BIP 4 CD=LW

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BIP 4 CD=LW

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Abstract:

Using *Books in Print* database for organizing collection development requests has resulted in less work for all of us. Mercer University's Jack Tarver Library purchased the BIP database in 2010 and transitioned to using it more as an organizer tool than simply as a finding aid. This paper describes how this medium-sized academic library uses version 1.0 to 1) provide one-stop viewing of requests for library staff and the public, 2) reduce printing costs, and 3) make effective use of student assistants. Included are challenges we have encountered with moving to version 2.0 and detailed procedures for workflow using version 1.0.

Background

The Jack Tarver Library of Mercer University is a medium-sized academic library with five campuses sharing an Innovative system. Eight Subject Librarians handle a relatively small number of firm orders—2,180 in FY 11. The Associate Director for Public Services and Collections (hereafter supervisor) organizes and monitors requests and receives ten hours of assistance a week from a student worker. We purchased BIP in December 2009 because it allowed us to streamline our workflow, organize notes related to requests in one place, easily track an item from request to arrival, remove the need to provide Innovative training for our Subject Librarians and student assistants, and reduce our clutter and printing. We have not shifted to version 2.0, because it does not offer the functionality that is required by our workflow—as of this date no option to print the notes and list functionality is lack-luster.

BIP Lists

Since most of the items requested are available in BIP (those items not available in BIP are outside the scope of this paper and presentation), we create public lists to organize requests and track the workflow. We occasionally use a private list, especially if the items are not yet ready for searching by the student assistant. We can easily change these to public when the items are ready for the student assistant to perform their tasks.

The most important agreed-upon rule is that if you did not create a list, you do not delete it! We did not invoke any rules for naming of lists and recognize this could become an issue if other campuses

decide to use this feature. Subject Librarians are free to use their names or initials; we often group items for particular sources used to generate requests, such as NYTBR or Chronicle; and we created the following standard lists:

- Approval – university press titles that will be searched and usually ordered from our vendor
- OP – items that are out of print
- NYP – items requested that have not yet been published
- Requests – direct requests from faculty, staff, or students
- Reserve – items needed for reserve
- No entries – items ordered but not yet appearing in the catalog as on order
- Status 1 – items placed on hold rather than ordered
- Slow – items that have not arrived in 5-6 weeks
- Ask BES – items where Acquisitions input is needed
- Ask TPR – items where student needs input

We use the comment feature to annotate each request and track order receipt:

- Availability, including standard messages:
 - Already owned, on order, or available at another campus library
- Requestor, including last name and department
- Fund code
- Status of request, including
 - Taken to ACQ and date
 - Ordered and date
 - Cancelled and date

We use the group edit function to move items between lists which quickly identifies those that were

not ordered (no entries), placed on hold rather than ordered (status 1), slow to arrive (slow), shifted to the approval vendor (approval), or are now available (NYP). Any of us can look at a list to know which actions we need to take. Version 1.0 allows us to print the comment field and easily displays it, enabling the student assistant to update the order's status throughout the process.

BIP Workflow

Detailed steps are available at the end of this paper, and we strive to keep work done at the right level and not duplicate efforts. The student is responsible for initial searching, moving items among the standard lists or creating new lists, and adding the requestor's last name and department to each item. The supervisor reviews the lists, adds the fund code, adds any action accompanying the request, adds the note "taken to ACQ" and the date, and prints the list that the student assistant delivers to Acquisitions. Both the student assistant and the supervisor check each list frequently (based on the last updated date that BIP supplies), add notes as necessary, move items between lists, remove items when they arrive, and eventually delete empty lists. Individual items or an entire list can be printed or e-mailed which facilitates discussions with colleagues in Acquisitions and Cataloging. Subject Librarians know when items are available when they no longer appear on their lists.

The introduction of BIP and the public lists streamlined our workflow by providing that "one stop shop" that is available 24/7 and does not require training in our ILS for Subject Librarians or student assistants. Our Acquisitions colleague receives neater lists for ordering and can quickly identify items that might require a follow-up with a vendor or cancellation as the fiscal year winds down. The student assistant has a dependable source of work that requires minimal supervision after initial training.

Shift to BIP 2.0

Initially excited about the option to try out the new version, a webinar in January 2010 quickly revealed that the newly named note (formerly comment) field is not included in a printout. A second webinar

in February 2011 followed by a third in October 2011 confirmed that this had not changed. Exploration with the new version stopped, since the required output (lists with the comments included) was not available. While I have been assured that version 1.0 will not 'sunset' without full functionality, the lack of this feature is a deal-breaker for us.

