



Remote Collection Maintenance

Reviewing your physical collection using custom reports and record sets

Grant Perrigo
Sno-Isle Libraries

Sno-Isle Libraries

Over 1 million
physical items

Floating

At a
Glance

24 Community
Libraries

500,000
Cardholders

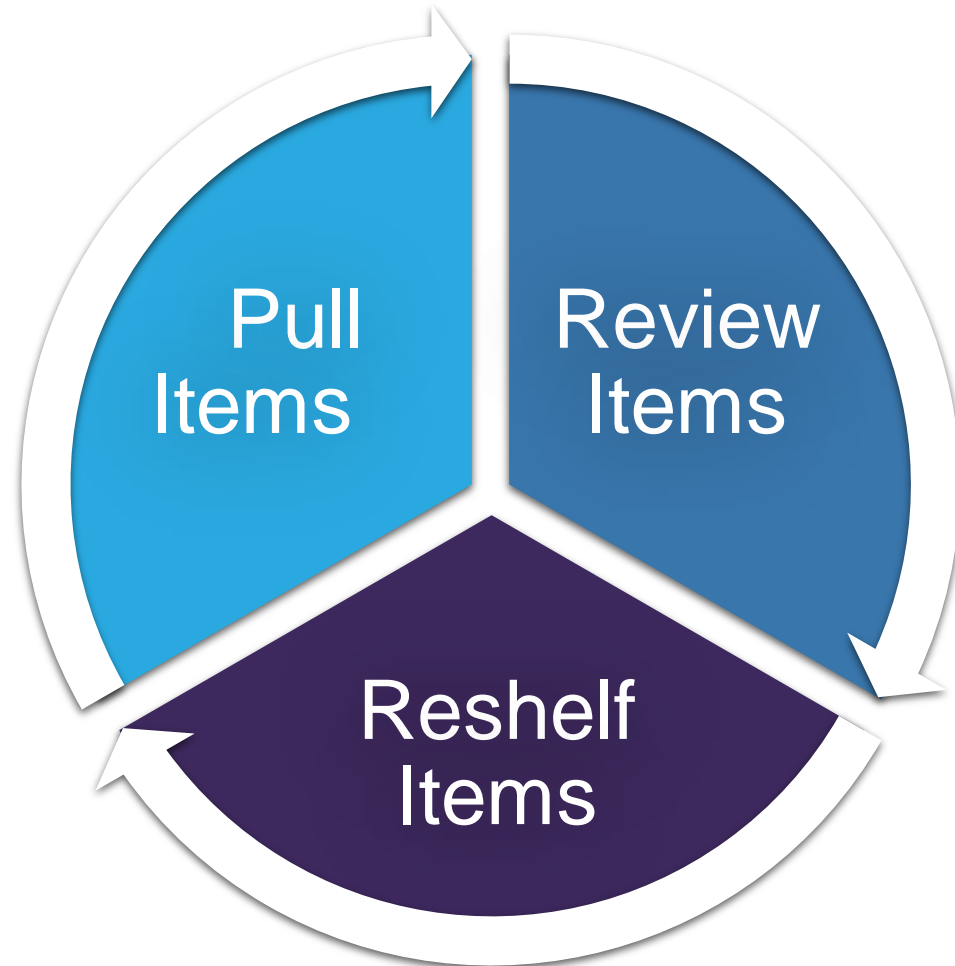
Collection Maintenance Plan

Schedule of
work

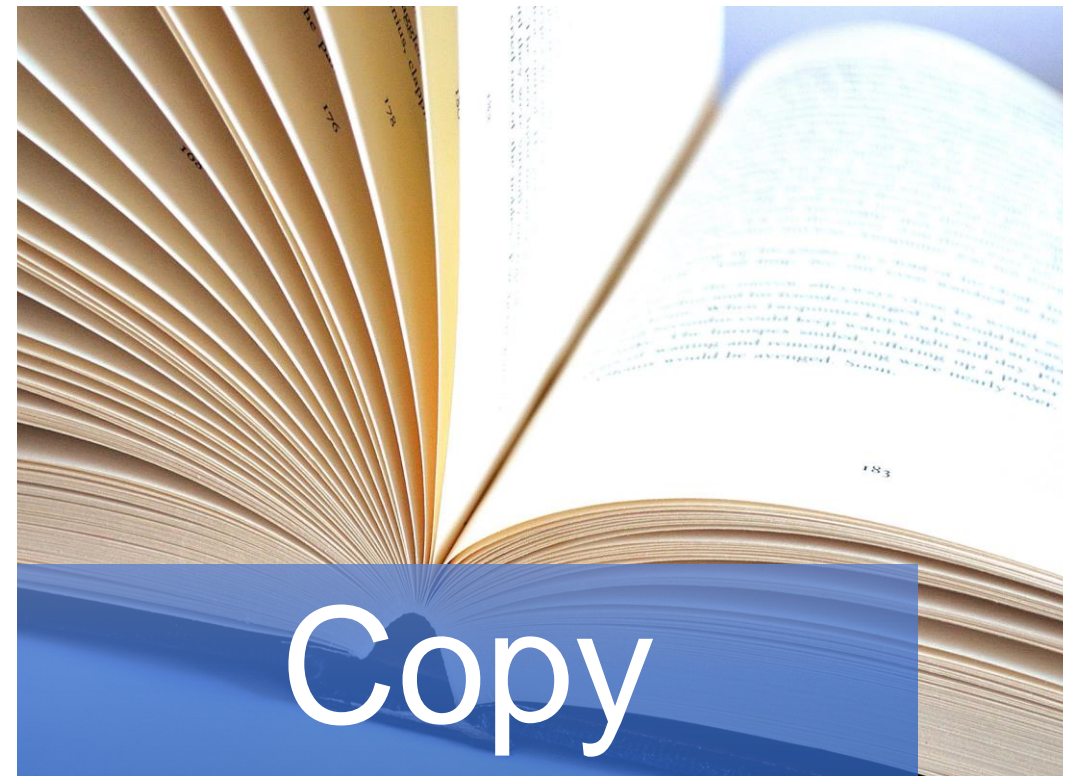
Not consistent

No tracking

Collection Maintenance Cycle



Collection Maintenance Cycle



Remote Collection Maintenance

Thorough

Efficient

Consistent

Remote Collection Maintenance



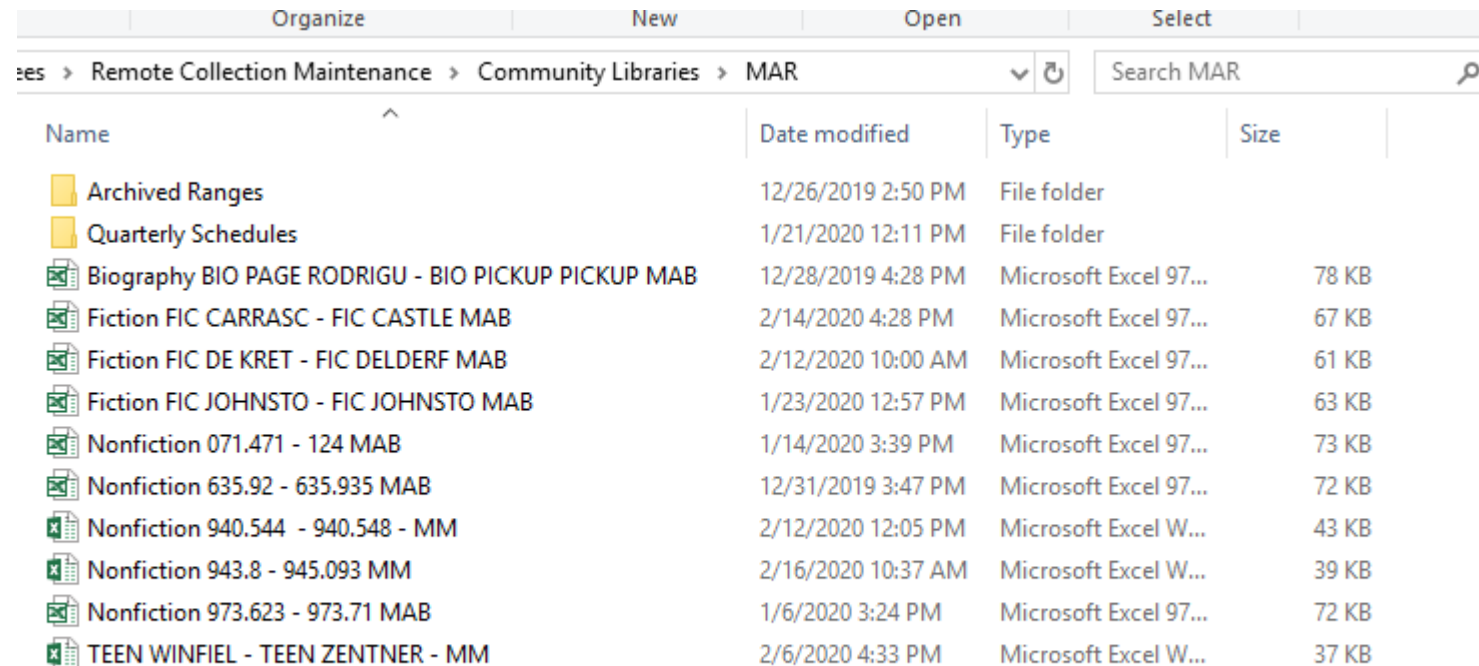
Remote Collection Maintenance

Review ENTIRE collection digitally



Remote Collection Maintenance

Use reports for statistical tracking and accountability



