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Biz of Acq -- Collecting in the Cloud

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Papa Abel Remembers from page 62

aim was to present a handsome campus to passersby and pleasant grounds for the staff in good weather. He located such a site of about twenty-five acres in a semi-rural setting with good transportation access. And with that, the firm was on its way to a fine solution to its long-standing space problems, and the staff was able to communicate readily with one another, thereby greatly improving the efficiency of the Portland office. And what a marked improvement over the old, outworn garages, manufacturing plants, and storefronts which had been the firm's habitat from its founding this was proved to be.

Keith was then faced with the problem of financing such a substantial acreage and building cost. Financing is a never-ending preoccupation of every growing firm. But it is a particularly difficult matter in the case of a bookseller. Few bankers or investors have any interest in so marginal a trade as the book-trade and particularly the scholarly book-trade. Hardly surprising when investments in manufacturers, contractors, car and appliance dealers, etc. dealing in genuine hard goods are widely available — nothing so questionable as scholarly books the customers for which are widely and thinly scattered



across the face of the globe. Scholarly books are an arcane and difficult-to-dispose-of form of collateral. Whatever, **Keith** succeeded in lining up the financing for this project.

While this undertaking of a building to solve our efficiency problems and attendant financing problems consumed much management time, the work of offices scattered across North America and with a beach-head in Europe continued on apace. Sales continued to grow, procedures were routinely being refined, and various amalgams of the array of services the firm had developed were constructed in response to the unique needs of particular libraries.

All of this growth naturally led to a number of people joining the operating staff. This growth in numbers of staff led to an amorphous problem. When the staff was small and the range of services offered limited, new staff members rather naturally and quickly came to understand not simply the procedures associated with the jobs to be accomplished but the spirit of the firm, the dedication to the idea of the scholarly library, and their place in the operation of **Gutenberg's** knowledge generation and dissemination engine — of getting knowledge from those who knew to those with a need to know. Something had to be done in a more formal manner about getting the new staff up-to-speed on these basic principles underlying the specific tasks performed by the firm. So the managers were all asked to articulate

these precepts to their staff members. Some of us involved with larger numbers undertook to gather staff for more formal sessions articulating this sense of the grounding and purpose of the firm. This initiative seemed to be of help in generating and maintaining a common sense of the *raison d'être* of the firm and the jobs it was expected to perform.

In order to meet the increasing need for Approval Plan forms, the computer staff had converted the printing of these forms from an array of **Flexowriters** (something on the order of 25 machines occupying a medium-sized room, as I recall) to the computer printers. Catalog card databases and production had always been fully-executed on the computer. So, the computer was finally fully-integrated as a stand-alone device in the work-flow of the firm. **Gary Olson** and the computer staff had, in effect, pioneered the integration of the computer into the heart of the library acquisitions and cataloging functions. The firm could now provide an integrated body of the principle functions on the book side of the scholarly library.

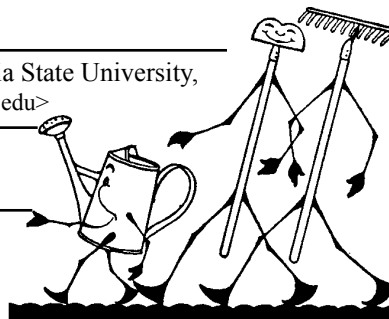
Whatever the passing elation of reaching that mile-stone, the firm remained embedded in a rapidly evolving environment. This changing environment demanded continued attention to maintaining the reputation for responding positively to the changing needs of the scholarly library, as well as operating its systems and procedures in the most efficient way possible. 🌱

Biz of Acq — Collecting in the Cloud

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Out With the Network (Drive), In With the Net

Using technologies to streamline services is old news at most libraries. Tools such as online video tutorials, elaborate subject pages, and online forms have been quickly adopted at the reference and circulation desks to both guide our users and solicit their input about our services. At the same time, our collections are an ever-richer mix of online journal packages, eBooks of various stripes, databases, and streaming media. And yet, some of our library selection tools and procedures missed the tech wave.

