

NEOS Shared Acquisitions Pilot

PROGRESS REPORT

JUNE 9, 2017

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2014

As part of the **NEOS Strategic Agenda 2014-2017**, a **Shared Cataloguing and Acquisitions Task Force** was established to conduct an initial investigation into **collaborative cataloguing and acquisitions** and the potential for adopting them within NEOS

2015 Spring

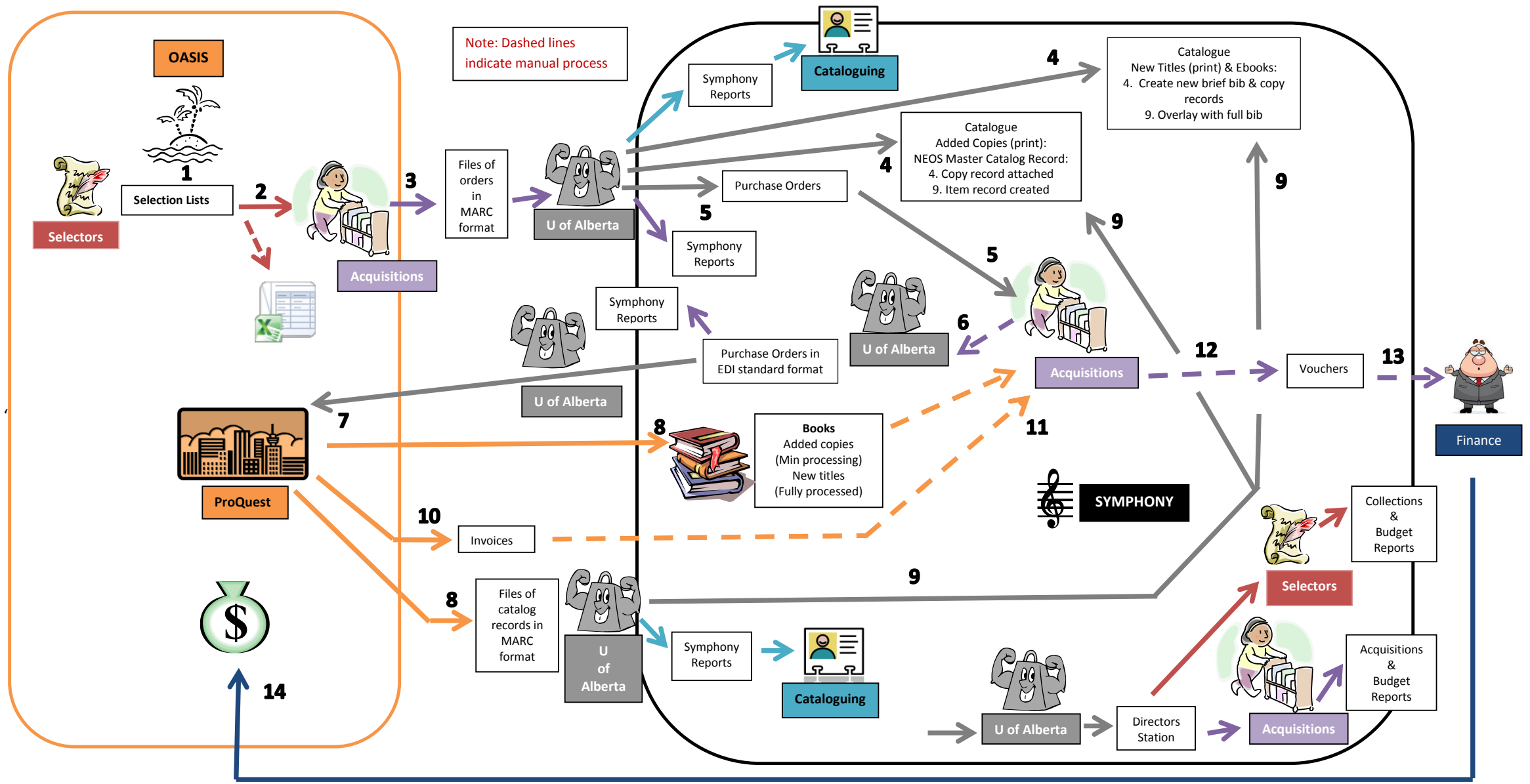
NEOS Directors Meeting

The Task Force presented a model for a centralized acquisition service

where libraries would implement the **ProQuest OASIS** selection web tool,
with a concurrent implementation of
downstream batch acquisitions and cataloguing processes in **Symphony**