The screenshot shows a file explorer window with the following structure:

- Organize
- New
- Open
- Select

Navigation path: es > Remote Collection Maintenance > Community Libraries > MAR

Search: Search MAR

Name	Date modified	Type	Size
Archived Ranges	12/26/2019 2:50 PM	File folder	
Quarterly Schedules	1/21/2020 12:11 PM	File folder	
Biography BIO PAGE RODRIGU - BIO PICKUP PICKUP MAB	12/28/2019 4:28 PM	Microsoft Excel 97...	78 KB
Fiction FIC CARRASC - FIC CASTLE MAB	2/14/2020 4:28 PM	Microsoft Excel 97...	67 KB
Fiction FIC DE KRET - FIC DELDERF MAB	2/12/2020 10:00 AM	Microsoft Excel 97...	61 KB
Fiction FIC JOHNSTO - FIC JOHNSTO MAB	1/23/2020 12:57 PM	Microsoft Excel 97...	63 KB
Nonfiction 071.471 - 124 MAB	1/14/2020 3:39 PM	Microsoft Excel 97...	73 KB
Nonfiction 635.92 - 635.935 MAB	12/31/2019 3:47 PM	Microsoft Excel 97...	72 KB
Nonfiction 940.544 - 940.548 - MM	2/12/2020 12:05 PM	Microsoft Excel W...	43 KB
Nonfiction 943.8 - 945.093 MM	2/16/2020 10:37 AM	Microsoft Excel W...	39 KB
Nonfiction 973.623 - 973.71 MAB	1/6/2020 3:24 PM	Microsoft Excel 97...	72 KB
TEEN WINFIEL - TEEN ZENTNER - MM	2/6/2020 4:33 PM	Microsoft Excel W...	37 KB

Remote Collection Maintenance

Limit busy work



Remote Collection Maintenance

Create Ownership

Staff Item Not in Collection (SINC)

This form may be used to submit title or subject requests to selectors. Please complete one form for each title/subject request submitted. Holds will not be placed for titles requested.