When we took on collections coordination duties, we inherited a system that had seen the University libraries through major changes, from a predominantly print-based to a largely digital collection, not to mention wild budget vacillations. Our predecessors were extremely

thorough and detailed, housing all manner of title lists, budget scenarios, and e-collections statistics on a shared network drive, that, like many such systems, had morphed into an untidy labyrinth of files and folders.

Moreover, collections decisions that required group input largely took place on email. Email is, without a doubt, one of the great communication devices of our time, but does anyone enjoy seeing her/his inbox light up with colleague number 14's indication that they too agree with the purchasing decision at hand? There had to be a better way!

Cloud Computing, as defined by **Wikipedia**, is "location independent computing, whereby shared servers provide resources, software, and data to computers and other devices on demand, as with the electricity grid. Or more simply, remote computing." Services like **Google** apps can help prevent the

chaos of a shared network drive overflowing with multiple versions of the same documents, while also making your collection's docs easier to search and organize. Similarly, tools like **SurveyMonkey** and **Jing** can round out your collections processes through simplifying your communication with colleagues about your shared collections decisions. Following are a few of the tools we've found most useful:

Google Docs and Sites

Have you ever tried unsuccessfully to locate a particular document on a shared drive, stumbling through Byzantine corridors of folders, eventually resorting to the dreaded **Windows** search function? Have you ever opened up an important document only to be prevented from making changes because someone else has it open, or worse, find that someone else has already made changes? What if you could

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transform that shared drive into a Website, with a menu, calendar, a place to post minutes, and a place to organize all of your important documents (spreadsheets, word processing, even presentations) without HTML/CSS skills? You may wonder how a Website is a worthwhile improvement on a folder structure on a shared drive. Let's take a look.

Google has created a series of Web applications, collectively entitled **Google Docs** that can be used to author documents, spreadsheets, and presentations. If you've never used **Google Docs** before, be warned: this cloud-based productivity toolbox may have you eschewing locally installed software altogether. In fact, **Google Docs** embodies the "cloud" ethos: lightweight yet powerful, easy to access, and free. For a quick, jazzy overview of what **Google Docs** can do, see **Google Docs in Plain English** (listed with tutorials at the end of the article). Another **Google** application, **Google Sites**, allows you to easily build a Website and place any of your **Google Docs** on the Web pages within (kind of like pinning a piece of paper to a bulletin board for display). **Google Sites** also offers a "File Cabinet" in which to store and share documents, an "Announcements" page for, well, announcements, and the self-explanatory "List" page, which allows you to enter information with a simple form. Combine these elements with some commonsense design, and you've got a place to get work done in collections.

Our Collections Committee homepage uses the List feature to display a list of current projects and their status. We use the Announcements feature for our Collection Committee minutes and a box on the home page displays links to the most recent minutes. The menu on the left is completely customizable, and we often include a little "widget" that displays a countdown, for example "10 days until" whatever event you choose, when project deadlines loom. Because the site is designed for sharing with subject librarians, most of the information is organized according to projects like "Book Ordering" or "Reference Purchases" or "Usage Statistics." Each page usually contains textual information and an embedded **Google** document or file attachment (can be any format). It's very simple, but also quite a bit easier to deal with visually than a series of nested folders on a shared network drive.

We think organizing collections work with **Google Docs** and **Sites** has some crucial advantages. First, all of the data is automatically and securely backed up on **Google's** servers. Second, you can access your information from anywhere, without complicated remote access configurations. Third, it makes collaboration much easier. Group editing of documents is almost simultaneous and you control access to documents, which can be completely private or public, or shared with a few collaborators. And finally, each document has a complete revision history, meaning you can view all of the changes made to a given document and who made them. You can revert to an older version

of a document at any time. No more multiple versions of the same document floating around on that shared drive!

