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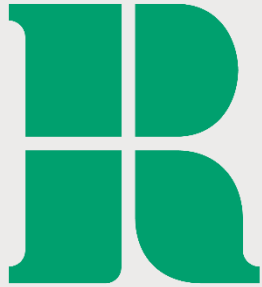
# Taking the halberd to inefficient reading list acquisitions processes

Roehampton's process

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University of Roehampton



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## The problems, the vision and the challenge

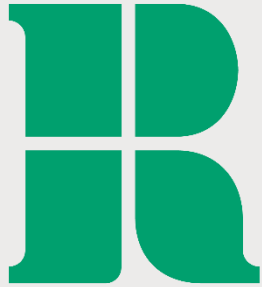
The issues with Reviews	What we wanted Reviews to achieve	The challenge of making that a reality
Wasting time – spending more time looking for work than actually doing it	We want it to highlight the work, not leave staff to hunt for it	Getting reliable constant data sets
Doesn't benefit the wider student experience. Reliant on submission	A view across the Reading List tenancy, all students can benefit	Can you get a spreadsheet to behave like a piece of software? Can it be painless?
Needing something that detected and highlighted the work to do, when institution aims differ so much	A much easier way to focus on collection development	The worry of a removal of 'task completion'. No more review to get your teeth into



## Considering your staff

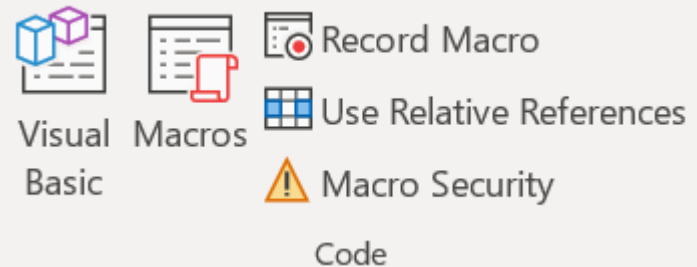
- Task completion needs to be replicated
- Accounting for tasks:
  - New print and e
  - Digitisation requests
  - Updating new editions
  - Investigate digi on an old edition
- How do we enable this. What data do we need and can we automate?

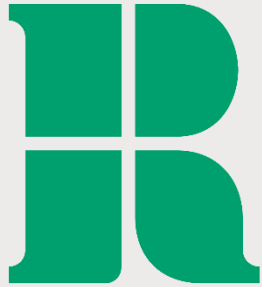
A screenshot of a task management interface. The main heading is 'Order new books for library (05/08/19)' with a sub-heading 'in list Book Orders'. Below this, there's a 'MEMBERS' section with a user 'JA' and a plus sign. A 'Description' section has an 'Edit' button and a link 'Please click here for this week's report'. The main task list includes 'Book Orders Checklist' (100% complete, with 'Hide checked items' and 'Delete' buttons), 'eBook ordering complete', 'Print ordering complete', and 'Library Engagement emailed for unable to obtain'. An 'Add an item' button is below. At the bottom, there's another 'Checklist' (0% complete) with a 'Delete' button. On the right, a 'SUGGESTED' sidebar contains options: 'Join', 'Members', 'Labels', 'Checklist', 'Due date', 'Attachment', 'Cover', 'Repeat', and 'Add Power-Ups'. A note at the bottom right says 'Get unlimited Power-Ups, plus much more.'



# The mechanics

<p><b>Good constant data</b></p> <ul style="list-style-type: none"><li>- Module/student data</li><li>- Editions data</li></ul>	<p><b>A purchasing formula</b></p> <ul style="list-style-type: none"><li>- The ratio you buy print to</li><li>- Whether that ratio changes based on your eBook licence</li></ul>
<p><b>An actions formula</b></p> <p>- Some logic which decides what action to give your staff based on its findings in the data</p>	<p><b>Workflow tools</b></p> <ul style="list-style-type: none"><li>- Outcomes</li><li>- Instructions</li><li>- Bringing data to the point of need</li></ul>

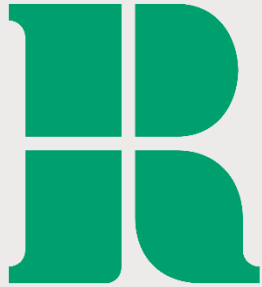




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## The actions formula

```
=IF((N2=""),"New title for library",IF(AND(AK2>0,AK2<>"Only ed.  
available",OR(AC2<>"",AD2<>"")), "Investigate",IF(SEARCH("digiti",AC2),"  
Digitisation Request",IF(SEARCH("chapter",AC2),"Digitisation  
request",IF(SEARCH("read",AD2),"Digitisation  
Request",IF(SEARCH("page",AD2),"Digitisation  
request",IF(SEARCH("chapter",AD2),"Digitisation request",IF(SEARCH("-  
",AD2),"Digitisation request",IF(AND(AK2>0,AK2<>"Only ed.  
available"),"New ed. suggested",))))))))))
```



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## The actions formula

```
=IF((LCN=""),"New title for library",IF(AND(NEW ED SUGGESTED>0,NEW ED SUGGESTED<>"Only ed. available",OR(LIBRARY NOTE<>"",STUDENT NOTE<>"")), "Investigate",IF(SEARCH("digi",LIBRARY NOTE),"Digitisation Request",IF(SEARCH("chapter",LIBRARY NOTE),"Digitisation request",IF(SEARCH("read",STUDENT NOTE),"Digitisation Request",IF(SEARCH("page",STUDENT NOTE),"Digitisation request",IF(SEARCH("chapter",STUDENT NOTE),"Digitisation request",IF(SEARCH("-",STUDENT NOTE),"Digitisation request",IF(AND(NEW ED SUGGESTED>0,NEW ED SUGGESTED<>"Only ed. available"),"New ed. suggested",))))))))))
```

