Textbook Workflow - Monographs

> ⓘ See [Textbook Workflow - DPP](#) for the latest DPP Textbooks workflows.
>
> [Ordering Summer Textbooks](#)

Contact bookstore for the list of textbooks.

The current schedule:

For the Fall semester list, email Ashleen on July 15, Aug. 1, Aug. 15, Sep. 1

For the Spring semester list, email Ashleen on Oct. 15, Nov. 15, Dec. 1, Jan 1

DPP works through each list sent from Ashleen.

Returns: Titles to be returned will be held until after the third shipment has arrived and all invoices have been sent for payment.

> Criteria for Bookstore to follow, per Collection Management :
>
> The adoption lists do not include: e-books, lab manuals, binders, model kits, course-packs, course- pack-like custom texts, or workbooks. Audio CDs and packages may be included. The Bookstore advises that, in some cases, they can only provide the publication as a package. The package may be the same cost as the textbook alone.
>
> As of 2/2019 we will accept any custom texts that are sent by the Bookstore, but do not plan to change the criteria established for the Bookstore to follow.

E-Preferred process

- DPP receives textbook list from bookstore & processes / creates order list
- DPP sends order list to Monographs (Ruth/Lynn)
- Monographs checks order list against GOBI to determine the availability of e- versions for purchase
    - GOBI alternate version [search process](#)
- Monographs removes ordered e-versions from bookstore order list & forwards final order list to bookstore
- Monographs (Ruth) sends new order lists and list of e-books ordered to Alex Reher (Access Services) and Silvia Sheffield (NRL).

E-preferred ordering

Per a discussion with C&RS, A&D will move to a policy of preferring to order ebook versions of textbooks over print where available, applying the following criteria:

- If a textbook isn't available in e-format at all, then order 1 print copy and let C&RS know so that they can make a call as to whether to order more copies.
- Overall cut-off price would be $500 for total spend on all copies (print & e-) (NOTE: cost changed from $300 to $500 per discussion with HD 7/20/2020).
- Can spend up to $500 for e- versions
    - License model preference is for DRM free/unlimited users, then Unlimited, then 3-user
    - If an e-textbook is only available as a 3-user, order 1 copy. (per Bertha C. discussion with AS)
    - If an e-textbook is only available as a 1-user, order 3 1-user copies as long as total cost is under $500 (per discussion with C&RS on 7/31/19)
- For textbooks we already own as e-
    - A&D will check the ebooks for their access
    - If book is limited access, follow [ebook upgrade](#) process

Rush Treatment.

Each book has a flag in it that reads **Textbooks Reserve**. If it is a branch book, it will have a branch flag as well.

These materials (along with other Rush) get the highest departmental priority!

Procedure for Receiving Textbooks.

Creating Invoice

- Advanced staff (David) will create the Invoice from the list provided by DPP, once any ebooks have been removed.
- Staff will Receive and Load each PO.
- Invoice ID = **Textbook-F1-2015** (Textbook-F(Fall,list#)-2015)

- Invoice will not be paid until all textbooks have been handled.

Each staff member will receive a cart of textbooks to Catalog

- Staff should open the **Google spreadsheet** that was previously shared
  - Locate the temp (brief) record title (All temp records)
  - Open the PO attached to the record
  - Load and Receive each title.

- In CATALOGING > MODIFY TITLE > search by title on the piece.
  - Open the temp record using the title on the Google sheet
  - Always Search by the title in hand (this may differ from the title attached to the Invoice ---bookstore truncated title)
    - Different editions, publication year, publisher are **not** duplicates.
  - Check for problems. Textbook Problem Resolutions
  - Flag problems and place on specialists cart (see specialist cart for flags)
  - Continue with the cataloging process
    - Be sure all textbooks are checked out to INPROCESS.
  - Overlay temp/brief records
  - Added copies that we are keeping: - move PO and delete temp/brief record

- **DO NOT add duplicate or suspected duplicate titles unless exception.**
  - **EXCEPTIONS:** The current copy is either MISSING, LOST, WITHDRAWN, CHECKED OUT or OVERDUE

- **DO NOT open plastic packaging until researched fully.**

- **DO NOT remove Online Access cards until textbook has been added.**
  - Textbook can not be returned if the Access card has been removed.

BUNDLES:

- Try to determine if we own bundled pieces before opening package. If impossible to determine from the packaging, open and add all items.
- The PO will be attached to a single title (the title listed on the spreadsheet, because the price is collective for all pieces.
- **Add an orderline:** *This title was bundled with "title," "title,"...* (list out the titles).

Locations & Item Types.

- These books should come from Acquisitions with the correct location and item type already in them with the following values:
  - D.H. Hill
    - Library = DHHILL
    - Home location = Textbook
    - Item type = Corebook
  - Hunt
    - Library = HUNT
    - Home location = Textbook
    - Item type = Corebook
  - Branches (will change Home locations to Reserves as part of their normal reserves processing)
    - Library = (specific branch)
    - Home location = **Stacks**
    - Item type = Book
  - Accompanying Materials included
    - Send items directly to Preservation once received and cataloged. Do Not place on Marking shelf.

Duplicates Textbook Problem Resolutions

- The goal is to minimize the amount of duplicates we receive. Duplicates will continue to arrive each semester if the ISBNs in the Bookstore data do not match the ISBNs on the MARC record. This happens frequently.
- Currently we are not keeping duplicates, though exceptions have been made.

Processing Textbook Invoices

Textbook Receipts are pre-paid by a SUB. They do not go thru the voucher process, but they do need to be approved.

Per Phyllis in F&B:

The Bookstore bills us via Service Unit Billing (SUB) not IDT. That means they take the funds out of our account and we reconcile the receipts you provide. Historically, SUB charges posted in WRS may lag a month or two behind the date on the receipt. We just need copies of the receipts provided by the Bookstore in order to reconcile the charges. If they can't be scanned and sent to me via email, the batched receipts can be sent to F&B and I'll pick them up.

- Pay Sirsi Invoice and prepare coversheet and create a PDF. Add the voucher stamp information and a note about cost of returns.
- Scan the receipts in an electronic document. along with the coversheet.
- Send document and coversheet to Maria Collins, Lisa Madden, Hilary Davis and Bertha Chang.....include Phyllis Carpenter.
- We should store the pdfs in G drive. G:\Acquisitions & Discovery\Monographs Unit\Invoices\Invoices 2020-2021\Invoices - Gobi and other

Returns

Returns are collected at the Specialist desk. Books that meet the criteria for not keeping are removed from Sirsi and set aside immediately. Once duplicate titles have been reviewed, evaluated, and determined they are to be returned, a Google sheet is started. This sheet contains all the fields from the full title list, plus additional fields requested by the Bookstore. Specialist matches each title to the bookstore receipt looking for price charged, receipt#, transaction#, and cashier#. All this is recorded on the Google sheet.

All Brief records, POs and invoice lines are deleted from Sirsi. Any missed titles or POs will be caught in the A&D financial error reports.

Once all the books are recorded, they are boxed up and addressed to the Bookstore. A copy of the Google sheet is placed in box #1. It is also shared with Ashleen Norris.

Textbook Returns Box 1 of x

NCSU Bookstores
Shipping & Receiving Dept.
Campus Box 7224
Raleigh, NC 27695