* indicates a required field.

* Routing Information:

- Lorraine Burdick J & Teen print and media formats for ages 0 - 18, including eBooks and eAudio for J and Teen.
- Lisa Castrogiovanni Adult fiction, large print
- Karen Maland Periodicals
- Julie Thompson Adult Music CD, Adult DVD, OverDrive eBooks, OverDrive eAudio
- Darren Nelson Adult nonfiction, Adult audiobooks, International, Reference
- Anne Murphy Reference
- Grant Perrigo Adult and teen graphic novels
- Jackie Parker Book Discussion Kits

Title:

Author:

Publication Date:

ISBN:

Subject:

* Format: Book Music CD DVD Audio Book Other
If other, please specify:

* Staff Name:

* Community Library:

* Follow-up Needed: No Yes

Receipt: Would you like a copy of this submission emailed to you?
 No Yes

Notes:

To protect customer confidentiality, do not include customer information in this form.



#IUG2020



Remote Collection Maintenance

Planning and
Implementation

Process

Results



#IUG2020



Planning

Collaborate on
Process

Communication
Plan

Training Plan /
IT Backbone

Planning - Collaborate on Process

Build a working
group

Refine Process

Schedule

Planning – Communication Plan

Presentations

Email/Newsletter

In Person

Implementation – Training Plan

In-Person
Training / All
Librarian Staff

Updated
Collection
Maintenance
Guidelines

Three Month
Beta Period

Implementation – IT Backbone

Reports

Record sets

Implementation - Reports

Report Wizard - Remote Collection Maintenance Report

Parameters

Select Collection from Dropdown List

- Juvenile Graphic Novel
- Juvenile Large Type
- Juvenile Magazine
- Juvenile Nonfiction
- Large Type
- Magazine
- Newspaper
- Nonfiction**
- Readers
- Ready Reader Kits
- Reference
- Reference Ebook

Enter Beginning Call Number:

070.5109

Enter Ending Call Number:

101

Submit Cancel

ated

Implementation - Reports

A	B	C	D	E	F	G	H	I	J	K	L
Collection Maintenance Report for Fiction: FIC f to FIC fc											
BibID	Callno	Author	Title	PubYr	1st Avail	Last Chkout	PYCirc	Lifetime Circ	Items	Removed	Reassigned
1343946	FIC FABER	Faber, Michel, author.	The book of strange new things : a novel	2014	07/15/15	02/05/20	46	277	6		
1565169	FIC FABER	Faber, Michel.	The crimson petal and the white	2003	05/10/17	11/26/19	11	35	1		
1592185	FIC FABER	Faber, Sarah, author.	All is beauty now	2017	08/07/17	01/01/20	11	49	4		
1282341	FIC FABIANO	Fabiano, Laurie.	Elizabeth Street : a novel based on true events	2010	10/03/14	02/03/20	5	107	1		
1570820	FIC FABIASC	Fabiaschi, Abby, author.	I liked my life	2017	01/31/17	01/05/20	14	131	5		
1283000	FIC FABRY	Fabry, Chris, 1961-	Almost heaven	2010	03/28/11	06/10/19	4	180	4		
1295432	FIC FABRY	Fabry, Chris, 1961-	Not in the heart	2012	02/08/12	10/11/18		115	1		
1319376	FIC FABRY	Fabry, Chris, 1961-	Borders of the heart	2012	10/12/12	06/10/19	3	111	1		
1346079	FIC FABRY	Fabry, Chris, 1961-	The song	2014	01/28/15	05/23/19	2	92	2		
1352619	FIC FABRY	Fabry, Chris, 1961-	War room : prayer is a powerful weapon	2015	08/06/15	08/05/19	14	173	3		
1419602	FIC FABRY	Fabry, Chris, 1961- author.	The promise of Jesse Woods	2016	07/05/16	02/05/20	7	148	1		
1657258	FIC FABRY	Fabry, Chris, 1961- author.	Under a cloudless sky	2017	01/24/18	02/10/20	16	145	7		
1866888	FIC FABRY	Fabry, Chris, 1961- author.	Overcomer : a novelization	2019	07/31/19	02/12/20	26	30	3		
1338940	FIC FACEOFF		Faceoff	2014	10/17/17	01/31/20	27	1237	14		
1287599	FIC FACKLER	Fackler-Sinkóvitz, Elizabeth, 1947-	Breaking even	1998	03/28/11	10/17/19	2	119	1		
1866788	FIC FADER	Fader, Molly, author.	The McAvoy sisters book of secrets : a novel	2019	07/30/19	02/10/20	15	19	2		
1296079	FIC FAGAN	Fagan, Jenni, author.	The sunlight pilgrims	2016	07/22/16	05/02/19	2	70	3		
631701	FIC FAGAN	Fagan, Jenni.	The panopticon : a novel	2013	08/20/13	01/11/20	3	65	3		
1486483	FIC FAHERTY	Krotow, Geri, author.	Her secret Christmas agent	2016	12/07/16	06/03/19	1	23	2		



