Against the Grain

Volume 28 | Issue 2 Article 39

2016

Let's Get Technical--The Paper Chase: How One Library Tackled the Chaos of Media Ordering

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Recommended Citation
Marien, Stacey and Mundt, Alayne (2018) "Let's Get Technical--The Paper Chase: How One Library Tackled the Chaos of Media Ordering," *Against the Grain*: Vol. 28: Iss. 2, Article 39.
DOI: https://doi.org/10.7771/2380-176X.7338

Let's Get Technical — The Paper Chase: How One Library Tackled the Chaos of Media Ordering

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The Situation

The Media Services (MS) Unit of the **American University Library** develops and maintains a collection of visual media materials, offers media related services, and provides classrooms, equipment, and other playback facilities in support of the academic and staff development programs of the University. The collection contains approximately 15,000 DVDs and approximately 50,000 streaming titles. MS has their own budget that runs between $40,000 to $50,000 a year. About 1,000 DVDs are purchased annually.

The Problem

Previously, all media requests were submitted to Acquisitions by the Media Librarian. These orders were madness and chaos! Often times, a sheet of paper would make its way to the Acquisitions staff that contained only the title of the video and the price. Sometimes orders were submitted through email, sometimes through phone calls, most of the time on pink cards (purchase request forms). When a sheet of paper with 100 titles requested for purchase was misplaced by an Acquisitions staff member, we knew we had a problem. There had to be a better way to place and track the orders for our Media department.

The Acquisitions department, in partnership with Reserves, had already developed an in-house system to track reserves requests. A staff member in Circulation had knowledge of Microsoft Access and became the architect of a system that was called RAD (Reserves Access Database). The Reserves department within our library is a distinct collection and has its own budget. It lent itself well to being tracked by a unique system. RAD solved several problems for Acquisitions. It eliminated redundant requests, consolidated requests in one place, and improved order-tracking capabilities.

When the problems with MS came to a head, we decided to adapt the RAD system to accommodate MS ordering. Adjustments were made to create RMAD (Reserves and Media Access Database). RMAD could address several problems that were unique to media ordering. That is, hundreds of orders were placed each month, the order lists lacked crucial information, orders were often duplicated or lost, it was impossible to track the orders, and reams and reams of paper were produced.

The Information

We wanted to make media ordering streamlined and eliminate the boxes of paper that were used each month for printouts from **OCLC**, the catalog, and vendor Websites. Using RMAD, orders were now consolidated into one place and the workflow was made transparent and paperless across departments. A note field was added to RMAD so information could be shared and a question status was added to alert the Media Librarian of ordering snags, such as a DVD not being available for institutional purchase. RMAD made it easy to archive information and keep ordering history. Since the process was now automated, there were no more handwritten notes or handwritten purchase orders, and anyone could locate and track each purchase request.

The Players

Media Librarian

Acquisitions Data Management Specialist

Acquisitions Librarian/Acquisitions Coordinator (both have the authority to use a purchasing card for orders)

Acquisitions Specialist

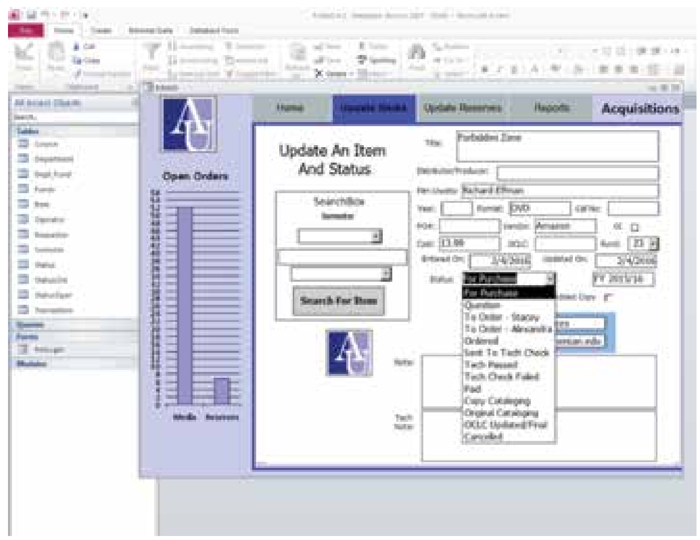
Visual Media Collections Coordinator

Media Services Specialist

Cataloger

The Ordering Process

1. Within RMAD, the Media Librarian enters the order information into an electronic form. He includes the title, distributor/producer, year, format, vendor, cost, fund code to charge the order and a note if needed to the Acquisitions Data Management Specialist (such as if the order is a rush or duplicate). The request is then routed, via a drop-down menu, to the For Purchase queue. Each queue in the drop-down menu represents a workflow that may involve multiple departments.



2. The Acquisitions Data Management Specialist checks the For Purchase queue every day for new orders. He researches where to purchase the item and enters in the exact URL for the item from the vendor's Website into the notes field. This ensures that the correct item will be purchased. He downloads the **OCLC** record into the catalog (or creates a dummy record if no **OCLC** record exists) and adds the **OCLC** number to the order form. He creates a corresponding purchase order in our ILS system. The notes field is also used if a question arises about the order. The question will be put into the notes field and then routed to the Question queue for the Media Librarian to review.
3. The Acquisitions Data Management Specialist will route those titles that are being ordered by the Acquisitions Librarian (or the Acquisitions Coordinator) to the For Stacey (or Alexandra) queue. He will send an email alerting the Acquisitions Librarian or Acquisitions Coordinator to orders that are ready. There are some vendors that the Acquisitions Data Management Specialist will order from directly, such as **Midwest Tapes**.
4. The Acquisitions Librarian or Acquisitions Coordinator (they share the ordering duties) will access the appropriate queue and copy and paste the URL in a browser to find the exact item. They will place the order using a purchasing card. Once an order is placed, the title is routed to the Ordered queue.
5. When the title arrives in the library, the Acquisitions Specialist quality-checks the item to make sure it is the one that was ordered, finds the order in RMAD and routes the title to the Sent to Tech Check queue.