Are there disadvantages? Depending on your campus IT department, you may not be allowed to use **Google Docs** for official campus business. **Cal State East Bay** uses the enterprise educational version of **Google** for email/calendar/Web apps, but we actually set up our workflow using **Google Sites** and **Docs** before that transition. Second, if you are an **Excel** master and have complicated formulas and formatting, these features may not transition well to **Google Sheets** and likewise with **Google Docs**. Third, though this approach makes information more findable, it does take maintenance and can devolve into chaos if neglected. Finally, and probably most daunting, getting used to cloud-based word-processing and spreadsheets can take some time and pose a challenge for the technologically hesitant. But we encourage you to dive in and start experimenting.

Though we use **Google**, the same approach can be taken with other software. **Sharepoint** is a common system available to most of us in higher education and can be customized to behave similarly. Though we found **Sharepoint** to pose a higher learning curve for our librarians, it might be a better option in certain organizational environments, especially if your IT department supports it. If you just want to create some visual organization with an intranet-like Website, try **Weebly**. **Weebly** allows you to create simple and beautiful Websites with point-and-click technology and has both free and low-cost options. Another Web-based option is the **Zoho** suite of applications, which includes word processing (**Zoho Writer**) and spreadsheet (**Zoho Sheet**) functionality, as well as a wiki, project planner, and more.

Survey Monkey and Google Forms

SurveyMonkey conjures images of vine-swinging census-takers, but is in fact a dead-easy online survey tool. You may have already used this ubiquitous service to assess library programs or instruction sessions, and if you haven't, you've almost certainly encountered one of these surveys on your favorite blog or listserv. With a free basic plan, you can create a survey with up to 10 questions and 100 responses. For many collections decisions, this will be enough, but if you need more flexibility or are planning to use **SurveyMonkey** for other data collection (it's a wonderful research tool) we recommend upgrading to a subscription account.

SurveyMonkey offers lots of flexibility in terms of question styles, offering a range of drop-down lists, multiple choice, and essay response boxes. Subscription plans allow you to display response data in a variety of ways including bar graphs and pie charts, and also export data as pdf or MS Excel. We put this flexibility to the test in a series of collections surveys. In one of our first uses of **SurveyMonkey**, we polled our colleagues about potential database cuts, asking them to rank these electronic holdings in light of usage data, program support and cost, and also enter

textual comments about their choices. To be sure, this is not the happiest survey topic, but we found it allowed us to get an idea of what our group was thinking before the meeting at which we discussed our decisions. It may seem like a simple approach, but consolidating feedback in a single online location and sharing this information prior to the discussion made for a much more efficient process, and even a shorter meeting!

For collection managers on a shoestring, **Google Forms** is a fully-featured alternative to **SurveyMonkey**, albeit with a slightly steeper learning curve. Free with a **Google** account, **Forms** is one component of the **Google Docs** suite. It allows you to store documents online that are accessible from any computer and, better still, these documents can be edited by multiple participants, designated by the document owner. **Google Forms** essentially makes your survey tool (the form) the public face of a **Google** spreadsheet. Like **SurveyMonkey**, you can configure your form in a host of ways (multiple choice questions, comments boxes, Likert scales), and once respondents add their data, your spreadsheet is instantly — and tidily — populated. When you are done collecting the data, it's very easy to share it with your colleagues. Our annual reference purchase suggestion list is entirely managed via **Google Forms**, which are embeddable within **Google Sites**, and can even be emailed.

