0 0

Price: 40.00 USD
Quantity: 0
Payment Type: On Account
Rush: Phone Rush (Requires additional fee)


**Summary**: 0 0 0
<table>
<thead>
<tr>
<th>Title</th>
<th>Fund</th>
<th>CAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thorpe, Adam, 1956: The rules of perspective / Adam Thorpe. London, UK: Jonathan Cape, 2005. 340 p.; 23 cm. ISBN: 0-224-05187-3 (Cloth/HB 34.95 CAD)</td>
<td>0</td>
<td>0.00</td>
</tr>
</tbody>
</table>

Summary: 152.37
<table>
<thead>
<tr>
<th>Title</th>
<th>Fund</th>
<th>CAD</th>
<th>NPA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abbi, Anneli. EU enlargement and the constitutions of Central and Eastern Europe / Anneli Abbi. ISBN 0-521-60738-1 (Paperback 37.99 USD)</td>
<td>1</td>
<td>NPA</td>
<td></td>
</tr>
<tr>
<td>Axelrod, Mark. Character and Cameron's five: the personal history of a man who lived in eight nations / Mark Axelrod. ISBN 0-333-325-00667-7</td>
<td>1</td>
<td>NPA</td>
<td></td>
</tr>
<tr>
<td>Macmillan, F. New directions in European studies / F. Macmillan. ISBN 0-100-100.00 USD</td>
<td>1</td>
<td>NPA</td>
<td></td>
</tr>
<tr>
<td>Mezey, Susan Glück. Disabili / Susan Glück. ISBN: 0-8229-5869-1</td>
<td>1</td>
<td>NPA</td>
<td></td>
</tr>
</tbody>
</table>
Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: coults
File type: 
From: www.mycoults.com

Would you like to open the file or save it to your computer?

- Open
- Save
- Cancel
- More Info

- Always ask before opening this type of file
## Data Exchange

**Select Process**: Load COUTTS MARC records (coutts)

<table>
<thead>
<tr>
<th>File</th>
<th>Name</th>
<th>Type</th>
<th>Size</th>
<th>Last Modified</th>
</tr>
</thead>
</table>

This page is from Millennium Acquisitions at the University of Western Ontario.
## Data Exchange

**Select Process**: Load COUTTS MARC records (coutts)

**PREPROCESS records loaded via FTS**

<table>
<thead>
<tr>
<th>File</th>
<th>Name</th>
<th>Type</th>
<th>Size</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>coutts.bfts</td>
<td>bfts</td>
<td>3126</td>
<td>2005-09-13 12:43PM</td>
</tr>
</tbody>
</table>
Data Exchange

Process: Load COUTTS MARC records
Function: PREPROCESS records loaded via FTS
Input File: coutts.bfts (3,126 bytes)
Output File: /iiidb/marc/couuts.marc

Output Messages

Start
Data Exchange

Process: Load COUTTS MARC records
Function: PREPROCESS records loaded via FTS
Input File: coutts.bfts (3,126 bytes)
Output File: /iiidb/marc/coutts.marc

Output Messages:
1:inoff 0:leng 468:outoff 256
2:inoff 468:leng 641:outoff 768
3:inoff 1109:leng 977:outoff 1536
4:inoff 2086:leng 1040:outoff 2560
NUMBER OF INPUT RECORDS - 4
NUMBER OF OUTPUT RECORDS - 4
## Data Exchange

### Load COUTTS MARC records (coutts)

<table>
<thead>
<tr>
<th>File</th>
<th>Name</th>
<th>Type</th>
<th>Size</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>coutts.bfts</td>
<td>bfts</td>
<td>3126</td>
<td>2005-09-13 12:43PM</td>
</tr>
<tr>
<td>2</td>
<td>coutts.marc</td>
<td>marc</td>
<td>3840</td>
<td>2005-09-13 12:44PM</td>
</tr>
</tbody>
</table>
Data Exchange

Process: Load COUTTS MARC records
Function: LOAD a MARC file
Input File: coutts.marc (3,840 bytes)
Start Block: 1
Stop Block: 14
Maximum Records to Load: 1000000

Output Messages

Test  Load
### Data Exchange

**Select Process**
- View a File

**Load COUTTS MARC records (coutts)**

<table>
<thead>
<tr>
<th>File</th>
<th>Name</th>
<th>Type</th>
<th>Size</th>
<th>Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>coutts.bfts</td>
<td>bfts</td>
<td>3126</td>
<td>2005-09-13 12:43PM</td>
</tr>
<tr>
<td>2</td>
<td>coutts.errlog</td>
<td>errlog</td>
<td>1513</td>
<td>2005-09-13 12:49PM</td>
</tr>
<tr>
<td>3</td>
<td>coutts.marc</td>
<td>marc</td>
<td>3840</td>
<td>2005-09-13 12:49PM</td>
</tr>
</tbody>
</table>
## Data Exchange

File Name: coutts.errlog (1,513 bytes)