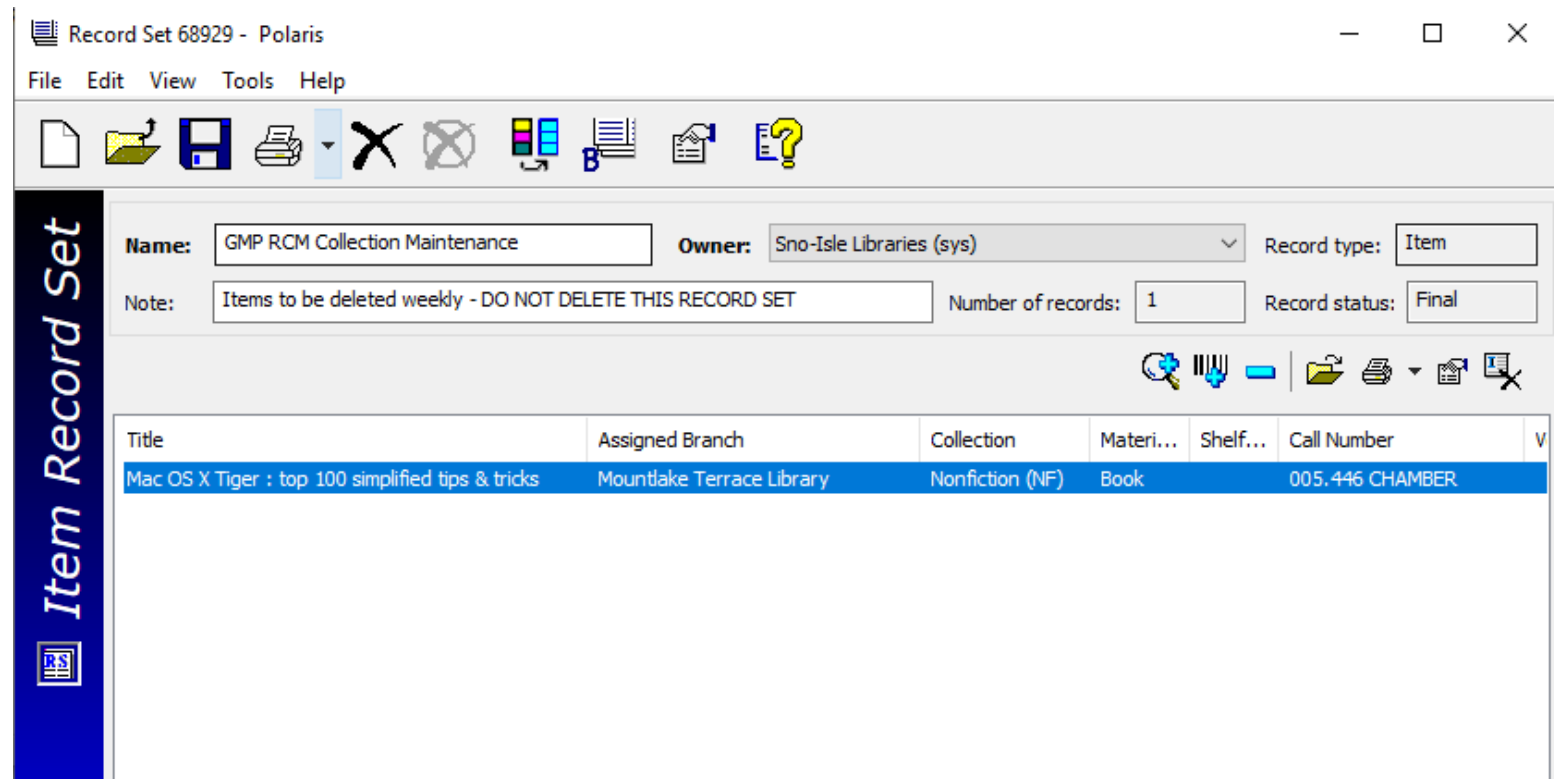
#IUG2020



Implementation – Record sets

Consistent
naming
conventions

Dynamic
processes



The screenshot displays the 'Record Set 68929 - Polaris' window. The interface includes a menu bar (File, Edit, View, Tools, Help) and a toolbar with various icons. The main area contains form fields for 'Name', 'Owner', 'Record type', 'Note', 'Number of records', and 'Record status'. Below these fields is a table with columns for 'Title', 'Assigned Branch', 'Collection', 'Materi...', 'Shelf...', and 'Call Number'. A vertical sidebar on the left is labeled 'Item Record Set'.

Title	Assigned Branch	Collection	Materi...	Shelf...	Call Number	V
Mac OS X Tiger : top 100 simplified tips & tricks	Mountlake Terrace Library	Nonfiction (NF)	Book		005.446 CHAMBER	

Implementation – Record sets

Record Set 37625 - Polaris

Name: BRI Collection Maintenance Owner: Sno-Isle Libraries (sys) Record type: Item

Note: Items to be deleted weekly - DO NOT DELETE THIS RECORD SET Number of records: 0 Record status: Final