To simplify to just search for not owned:

```
=IF(LCN="", "New title for library", "Owned")
```

## Example output – new titles for library

	A	B	C	D	E	F	G	
1	<b>Step 1:</b> Quickly double check to make sure we don't already own the book. If we do - link the title using LCN lookup.	<b>Step 2:</b> Order eBooks using bibliographic info in columns G-L, enter model ordered (or 'No eBook available' in dropdowns)	<b>Step 3:</b> Excel will automatically replace 'FALSE' with the number of copies to purchase by importance, student numbers and eBook model available  n.b. Remember - if we actually do own the title already, you may have to adjust this number/not purchase at all. If this is the case, set outcome 'In stock in library'		<b>Step 4:</b> Order copies and select outcome in dropdown (Always round up)  Remember to order a REF copy for Essential items		n.b. Action 'New title + digi request' pass to digi on receipt + chapter/required' into 'Internal Note' field or eBook available. Book will be pass receipt to digitise.	
2	Action required	eBook model Ordered.	Student numbers	Standard copies to purchase	Ref copies to purchase	Print Order Outcome	Importance	Official order
3	New title for library	Credit/Unlimited	24	0.2	1	On Order	Essential Reading	EDU020N83
6	New title for library	Credit/Unlimited	24	0.2	1	Duplicate - not ordered	Essential Reading	EDU020N83
		Credit/Unlimited in stock	5	FALSE	FALSE	In stock in library -	Further Reading	MUT020L22



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## Example output – digitisation requests

	A	B	C	D	E	F	
1	More Detailed Digitisation Instructions can be found in the Collections and Discovery Process Manual		Step 1: Collect books. Start Digitisation process of DCS using the module information & ISBN from book	Step 2: You should be able to find the chapter to digitise in the Library Note and Student Note fields below. Use EHESS or scanning to complete digitisation	Step 3: Once digitisation is complete, you can open the metadata to paste the digitised link by copying and pasting the item link (column H) into the browser. Please enter the chapter information	Step 4: Enter Outcome in column A. Please make sure you follow up with academics for page range queries and let them know when items are excluded. Please note your progress on Trello.	n.b. - Please when they more than t of 10% of academic w the
2	Action required	Digitisation Outcome	Official order number	List Appearance	Library Note	Student Note	Title
3	Digitisation request	Digitisation complete	#N/A	Research in the History of Philosophy (HSA020X617A)		Chapter 6 - Design and Chance	Truth, ration pragmatism: Peirce
4	Digitisation Request	Digitisation complete	#N/A	Identity, Diversity and Human Rights (HUR020L527S)	This chapter is already digitised	Please read Chandra Talpade Mohanty, Under Western Eyes: Feminist scholarship and	Third World politics of fe
	Digitisation request	Academic contacted	HSA020N212A	Myths and Mythology	Both copies are currently out	A big book in terms of both its	Sex in antiqu





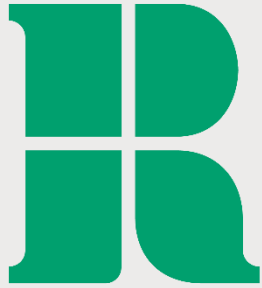
# The template

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1																			
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Click this enormous button to run All Items Review Steps 1-12:

1. Custom Sort by Date Added
2. VLOOKUP of Editions & Format Group Data
3. VLOOKUP of student numbers & Module Code for order number
4. VLOOKUP to determine Actions Required
5. Split data into new worksheets by Action Required
6. Format Digi request spreadsheet
7. Format Investigate spreadsheet
8. Format New Ed. Suggested spreadsheet
9. Format New Titles for Library spreadsheet (+ identify digi request&new title)
10. Print copy calculation by CDP
11. Split Worksheets into task spreadsheets and save to Sharepoint (Collections>Resource Lists>All Items Review)

Dashboard | PLACE DATA HERE | Column Orders | Instructions | Formulas | Editions Group ID | Module Data | ... (+) | ◀



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## Demand sorted – what about collection development?

Legacy of 'not reviewed' items need resourcing

Thinking more broadly, what is the 'Reading List Collection' lacking?

What will benefit our users the most. How can we make best use of our budget outside of new titles?

Do we have titles that are Core to the collection across multiple modules and programmes in ways the academics wouldn't be able to see?

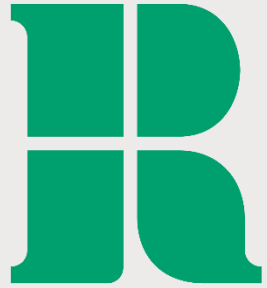


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## All Items Review and the Bulk Order. Worth the trouble?

PROS	CONS
<ul style="list-style-type: none"><li>- Efficient</li><li>- Holistic</li><li>- High success</li><li>- Endless possibilities</li><li>- Fair on users</li></ul>	<ul style="list-style-type: none"><li>- Small percentage will slip through the cracks</li><li>- Harder to report on KPIs</li><li>- Can be complex to set up</li><li>- Requires upkeep</li><li>- Can be challenging with change management</li></ul>

My answer. Of course. Better for students, better support for academics,  
easier to coordinate.



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Questions?

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