Options for implementing your Demand Driven Acquisitions (DDA) program using the WorldCat knowledge base

Demand Driven Acquisitions (DDA)* programs allow libraries to make eBooks discoverable to their patrons prior to purchasing. A title is triggered for purchase via significant use by patrons as defined by the library. OCLC can help you implement your DDA program using your existing OCLC services and subscriptions.

*The phrase “Demand Driven Acquisitions” can be used interchangeably with the phrase “Patron Driven Acquisitions.”

The first step to implementing a DDA program is to choose a vendor and work with them to configure the profile and parameters for your library’s DDA collection and to trigger purchases. You might also want to review your lending rights with the vendor.

Once you have chosen a vendor and set up your plan, OCLC will work with you to:

* **Set up automated feeds to your WorldCat knowledge base:** Request that your vendor sends OCLC data reflecting your DDA collection so we can load the collection data in your WorldCat knowledge base.

* **Maintain WorldCat holdings:** Set WorldCat holdings on your DDA titles in WorldCat. Once implemented, your holdings will be maintained automatically as titles are added and removed from your DDA collections.

* **Receive discovery records:** Evaluate your options for receiving MARC records for your local discovery interface. OCLC can provide MARC records including delivery of new, updated, and deleted records as titles in your collections change.

* **Expose titles in WorldCat Local:** Use the WorldCat knowledge base to expose full text “view now” links to your DDA titles for discovery in WorldCat Local.

* **Manage ILL options:** Manage ILL deflection as desired.

* **Track purchases in Acquisitions:** Set up processing for invoices (WorldShare Management Services libraries).

In order to provide you with a workflow for your library, consider:

**Which vendor you will use**
- The following vendors can supply OCLC with your DDA data:
  - Ebook Library (EBL)
  - Ebrary
- OCLC will add additional DDA partners in the future.

**Requesting the WorldCat knowledge base**
- If your library has not previously requested the WorldCat knowledge base, please review and submit the [request form](#). Consider adding various electronic collections to your WorldCat knowledge base or plan to use your knowledge base for DDA purposes only. When you are ready, we will contact your vendor and request a data feed reflecting your available DDA titles and a feed for your purchased titles that we will load to your WorldCat knowledge base.

**Setting WorldCat holdings on your DDA titles**
- Once your collection of DDA titles is loaded in your WorldCat knowledge base, you can turn on the option to set holdings in WorldCat. This automated process will set holdings for any new titles and will delete holdings for any removed titles. Your holdings in WorldCat synchronize automatically with the data in your WorldCat knowledge base.
If you want your DDA titles to be discoverable in WorldCat Local
As mentioned above, after you have finalized the process with your vendor/provider, OCLC will contact them on your behalf to request a data feed for titles available in your DDA plan.

Next, OCLC will load the holdings into your WorldCat knowledge base to support the “view now” links in WorldCat Local. Setting holdings in WorldCat will allow items you hold to rise to the top, in terms of relevancy rankings in a WorldCat Local search.

Options for discovery records to represent DDA titles in your local catalog
If you are using a local system or other discovery interface for discovery, you have options for getting records. OCLC can provide customized records for you as part of your full cataloging subscription.

- **OCLC WorldShare Metadata Collection Manager**: Outputs WorldCat MARC records based on your WorldCat knowledge base holdings. URLs to support e-book discoverability and access from within your discovery interface are included. Custom editing options are available such as the inclusion of provider names, collection names, knowledge base notes, free text notes such as 856 public notes, and deletions. Libraries will automatically receive new, update, and delete records as their WorldCat knowledge base holdings change.

- You can get records from your vendor.

- **OCLC WorldCat Cataloging Partners**: OCLC can provide MARC records with acquisitions data embedded for EBL purchases.

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How you will manage ILL
- Libraries that do not lend electronic materials can deflect ILL on all electronic resources in the policies directory by deflecting on format (e-audio/e-text/internet resource).
- Libraries that lend some electronic materials can set lending options on a collection-by-collection basis in their WorldCat knowledge base. They can then deflect ILL based on any knowledge base collections where they have set the ILL button to “No.”
- Libraries implementing a print DDA collection can deflect on “on order” status in their Local Holdings Record (LHR). This allows patrons to place a hold but deflects ILL. After purchase, the “on order” status must be changed to “available.”
- Libraries using LHRs can use a LHR-based deflection in tandem with the Policies Directory to deflect by individual title or by local collection.

Setting up invoicing in Acquisitions (WorldShare Management Services libraries)
WMS libraries should ask their vendor/provider to provide them with paper invoices. Then:

1. Process items on the invoice as either:
   - eProduct firm orders on regular order (current workflow for eBooks)
   - eProduct items on approval plan (possible new workflow)
2. Mark items as started/finished in Receiving - eProducts

OCLC hopes to work with vendors to offer electronic invoicing in the future.
Sample Library: Enlightened University Library

Background
Enlightened University Library is implementing a DDA program with EBL starting February 2013. The library:

* Will not ILL titles and does not lend any electronic materials.
* Uses WorldCat Local.
* Has not yet implemented the WorldCat knowledge base. Would like to use the knowledge base for purposes beyond their DDA program. They will add collections to their knowledge base to support “view now” links in WorldCat Local.
* Needs discovery records for their local system and has decided to get records from OCLC via OCLC WorldShare Metadata Collection Manager.

Sample Implementation

- The library submits the request form for the WorldCat knowledge base: [https://www.oclc.org/forms/wckb-request.en.html](https://www.oclc.org/forms/wckb-request.en.html). OCLC Order Services sends an Implementation Guide along with the library’s log in credentials. The library then has access to the WorldShare interface as well as to the Service Configuration interface (where they manage their WorldCat Local options).
- The library can set up their proxy server in the WorldCat knowledge base settings. The library can select and load other collections to their knowledge base if desired.
- OCLC notifies EBL to send data to OCLC reflecting the e-titles available to the library so OCLC can post them to the library’s knowledge base. EBL sends one feed of DDA titles that are available (but not purchased) and one feed of DDA titles that are purchased (via the DDA process or via firm ordering). Having two feeds will help with the library’s workflow for adding records in their local discovery interface. EBL sends data on a weekly basis.
- OCLC loads the feed into the library’s knowledge base. The “view now” link is now supported in WorldCat Local. The collections are refreshed weekly.
- The library turns on option in the knowledge base to set holdings in WorldCat at the institution level and then manages the setting (on/off) at the collection level for all of their collections. (There is a delay for holdings to be set.) WorldCat holdings are used in the WorldCat Local relevancy ranking.
- The library deflects ILL on all e-books by setting the option in the policies directory using format (e-audio/e-text/internet resource). The library also turns off ILL at the collection level.
- At a time in future when the library wants to remove unpurchased DDA, EBL can remove the titles in the knowledge base via the feed to OCLC, which will also result in deletion of WorldCat holdings.
- The library turns on MARC Record Delivery at the institutional level and then at the collection level. OCLC provides discovery records for the library’s local system. OCLC outputs files of WorldCat MARC records with localized URLs for new, updated, and deleted titles based on the feeds to the library’s knowledge base. Files of records are available for download from OCLC’s Data Exchange Server via the library’s FTP account. OCLC includes all titles from EBL, whether DDA or purchased. New titles are added to the WorldCat knowledge base weekly.


Find the contact information for OCLC Support in your region: [http://www.oclc.org/support/contact-support.en.html](http://www.oclc.org/support/contact-support.en.html)

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