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Joyce L. Ogburn
Yale University

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Acquiring Minds Want to Know

Acquisitions and New Technology

Column Editor: **Joyce L. Ogburn** (Yale University)

*For this issue I wanted to do a followup of my last column that described how acquisitions operations might benefit from the use of workstations to augment local systems. This column outlines the application of workstations in development here at Yale. I have asked a member of the Acquisitions Department to describe this work. **Daniel Blaustein** has been invaluable in developing and implementing workstations for acquisitions. Since he has contributed so much to our efforts, I thought he should write up a description of what we are doing here at Yale. Thanks, Dan!*

As for a little background, the first workstation was developed for cataloging and acquisitions took the cataloging prototype and adapted it to our needs. We are also in the midst of deploying workstations across the entire library system and we are learning something new almost daily. We use NOTIS as our ILS and the workstations are 486DX, IBM-compatible machines. — JLO

Windows, Hotspots and Macros: A New Approach to Automating Acquisitions

by **Daniel Blaustein** (Yale University)

In the last issue of *ATG*, Joyce Ogburn detailed her vision of an automated future for library acquisitions. While we are probably several years away from self-ordering monographs and talking invoices, the Yale Library has been taking definite steps toward a computer-assisted acquisitions process. Making use of the Windows environment and McGill's NET3270 communications software, we have greatly simplified the work of acquisitions staff, with electronic cutting-and-pasting and mouse clicks replacing much of the typing inherent in acquisitions work.

The Windows multi-tasking environment has many advantages over the single-tasking dumb terminals we had been using prior to the installation of workstations. We frequently display two windows on the screen at one time, one window containing a connection to our library database, and the other a connection to our vendor's database. This enables us to look back and forth at both our records and our vendor's records for a given title, to see, for example, if our library has received the

latest volume in a particular monographic series. Previously, going back and forth between these two records would have necessitated logging off of one connection and logging on to the other, a time-consuming process. Besides offering this convenient way of comparing records, the Windows environment has many other uses. By having a connection to the library database in one window and an e-mail connection in another window, it is a simple matter to copy our bibliographic or order records and send them to a vendor for examination. Or, if we find it necessary to send paper mail to a vendor, we can copy the vendor's address from our database in one window, and paste it into a word processor running in another window.

While supporting Windows' copying and pasting capabilities, McGill's NET3270 communications program has several other features which make acquisitions work less keyboard-intensive, resulting in fewer errors and less fatigue for acquisitions staff. There are two features in particular which, with proper programming, turn acquisitions into a matter of pointing-and-clicking: hotspots and macros.

The built-in macro editor in the NET3270 program allows frequently typed-in sequences to be given a name; this name can then be invoked to perform the associated sequence. In conjunction with hotspots, however, these macros are much more than programmable function keys. Hotspots, in NET3270 parlance, are user-defined text strings associated with a macro (or system command) which, when double-clicked with the mouse, cause the macro to be executed. The implications of the combination of hotspots and macros in reducing typing, with its inevitable errors, are tremendous. As an example, take Yale's NOTIS database. Order records are represented on the screen as strings consisting of two status letters followed by several numbers, the first three of which indicate the record's position among all the order records for the particular title. A typical string for the first order record for a title, therefore, might be something like BN-001-001. After creating a hotspot to associate this string with the macro that brings up the first order record, simply double-clicking on this string will cause its associated order record to come up on the screen. This is analogous to the Windows and Macintosh GUI (Graphics-oriented User Interface) — double-clicking on an item causes the intuitively anticipated action to be performed upon it, in this case the opening up of the record. It was a simple matter to write a program that generates hotspots associating all possible order record strings with macros that cause the appropriate record to be brought up on the screen. In fact, we have hotspots sprinkled across the screen to bring up volume holdings and item records, to switch us from staff mode to public mode, and to toggle us between our own and a locally mounted LC database.

Like hotspots, a customizable toolbar provides a way to execute macros with mouse clicks. In this case, user-created

"buttons" on the screen cause their associated macros to be executed with a single click. We used this toolbar in conjunction with macros to make up for NOTIS' inability to copy a portion of one record into another. To support a serials vendor transfer project, we created two buttons on the toolbar: one, when clicked, copied selected information from the old vendor's record into the computer's memory; the other button pasted this information, along with other data specific to the new vendor, into a second record. The buttons eliminated the need for staff to actually copy call numbers and other information from one record into the next. In addition to making less work for staff, this prevented call number transcription mistakes — mistakes which are quite an ordeal to correct once discovered.

Another handy feature of NET3270 is the configuration of the mouse: the user can associate a combination of the shift and control keys and the right and left mouse buttons to simulate certain keystrokes (such as Enter, Tab and the function keys) as well as perform user-defined macros. In our library, for instance, holding down the shift key and clicking the left mouse button while looking at a title brings up its bibliographic screen, whereas holding down the shift key and clicking the right mouse button brings up the title in public mode.

A fifth feature of NET3270 that we take advantage of, most likely in a manner unintended by the program's creators, is the use of the Password command. To facilitate logging into a session, NET3270 allows a user's password to be saved, in encrypted form, for use in autologon macros, where it is sent to the host computer when the Password command is included in the macro. At Yale, however, we use this password feature to allow for variables to be included in our macros. For in-

stance, the order records for blanket orders received from any one vendor are identical, except for the field that holds the invoice number on which the titles were received. Using the Password command, we can create macros to deal with just this situation: at the point in the macro in which the invoice number would be sent to our database, the Password command is invoked instead. The acquisitions staff, on receiving a blanket order, can simply input the invoice number into the Password field, and an order record can be created for each title on the invoice with the same macro. When another invoice comes from the vendor, staff need only change the invoice number in the Password field in order to reuse the macro; it is not necessary to rewrite the macro at all.

All of these features, from cutting-and-pasting to variable macros and hotspots, dramatically simplify the acquisitions process, often replacing tedious typing with a few swipes of the mouse. By making acquisitions more macro- and mouse-intensive, staff are likely to make fewer errors. It is very easy to make a typographical error when specifying which order record to bring up on the screen — the result could be as dramatic as the cancellation of an order other than the one intended. A user is much less likely to double-click on the wrong order on the screen. In addition, a properly-configured macro for creating blanket order records completely eliminates the possibility that a user will forget to suppress the order, accidentally sending the order out to the vendor.

While the acquisitions process will no doubt eventually become even more automated, the use we've made of the Windows environment and the NET3270 program as detailed above are certainly a step in the right direction. ☛

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