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Acquiring Minds Want to Know: Acquisitions and New Technology

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No Abstract

Acquiring Minds Want to Know

Acquisitions and New Technology
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Acquisitions as a function faces two major challenges. One is the general lack of an automated system that manages complicated acquisitions processes, provides interfaces to vendors, publishers, and institutional financial departments, and gathers significant and useful management data. The second challenge is the ever-increasing pressure to streamline, become more efficient and productive, and automate routine acquisitions processes.

To meet these challenges we need to develop an automated environment more independent of the traditional library ILS. ILS vendors will not be able to keep up with library demands; changes come too slowly and systems are not flexible enough to suit local needs. Imagine a workstation-based environment, with local control over capturing, loading, creating, and managing records (invoices, bibliographic, pattern data, holdings, statistics) that also provides windowing access to vendor/publisher databases and other library applications. Imagine an acquisitions process not dependent upon a systems office for tape loads, report generation, running batch programs to print purchase orders, claims, and the like.

Some of these capabilities may be available now through some library systems or maybe have been developed by local programming, but generally not enough has been done to support the acquisition process. Although the development of EDI standards will improve many processes, the workstation environment offers many opportunities.

Some things I'd like to see include:

• electronic order requests from patrons and selectors

• online maintenance of requests and search results

• use of email for communication with patrons, selectors, and vendors

• online referral to documentation and guides to system use

• online vendor profiles to support choosing appropriate vendors for orders, monitoring vendor performance, and matching requests to approval profiles

• simultaneous access to local systems and vendor databases

• capability to load into the workstation bibliographic and billing information from vendor supplied diskettes or barcodes

• capability to scan paper-based information into local files

Here is a proposed scenario:

The library will provide requesters (patrons or selectors) with an electronic form to allow them to submit their request. Scanning technology will allow staff to take paper requests and scan them into an electronic form. Requests will be stored and queued until searching can occur and the order can be processed.

At the pre-order search stage, the system will keep track of the results of searching various sources. Online approval and blanket orders will be reviewed to see if the request fits any established profiles or the staff will compare the request with information in a vendor's database. Online *BIP* or other databases will be consulted. If an order is to be placed, staff will match the order to the appropriate vendor, browsing the online vendor profiles as needed to make a decision. Basic bibliographic records will be captured or cut and pasted from one of many available databases.

Orders can be held and reviewed online before printing at the local printer. The selector can be alerted over email that the order was placed.

For receipt shipments the vendor will supply invoices and bibliographic records electronically, either through an Internet file, diskettes that can be uploaded, or on barcodes that can be scanned into the local system. A barcode can be attached to the item or on the invoice and can be removed when the item is added to the collection. Traditional paper-based information will be scanned into the system instead of typed. If there is a question whether proper billing has taken place, staff will be able to match the receipt against the library vendor file to compare discounts, service charges, etc. with what is expected (as indicated in the online vendor profile).

Acquisitions staff will be able to capture local records to resend over email to vendors for claiming, status confirmation, or any other purpose. Staff will also be able to capture records from vendor databases to add to the local system. Libraries will share caption pattern data electronically. Vendors will ftp files of financial or other data to the library to input into their spreadsheet programs.

In this scenario loads of electronic bibliographic or invoice records will not depend on the systems or computer office schedules. More responsibility and independence is given to acquisitions staff to control the source and input of records into the local system. Staff will have more information online that is relevant to acquisitions work, and they will have easy, quick access through their windowing technology.

The transition to workstations is not cheap. It takes a big investment in hardware, software, printers, networks. It takes an additional investment in training, programming, and documentation. Acquisitions librarians will have to share their developments with each other and will have to cooperate more with the vendors to develop mutually beneficial software, interfaces and databases. But isn't it about time that we have a system that responds to our needs, can change quickly, and will link with our vendors and with each other? ✎