Doodle and WhenisGood

Although it sounds like something you'd use to kill time during a dull meeting, **Doodle** is actually a meeting scheduler and simple polling tool. We've primarily used **Doodle** and a similar Web application, **WhenisGood**, to solve the old problem of trying to find workable meeting times for groups. Like **Google Forms**, **Doodle** prevents long email chains, organizing all respondents' preferences in one, central location. While an account is not required, we recommend registering for a free **Doodle** account, which unlocks advanced features such as syncing with **Outlook** or **Google Calendar**, and a dashboard feature that lets you track meeting requests and polls you've created or have participated in. Creating a meeting scheduler is a very simple affair. You simply give the meeting a name, add descriptive information if you wish, select some possible dates on a clickable calendar, choose a few possible time slots, then send it off to your group. When you log onto **Doodle**, you can see who has responded, and available meeting times are clearly marked with a green "okay." Once all responses are in, you can simply save the chosen time to your calendar and invite participants.

WhenisGood is functionally similar to **Doodle**, although it looks a bit more like a day planner. To select meeting times, you simply "paint" over your available hours on the calendar-planning grid. **WhenisGood** also offers advanced features for those who sign up for free accounts, and like **Doodle**, will even correct for time zones, should you be planning a conference call with a colleague or vendor on another coast.

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Jing

As reference librarians and liaisons to several departments, we will tell anyone who will listen that **Jing** is the single most useful “explainer” tool ever conceived. Have you ever painstakingly listed out demonstrative steps in an email to a student or colleague (e.g., click here, scroll there, find the button...)? **Jing** lets you capture quick screen recordings or other videos, upload them to a free online account, and share them instantly. The quality isn’t exactly **Final Cut Pro**, but on the plus side, with few bells or whistles to contend with, it’s extremely easy to learn. And once you do, you’ll never go back. In our collections process, we use **Jing** to send out demos of new products and even to train our colleagues on how to use our online book ordering system.

Summing Up

Web-based tools offer countless opportunities to hone your collections process. For little or no cost, you can create collaborative, interactive collections sites, forms, and documents. Below is a resource toolbox to get you up and running.

Tools Roundup

Doodle: www.doodle.com

Google Docs: www.google.com/docs

Google Sites: <https://sites.google.com>

Jing: <http://www.techsmith.com/jing>

SurveyMonkey: www.surveymonkey.com

WhenisGood: www.whenisgood.net

Weebly: <http://www.weebly.com>

Zoho Apps: <http://www.zoho.com/>

Tutorials:

Google Docs YouTube Community Channel: <http://www.youtube.com/user/GoogleDocsCommunity>

Search on: **Google Docs in Plain English, Using Forms in Google Docs, Google Sites Tour, Jing Overview:** <http://video.techsmith.com/jing/2.1/overview/default.asp> 

And They Were There

Reports of Meetings — 30th Annual Charleston Conference

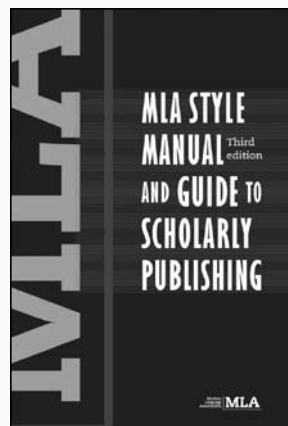
Issues in Book and Serial Acquisition, “Anything Goes!” Francis Marion Hotel, Embassy Suites Historic District, Holiday Inn Historic District, and Addlestone Library, College of Charleston, Charleston, SC, November 3-6, 2010

Charleston Conference Reports compiled by: **Ramune K. Kubilius** (Collection Development / Special Projects Librarian, Northwestern University, Galter Health Sciences Library) <r-kubilius@northwestern.edu>

Column Editor’s Note: *Thank you to all of the 2010 Charleston Conference attendees who agreed to write short reports that highlighted sessions they attended. All attempts were made to provide a broad coverage of sessions, and notes are included in the reports to reflect changes in the session titles or presenters that were not printed in the conference’s final program. Slides and handouts from many 2010 Charleston Conference presentations can be found online at <http://www.slideshare.net/event/2010-charleston-conference>, and the *Charleston Conference Proceedings* will be published sometime in Fall 2011.*

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