Title	Assigne...	Collec...	Materi...	Shelf...	Call N...	Vol...	Status	Barcode	Last Activity ...	R...	Control...

0 of 0 record(s) retrieved

Record Set 38391 - Polaris

Name: BRI Reassignment Owner: Sno-Isle Libraries (sys) Record type: Item

Note: Items to move to the library assigned below - DO NOT REMOVE THIS RECORD: Number of records: 1 Record status: Final

Title	Assigne...	Collec...	Materi...	Shelf...	Call N...	Vol...	Status	Barcode	Last Activity ...	R...	Control...
Nothing happened	Lynnwo...	Teen ...	Book		TEEN ...		Shelf	39067068089253	6/22/2018	F...	4099279

1 of 1 record(s) retrieved



#IUG2020



Implementation – Discards

Title:	The healthy kitchen : recipes for a better body, life, and spirit	Find	Bib control number:	44395
Author:	Weil, Andrew.	Parent item:	Item control number:	299745
Call number:	LGE-TYPE 641.563 WEIL	Price:	Issue control no.:	
Owner:	Mill Creek Library (br) ▼	Shelf location:	Discard ▼	
Assigned:	Service Center (SRV) ▼	Temporary location:		
Collection:	Large Type (LT) ▼	Circulation status:	Out ▼	1/24/2020 1:04:09 PM

