# Acquisitions Pilot Project Update
# April 2018

**What is this project doing?**

- Creating a standard series of configured Integrated Library System (ILS) policies for libraries that use the acquisitions module within the Montana Shared Catalog

**Why are we doing this?  What problem is it solving?  What will it achieve?**

- Some of the problems it is solving are:
    - Problems that occur with patron usage of the system (especially with holds) that are caused by conflicts between the way libraries have custom ILS policies that often perform the same function, but are named differently.
    - Inability to easily run data analysis reports across the entire system which is a request we regularly receive for either legislative reporting or from a desire on the part of libraries to compare their usage and services to other libraries.
    - Lack of staff time to maintain and customize acquisitions for libraries that are using pre-processing services from book vendors.
    - Librarians cannot always track funding and or usage in the categories they need to track.
- Standardization will position the MSC to adopt new technologies like the Blue Cloud suite and/or other new software.  There are few systems capable of handling a system as complex as the current configuration of the MSC.  This severely limits our choices when it comes to vendors.
- Some of the libraries within the MSC would like to explore cooperative collection development.  Those libraries need to have standard policies and home locations in order to implement such an effort.

**Which libraries are participating in this project?**

- Belgrade Community Library
- Billings Public Library
- Bozeman Public Library
- Drummond School/Community Library
- ImagineIF Libraries
- Miles City Public Library
- Missoula Public Library
- Montana State Law Library
- Sheridan County Library
- Sidney-Richland County Library

**What are the major components of this project?  What is the timeline for this project?**

**Outreach tasks** – April: Cara & Tracy will contact libraries within the pilot project to follow-up on specific questions and to meet with the sub-group interested in Cooperative Collection Development.

**New Policy Map** – Jemma – 3 phases:

1. mapping current policies in the ILS – completed by 11 May
2. Setting criteria for policy retention/policy harmonizing across pilot libraries – completed by 25 May
3. Creating new Acquisitions (Acq) pilot policy map  - called the Standard Acquisitions Procedure (SAP) map – completed by 22 June

**Meeting to approve the SAP Map** – all parties – should take place week of July 4th

If the libraries do not approve the SAP map, then we can't move forward.   If libraries have concerns about the policies, all other dates will have to be adjusted as we work through those concerns.

**Standard Acquisitions Procedures Draft** – Jemma – completed by 13 July

The SAP will include: a guide for any future Acq libraries in the MSC, with assistance about how to work with your vendor ; the approved SAP map of policies that can be used by Acq libraries ; procedural guidance for libraries using the Acq module, using Electronic Data Interchange (EDI) with their vendor, running 9XX/EDI reports & fiscal year roll over guidance.

Libraries wishing to participate in this project are tiered based on the level of implementation they can commit to:

A. Basic Acq configuration – just the module & SAP policies with or without Collaborative Collection Development
B. Acq module with 9XX ordering [holding codes configured]
C. Acq module with 9XX ordering and enhanced EDI
D. Acq module with 9XX ordering, enhanced EDI and Collaborative Collection Development
E. Libraries wishing to have access to Collaborative Collection Development without any Acq configuration – still using SAP policies

**Collaborative Collection Development reports** – Rebekah & Jemma – completed by 10 Aug

**Configure All SAP policies on MSC Test server** – Jemma & Amy – completed by 17 Aug

**Training** – Jemma, Rebekah & all library Acq & Selection staff – held the week of 5 Sept

Libraries will learn how to use the Acq module if they never have used it before this pilot. Libraries using 9XX/EDI for the first time will also receive training. All libraries will receive

Collaborative Collection Development reports training. This can be in-person, or since it is tiered, in module webinars. We will also test connectivity for any libraries that will be using EDI.

**Final Config on PROD & API changes** – Amy – completed by 14 September

Amy will copy all the config files that Jemma made on the Test server before the training. All current records with in the old Policy Map will go through batch changes. Cataloging will be suspended for a few days. Circulation should have minimal disruptions.

Libraries and Admin will also work together to create or modify vendor grid templates.

**GO LIVE** – we hope to flip the switch on the 14th of September, or over that weekend, depending on Admin decision. Libraries can begin using the new configuration on Monday the 17th.

**Debriefing and old policy cleanup** – through October & November