The model spoke about a shared portal to the **ProQuest OASIS** tool
with all orders coming through one single ratifier

NEOS Shared Acquisitions



Note: Dashed lines indicate manual process

Catalogue
New Titles (print) & Ebooks:
4. Create new brief bib & copy records
9. Overlay with full bib

Catalogue
Added Copies (print):
NEOS Master Catalog Record:
4. Copy record attached
9. Item record created

Books
Added copies
(Min processing)
New titles
(Fully processed)

Collections & Budget Reports

Acquisitions & Budget Reports

OASIS

1 Selection Lists

Acquisitions

Files of orders in MARC format

U of Alberta

Symphony Reports

Cataloguing

Purchase Orders

4

Symphony Reports

U of Alberta

Symphony Reports

Purchase Orders in EDI standard format

U of Alberta

ProQuest

8

SYMPHONY

11

Acquisitions

12

Vouchers

13

Finance

14

10 Invoices

8 Files of catalog records in MARC format

U of Alberta

Symphony Reports

Cataloguing

U of Alberta

Directors Station

Acquisitions

Selectors

2015

A pilot of this model was planned:

DURATION: 2 months (Feb – March 2016)

PARTICIPATING LIBRARIES (6):

Concordia University
Lakeland College
Olds College

Grand Prairie Regional College
NorQuest College
Red Deer College

PILOT LEAD: MacEwan University

2016 February

The pilot was reimagined:

LONGER DURATION: 1 year (July 2016 – June 2017)

aligning with the fiscal year of the participants

LESS PARTICIPATING LIBRARIES (3):

Lakeland College

NorQuest College

Red Deer College

PILOT LEAD: MacEwan University

2016 March

Implementation begins:

Norquest College participates through acquisitions of firm print orders with vendor supplied processing and cataloguing

Lakeland College participates through acquisitions of firm print and ebook orders with vendor supplied processing and cataloguing

Red Deer College participates in the pilot solely via approval plan acquisitions

2016

April

Michael Betmanis from the **University of Alberta** joins the pilot team

..... implementation ongoing

2016 May & June

Letters of Agreement signed with **Proquest**

..... implementation ongoing

Service Level Agreements signed with
MacEwan University

2016 July

Implementation fee assessed and paid to
MacEwan University

... implementation ongoing, **but now behind
schedule**

NEW renegotiated Letters of Agreement
signed with **ProQuest**

University of Alberta (Jim Hamilton) begins to
routinely send Symphony holdings loads for
each pilot library to ProQuest

2016

August

Upgraded version of the **Who Owns it Tool** becomes available to the pilot libraries

... implementation ongoing, **but behind schedule**

This tool runs selection lists against the library's catalogue (for a holdings check) and against the NEOS catalogue (to determine cataloguing needs)

2016

December

NorQuest College completes their implementation and is in full operations for the pilot

6 months behind schedule

- This includes **NorQuest** fulfilling the role of ratifying their own orders

2017

February

Red Deer College completes their implementation and is in full operations for the pilot

8 months behind schedule

Lakeland College completes their implementation and is in full operations for the pilot

- This includes **Lakeland** fulfilling the role of ratifying their own orders

2017

April, May, & June

Participants consider extending pilot but choose to end as planned June 2017

Pilot survey conducted of participants

Survey results compiled

Next steps considered

2017 Preliminary Assessment

Wins:

- ✓ Improved selection process with the ProQuest OASIS vendor tool
- ✓ Batch creation of purchase orders
- ✓ Batch creation of order-level catalogue records
- ✓ Vendor supplied materials processing
- ✓ File import of vendor supplied cataloguing

Challenges:

- Complexity of processes
- Incorporating batch processes at the consortia level
- Problematic implementation

Thanks

NorQuest College:

Beth Vandenboogaard and Eve Poirier

Red Deer College:

Rosalie Bachor and Tara Gunsch

Lakeland College:

Laura Somerville

University of Alberta:

Michael Betmanis and Jim Hamilton

MacEwan University:

**Vanessa Bangay and Leanne Bowen and
Michael Schouten**