### Errors

**RECORD LOADING STATISTICS**

<table>
<thead>
<tr>
<th>Input file</th>
<th>Start date</th>
</tr>
</thead>
<tbody>
<tr>
<td>coutts.marc</td>
<td>September 13 12:49PM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Error file</th>
<th>End date</th>
</tr>
</thead>
<tbody>
<tr>
<td>coutts.errlog</td>
<td>September 13 12:49PM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>m2btab file</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>m2btab.coutts3</td>
<td></td>
</tr>
</tbody>
</table>

**Number of input records** - 4

**Number of linked order records** - 4

**Number of errors** - 0

<table>
<thead>
<tr>
<th></th>
<th>NEW</th>
<th>EXISTING</th>
<th>INPUT</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>RECORDS</td>
<td>REC #S</td>
<td>ASSIGNED</td>
<td>RECORDS</td>
</tr>
<tr>
<td></td>
<td>CREATED</td>
<td>START</td>
<td>STOP</td>
<td>OVERLAYED</td>
</tr>
<tr>
<td>BIBLIOGRAPHIC</td>
<td>4</td>
<td>b37345187</td>
<td>b37345217</td>
<td>0</td>
</tr>
<tr>
<td>ORDER</td>
<td>4</td>
<td>o3805633</td>
<td>o3805669</td>
<td>0</td>
</tr>
<tr>
<td>ITEM</td>
<td>4</td>
<td>i51650587</td>
<td>i51650617</td>
<td>0</td>
</tr>
</tbody>
</table>
AUTHOR: Gersmehl, Philip.
TITLE: Teaching geography / Phil Gersmehl.
CALL #: G73.G47 2005

LOCATIONS: zzzzz

Last Updated: 2005-09-13  Created: 2005-09-13  Revisions: 1

- ACQ TYPE: PURCHASE
- E PRICE: $47.04
- RLOC: ACQUISITIONS
- LOCATION: none
- FORM: BOOK
- BLOC: ACQUISITIONS
- CDATE: - -
- FUND: ebanf Education Firm A
- STATUS: ON HOLD
- CLAIM: - ---
- ODATE: 2005-09-13
- TLOC: - ---
- COPIES: 1
- ORD NOTE: VENDOR: coult COUTTS INFORMATION SERVICE
- CODE1: - ---
- ORD TYPE: MONOGRAPH
- LANG: eng English
- CODE2: RACTION: - ---
- COUNTRY:
- CODE3: RDATE: - -
- VOLUMES: 1
- CODE4:

Summary Record o3805669 Receive o3805669 Payments o3805669 O Bib-Level Holds
Author: Franklin, Margaret Ann.
Title: Boccaccio's heroines: power and virtue in Renaissance society / Margaret Franklin.
Publisher: Aldershot, UK; Burlington, VT: Ashgate, c2006.

1 copy ordered for DBW stack on 2006-06-14.

Description: 265 p.: ill.; 23 cm.
Series: Women and gender in the early modern world
Note: Includes bibliographical references (p. [177]-199) and index.
Subject: Boccaccio, Giovanni, 1313-1375. De mulieribus claris
Women -- Biography
Women in literature
Women -- History -- Renaissance, 1450-1600

ISBN: 0754653641 (Cloth)
First Steps - Summary

• 1 staff member now handles workload previously managed by 3 staff

• Reduced turn-around from 4 days to 1

• Required either:
  – Load profile training - $$$; or
  – Innovative to create a new load table - $$$; or
  – Innovative to edit an existing load table - $$$
First Steps - Summary

- Eliminated manual creation of our records (bib., order, and item)
- Full bib. records visible to patrons at time of ordering
- Improved record quality and accessibility
Remote Searching

• Meeting with Coutts staff (Nov. 2004)
  – Suggestion that a Z39.50-compliant OASIS database would help streamline our process even more

• By April, 2005 OASIS was Z39.50-compliant
Remote Searching

- Doesn’t require Load Profile Training
- Doesn’t require accessing the Coutts’ OASIS database to download records
- Doesn’t require uploading files using Millennium Data Exchange
Remote Searching

- Set our New Records “Settings” tab as follows. . .
### Options for Order View

- [ ] Show Selection List

### Options For New Item Records

- [ ] Prompt for Multiple Items

### Options For New Checkin Records

- [ ] Create checkin card when creating holdings record

### Options For New Order Records

- [ ] Don’t ask these questions when creating new order records
  - [ ] Use Today’s Date as Order Date?
  - [x] Use Today’s Date as Received Date?
  - [x] Queue Purchase Orders for records?