continued on page 77

Let's Get Technical
from page 76

6. The title is placed in an area in the Acquisitions department for MS. The Visual Media Collections Coordinator checks every day for new titles to pick up. It is her responsibility to check each video to make sure it works. The title is either routed in RMAD to Tech Passed or Tech Failed. If it's in the failed queue, the DVD is usually returned to Acquisitions to be returned to the vendor (this rarely happens). For those titles that pass, the following details are added to the Tech Notes field:

   Assigned call number

   Country of production

   Closed captioning/subtitle information

   If item is PAL and needs special playback equipment

   If item is a burned DVD-R

   Public performance rights status

   Any additional notes relevant to the Media Services Specialist when cataloging and considering circulation of the item (i.e. if this replaced a VHS and the VHS is now going to storage).
7. Those titles that are in the Tech Passed queue are then received in Voyager by the Acquisitions Specialist and non-credit card orders are invoiced. The title is then routed to the Paid queue in RMAD.
8. The Media Services Specialist catalogs the titles that are in the Paid queue and changes the queue to **OCLC** updated/final. He also updates our holdings in **OCLC**.
9. Sometimes a DVD will need original cataloging and will be sent to the Cataloging department instead of handled by the MS staff. In this case, the title is routed to the Original Cataloging queue.

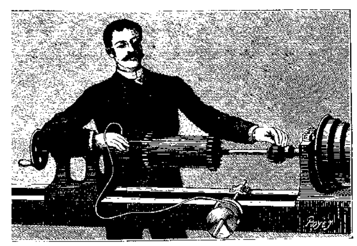
The Results

When we made the decision to tweak the ordering system to add in media ordering, we had to meet with all the parties involved to confirm workflows. This was a benefit to all departments (Acquisitions, Cataloging, MS,) as we were able to get together in one room and map out the workflow of a DVD, from requesting to ordering to receiving to tech check to cataloging. Many of us did not realize what other units were doing or not doing in the order workflow.

One of the biggest benefits to this system is the reduction of paper used. Almost all paper was eliminated by using this system. The Acquisitions Librarian still prints out the Purchase Order and joins it with a copy of the order confirmation. She uses this paper every month to keep track of her purchase card orders and to ultimately reconcile the orders with the charges on the purchase card.

The use of RMAD has made it relatively easy to track the whereabouts of a particular DVD within the library. There is better communication among the Media Librarian and those responsible for placing the orders. The turnaround for orders is much quicker, as it is usually 24-48 hours from the time the order is entered into RMAD to the time the order is placed. This results in more orders being processed per day. Those orders that are marked Rush in RMAD (usually a specific faculty request) are treated first.

Workflows have become streamlined and all departments involved have a greater understanding of each other's work. RMAD is really a "departments without borders" tool and crosses silos that had stood prior to its implementation and has helped to improve communication and reduce redundancy and inefficiency across multiple library departments. This is a tool that is used to do the work across all processes, from soup to nuts, and it has had a team-building effect. The librarians and staff are much happier!



Both Sides Now: Vendors and Librarians — When Is A Trade Show Not A Trade Show?

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Virtually every industry is aligned with one or more associations that organize and sponsor an annual trade show. Moreover, many of those associations will sponsor even more localized shows throughout the year so as to interest their members to attend the local meetings since they may not have the wherewithal to travel and/or have the necessary funding to attend the larger and more expensive annual meeting.

All vendors like well attended trade shows and conversely intensely dislike poorly attended ones. It's all about the company's ROI since the more people that visit the vendors' booth, the better the odds are of making more sales and even more importantly, interacting directly with more customers and prospects. A customer/prospect who is absent from a Trade Show is an opportunity missed, for both parties.

Associations encourage their members to attend local and/or national trade shows because where else can these people interact with all the important vendors within their industry vertical? It seems quite simple that the ability to compare prices, products, salespeople, etc. of various companies in one day is preferable to having the sales reps from a variety of companies travel to the library over a period of many days. Furthermore, senior executive staff will inevitably be at the trade show booth to meet and greet. Sure would make sense to speak to the CEO, President and/or VP of Sales individually and collectively from the company to discuss whatever topics are on the customers' minds at the show.

Yet, many trade shows in the information industry are struggling with attendance which is not beneficial for vendor or attendee alike. When these struggles continue, a trade show booth becomes a seemingly deserted island in a lonely exhibit hall and passes from being a productive meeting to a non-existent one. That's when the dreaded "Not a Trade Show" rears its ugly head.

The tell-tale signs of a "Not Trade Show" are when aisles at the exhibit hall are devoid of attendees. It's the old bowling ball routine which says that if you rolled a bowling ball down an aisle of a trade show and avoid hitting anyone with it, then that show is useless. Or if you see groups of salespeople aimlessly talking to one another at their booth, then that qualifies as "Not a Trade Show" as well. And when a Trade Show Is Really Not a Trade Show, that morphs into a waste of time and money for exhibitors and attendees.

What causes this phenomenon to happen? Who bears the burden of blame? Actually the association, the vendors and the attendees have to take some degree of responsibility when the trade show ceases to be productive for one or two or all three parties.

In my 30+ years of being an active participant at trade shows both as a vendor and an attendee, I have seen the good, the bad and the ugly. On the vendor side, I have seen sales reps

continued on page 78