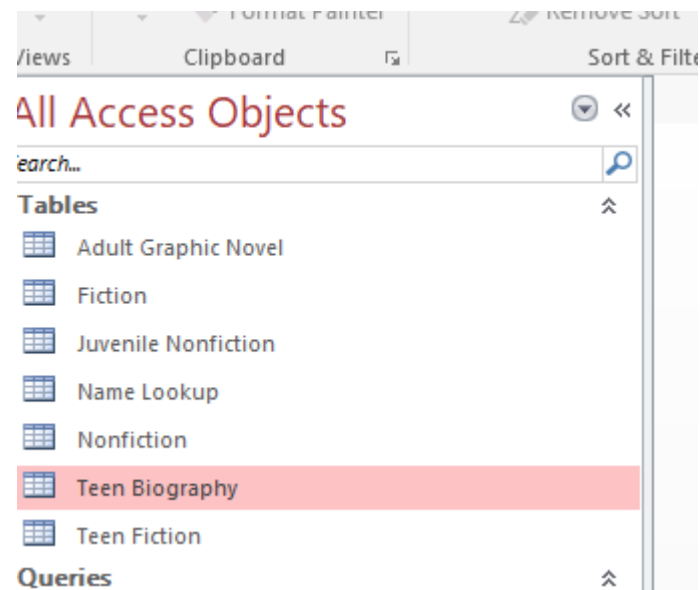
Process – Ranges/Tracking

B5549										
FIC ZUB										
	A	B	C	D	E	F	G	H	I	J
1	AssociatedBibRecord	BrowseCallNumb	CutterNumb	Sort 1	Sort 2	Sort 3	sort 4	sort 5		
2	1460306	FIC A FORCE	A FORCE	FIC A FORCE	FIC A FORCE	FIC A FOR	FIC A FORCE		FIC A FORCE - 1	190
3	150160	FIC AARON	AARON	0	1	1		1	FIC A FORCE	
4	165291	FIC AARON	AARON	0	2	1		1	1	
5	165292	FIC AARON	AARON	0	3	1		1	2	
6	183228	FIC AARON	AARON	0	4	1		1	3	
7	219308	FIC AARON	AARON	0	5	1		1	4	
8	238716	FIC AARON	AARON	0	6	1		1	5	
9	474252	FIC AARON	AARON	0	7	1		1	6	
10	820173	FIC AARON	AARON	0	8	1		1	7	
11	987351	FIC AARON	AARON	0	9	1		1	8	
12	1044270	FIC AARON	AARON	0	10	1		1	9	
13	1229571	FIC AARON	AARON	0	11	1		1	10	
14	1229572	FIC AARON	AARON	0	12	1		1	11	
15	1229573	FIC AARON	AARON	0	13	1		1	12	
16	1231213	FIC AARON	AARON	0	14	1		1	13	
17	1279493	FIC AARON	AARON	0	15	1		1	14	
18	1281432	FIC AARON	AARON	0	16	1		1	15	
19	1288762	FIC AARON	AARON	0	17	1		1	16	
20	1288778	FIC AARON	AARON	0	18	1		1	17	
21	1294683	FIC AARON	AARON	0	19	1		1	18	
22	1295422	FIC AARON	AARON	0	20	1		1	19	



Process – Ranges/Tracking

	A	B
1	Collection	Range
2	Fiction	FIC PARSIPU - FIC PAVONE
3	Fiction	FIC GIRZONE - FIC GOLDBER
4	Fiction	FIC BULLING - FIC BURTON
5	Fiction	FIC RAWLIK - FIC REED
6		
7		
8	Juvenile Nonfiction	J 745.0952 - J 745.54
9	Juvenile Nonfiction	J 794.8 - J 796.3326
10	Juvenile Nonfiction	J 598.8 - J 599.3709
11		
12		
13	Adult Graphic Novel	FIC RESURRE - FIC SAMURA
14	Adult Graphic Novel	FIC BEACHAM - FIC BUNN
15		
16		
17	Teen Fiction	TEEN CLIPPIN - TEEN CORNWEL
18	Teen Fiction	TEEN GODFREY - TEEN GREGORI
19		
20		
21	Nonfiction	613.26 - 613.2852
22	Nonfiction	378.362 - 381.4574
23	Nonfiction	598.6517 - 599.643
24	Nonfiction	747.92 - 748.5092
25	Nonfiction	813.609 - 814.6