Further exploration with the new version (taking it on faith that the note option is coming) revealed that the lists are lack-luster. Perhaps this is because refining to date has focused on discovery aspects. Since we are such heavy users of lists, it was quickly apparent that several features need work, including:

- Need ability to move (not append) items between lists
 - Our workflow breaks without this option
 - Append actually makes double the work, since item appears on more than one list
- Need ability for group editing
 - Our workflow includes updating groups of items and doing them one at a time is time-consuming
- Icon is required when printing lists
 - Helpful in discovery to differentiate versions
 - Requires more toner to print

Other items on our wish list include:

- Note field is one long box which makes it difficult to easily see action items
 - Appears to go on forever, so just make it tall instead of wide
- Note field has shifted to the far right-hand side of the list results screen and is difficult to read
 - Like it better underneath the title
- font size for printout is tiny
 - Perhaps saves paper ... but no one can read it without a magnifying glass!

Our dream wish list includes:

- Option to customize the list screen
 - Choose which options we want to show or hide
 - Allow the note field to be clickable and sortable
- Option to customize the printing

- Choose which options we want
- Remember my previous choices
 - Alert me if an item has previously been placed in a list
 - Even better if you tell me which one, but at least an alert of a potential duplicate order

Version 2.0 also produces a technical complication when using Firefox and Windows 7 by not allowing the pop-up of library catalog results screen. This works fine in 1.0, once we set it as an exception, but 2.0 places results in another window despite our best efforts. This is annoying, and is perhaps something that our systems folks can eventually diagnose and resolve.

Summary

BIP 1.0 has been a great product for Tarver Library. We took advantage of the opportunity to review and streamline our workflow and the results have been a “one stop shop” that meets everyone’s needs. We are disappointed that version 2.0 has not yet incorporated the functionality that we require and are hopeful that this is still in the plans and only delayed as they focus on discovery functions. If we discover that this functionality will not be included, we will begin the search for our next product.

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BIP (Version 1.0) Detailed Workflow

Student Assistant

- 1) looks first at the publisher column to determine if the item is published by a university press
 - moves these items to “Approval” list
 - adds the note “check Midwest approval plan”
- 2) searches each item in the library catalog, including those published by a university press, using the BIP function which has been config-

ured to search our catalog and return information on an author-title match

- 3) adds the item to a list
 - Creates standard lists, including: last name of Subject Librarian, source of request (NY-TBR, Chronicle, lecture, etc.), action needed (reserve, etc.)
 - Adds items to ask TPR list if not sure where to add the item
- 4) updates the comments tab to indicate possible statuses:
 - Tarver owns – includes a note if e-book or audio version is owned to ask if print is required
 - On order
 - Under consideration – means item is on hold, rather than ordered
 - Available – at another Mercer library, just not Tarver
- 5) Updates the comments tab if the item is not at Tarver, on order, under consideration, or available
 - Adds requestor’s last name followed by a slash and a 3-digit code for their department (list provided)
- 6) Notifies supervisor which lists are ready for next steps

Supervisor goes to BIP lists

- 1) Checks approval list to see if item is available from Midwest
 - Orders from Midwest, if available, and updates comments tab to include date ordered
 - Shifts to another list if item not available from Midwest and updates comments to indicate not available from approval plan
 - Adds requestor information, note “taken to ACQ,” and date
- 2) Checks all other lists and
 - Confirms/adds requestor’s last name and department
 - Adds fund code
 - Adds any action items needed
 - Withdraw/transfer earlier edition, and include call number
 - Reminder about gift plate (generally tied to fund code)

- Contact information if requestor asked to be notified, or if item to be delivered via Tarver Take Out
- Adds note “taken to ACQ” and the date

Student assistant monitors BIP lists frequently

- 1) Searches the catalog a week after the item was taken to ACQ
 - If found and on order, changes note to “ordered” and date
 - If found and on hold, moves to “status 1” list
 - If not found, waits several days and searches again
- 2) Searches the catalog 3-4 weeks after item was ordered
 - If found, takes any action required they can handle
 - Notifies supervisor of action(s) they cannot handle
 - Removes item from list

Supervisor monitors BIP lists frequently

- 1) Follows-up on any actions required for received items that student cannot handle
 - Arranges for delivery via TTO
 - Handles transferred/withdrawn editions
- 2) Moves to “no entries” any items not updated within 5-7 working days from “taken to ACQ” and date
- 3) Moves to “slow” list items not received within 5-6 weeks
 - Confirms with colleagues in Acquisitions that item is available, just not received