### New Record Templates

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bibliographic</td>
<td>appro, approval, monograph, LMC</td>
</tr>
<tr>
<td>Order</td>
<td>Coutt Order</td>
</tr>
<tr>
<td>Checkin</td>
<td>Coutt Coutts Template</td>
</tr>
<tr>
<td>Authority</td>
<td>Prompt for template</td>
</tr>
<tr>
<td>Item</td>
<td>Prompt for template</td>
</tr>
<tr>
<td>Patron</td>
<td>Prompt for template</td>
</tr>
<tr>
<td>Course</td>
<td>Prompt for template</td>
</tr>
<tr>
<td>Resource</td>
<td>Prompt for template</td>
</tr>
<tr>
<td>License</td>
<td>Prompt for template</td>
</tr>
<tr>
<td>Contact</td>
<td>Prompt for template</td>
</tr>
<tr>
<td>Vendor</td>
<td>Prompt for template</td>
</tr>
</tbody>
</table>

**Records to attach to new bibliographic record:**
- [x] Item
- [x] Order
- [ ] Checkin

[Save Settings] [OK] [Cancel]
2006

Canadian Library Association / 3M Canada Award

For Achievement in Technical Services

Awarded to

Library Technical Services
Staff at University of Western Ontario

To recognize achievement in technical services in order to encourage innovation and raise the profile of technical services

Generously Sponsored by the Technical Services Interest Group of CLA and 3M Canada
Summary – Remote Searching

- Entire process is run from within Millennium
- Further increases staff productivity
- Automatically identifies duplicates
- Reduces number of clicks and the risk of RSIs
- Load Profile Training not necessary
Thank you for attending our session.

Paul Hamilton
Integrated Library Sys. Administrator
phamilto@uwo.ca

Karen Marshall
Director, Library Technical Services
karen.marshall@uwo.ca
We receive full bib records from Coutts
The title duplication key is formed from the first letter of each of the first seven words of the normalized form of the field. If the field does not contain seven words, the key is padded with letters from the last word. If there are not enough letters in the last word, asterisks are used to complete the key.
AUTHOR Cunningham, Michael, 1952-
TITLE Specimen days / Michael Cunningham.
LOCATIONS zzzzz
AUTHOR  Cunningham, Michael, 1952-  
TITLE   Specimen days / Michael Cunningham.  
LOCATIONS  zzzzz
<table>
<thead>
<tr>
<th>#</th>
<th>ISBN</th>
<th>Local</th>
<th>Alt-O</th>
<th>ORIGIN</th>
<th># ENTRIES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0374299625</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
AUTHOR Cunningham, Michael, 1952-
TITLE Specimen days / Michael Cunningham.

LOCATIONS zzzzz

Summary Record i51654660 0 Item-Level Holds 0 Bib-Level Holds

View all All

1 03806790 LOCATION:wstkg FUND:dengf STATUS:o
2 i51654660 BARCODE: VOLUME:
**Author**: Cunningham, Michael, 1952-

**Title**: Specimen days / Michael Cunningham.

**Locations**: zzzzz

**Summary**

- **Record i51654660**
- **0 Item-Level Holds**
- **0 Bib-Level Holds**

**i51654660**

- **Last Updated**: 2005-09-14
- **Created**: 2005-09-14
- **Revisions**: 1

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
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<td>COPY #</td>
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</tr>
<tr>
<td>ICODE1</td>
<td>0</td>
</tr>
<tr>
<td>ICODE2</td>
<td>a SUPPRESS</td>
</tr>
<tr>
<td>I TYPE</td>
<td>0 General Loan</td>
</tr>
<tr>
<td>PRICE</td>
<td>$0.00</td>
</tr>
<tr>
<td>OUT DATE</td>
<td>- - :</td>
</tr>
<tr>
<td>OUT LOC</td>
<td>0</td>
</tr>
<tr>
<td>DUE DATE</td>
<td>- -</td>
</tr>
<tr>
<td>PATRON#</td>
<td>0</td>
</tr>
<tr>
<td>LPATRON</td>
<td>0</td>
</tr>
<tr>
<td>LCHKIN</td>
<td>- - :</td>
</tr>
<tr>
<td>LOUTDATE</td>
<td>- - :</td>
</tr>
<tr>
<td>LOCATION</td>
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<tr>
<td># RENEWALS</td>
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<td># OVERDUE</td>
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<td>ODUE DATE</td>
<td>- -</td>
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<tr>
<td>IUSE3</td>
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</tr>
<tr>
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<td>- -</td>
</tr>
<tr>
<td>TOT CHKOUT</td>
<td>0</td>
</tr>
<tr>
<td>TOT RENEW</td>
<td>0</td>
</tr>
<tr>
<td>INTL USE</td>
<td>0</td>
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<tr>
<td>STATUS</td>
<td>p IN PROCESS</td>
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<tr>
<td>IMESSAGE</td>
<td></td>
</tr>
<tr>
<td>YTD CIRC</td>
<td>0</td>
</tr>
<tr>
<td>2YRCIRC</td>
<td>0</td>
</tr>
</tbody>
</table>

**In cataloguing**

**i51654660** Not checked out and IN PROCESS
WebOPAC Display

Author: Cunningham, Michael, 1952-
Title: Specimen days / Michael Cunningham.

1 copy ordered for DBW stack on 2005-09-14.

Description: x, 308 p. ; 24 cm.
Subject: New York (N.Y.) -- Fiction.
ISBN: 0374299625 (Cloth)
LCCN: 2005040618