Results – Librarian Involvement

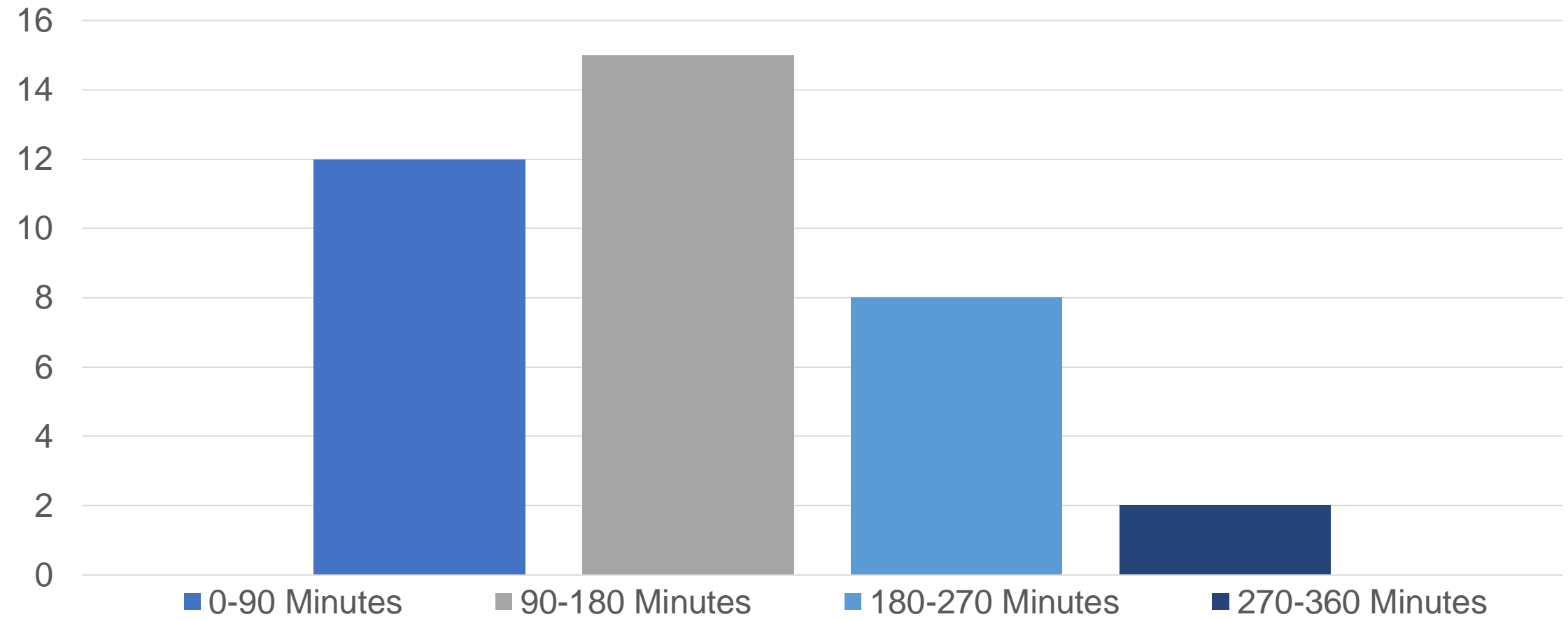
Staff Request
an Item Not in
Catalog (SINC)

3,000 over the
year

100% Increase

Results – Librarian Time

Time Spent on Ranges



Results – Collection

158,719
Titles

497,342
Items

20,675
Removed

23,475
Reassigned

Going Forward

Commitment to
Training

Evaluation of
process

Adjustments of
Guidelines

Thank you

Questions?

