Charleston Library Conference

Saving Time, Energy, Keystrokes and Sanity: Adventures in Order Automation

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This presentation was a discussion about automating the book ordering and acquisition process at Providence College. The automation involved the College, our book vendor Busca, and our bibliographic utility provider SkyRiver. The purpose of the automation project was to reduce duplication of effort on each end of the transaction.

1. Why did we want to automate? Greater workload, fewer people to do the work, efficiency needed. We also are always encouraged to try new procedures.

2. Our current ordering process required the acquisitions assistant to manually import bib records, as well as manually key order records in our Millennium ILS. The cataloger would then duplicate much of this work when the book arrived.

3. We proposed changes to our workflow with Busca and SkyRiver. While neither of them had previously worked together, they were more than willing to work together as well as with us.

4. We aimed to modify our workflow so that "short" bib records and attached order records would automatically be generated from Busca's Web Office website. Once the actual order was fulfilled and the book shipped to us, the short bib would be replaced by a full record, automatically selected via a profile using SkyRiver's SkyMatch service.

5. Both Busca and SkyRiver had to make changes to their current systems to accommodate the project. Some of the changes required Busca to modify the back-end of their "Web Office" order website, so we could include fund code information for the automated record download.

6. There were obstacles to overcome along the way, involving both technical issues, workflow changes and retraining. However, our automation now rolls along smoothly. Other libraries who would like to undertake similar processes are encouraged to contact their vendors and get the process started.

The PowerPoint slides of this presentation can be viewed via this URL:
http://tinyurl.com/PC-book-order-automation