





#### What we'll cover . . .

- A new approach to collections more than just weeding
- Data about your collection
- Tools to harvest, manipulate, and share data
  - With your III products
  - Auxiliary tools
  - Proprietary tools
- Scenarios for practice





#### Street cred

- Twenty years in academic libraries that use Innovative products
  - From character-based to Millennium and now Sierra
  - Small to mid-size universities
  - Mostly in technical services that required knowledge of all ILS tasks/modules/functions other than circulation
- Current renovation project and other smaller adjustments to the collection; earlier closing of a branch library
- Recent participation in regional shared print project





### Why collection adjustment?

Adjustment is not necessarily weeding, though both refer to managing the size of the collection (physical or not)

#### Examples of adjustment:

- Offsite storage
- Merged collections
- Replacement with non-print format
- Resource-sharing programs





# Scale and triggers are key elements of adjustment

- No longer just a regular and/or mediated process of removing worn, misleading, trivial, irrelevant, and commonly held resources
  - ex. MUSTIE; CREW
- Can include more than just print books and journals
- May represent significant percentages of the collection
- May reflect mandates from beyond the library





#### A rose by any other name . . .

Whatever we call it, the removal of material from

a library's onsite collection can still be fraught with

the emotions, politics and sometimes outrage of users.





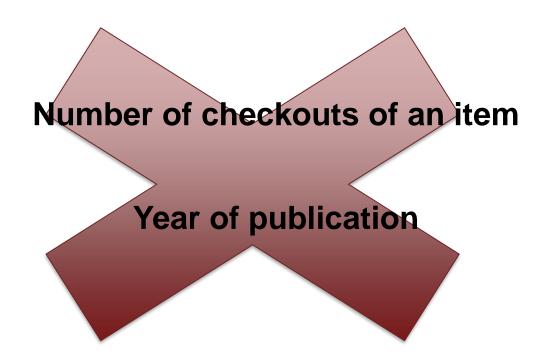
# Sensible and defensible collection adjustment is possible by:

- Identifying meaningful data
- Harvesting data into tools that can manipulate data for easier use
- Sharing the ability and responsibility to review and respond to the harvested data





# Sensible and defensible collection adjustment no longer means withdrawing based solely on:







#### **Collection Adjustment Administration**

- Familiarity with the ILS and other content management solutions (knowledgebase, bibliographic utilities, etc.)
- But not exclusive. Share the work!





#### Let's start with the data

#### Know the possibilities

Identify and get to know ILS fields for bibliographic, order, item, and holdings/checkin records

- Hardcoded
- Customizable
  - the local choices

Key fields to consider			
Field	Record Type		
Date Created	Any		
Last Updated	Any		
Material Codes	Bib, item, order		
Checkout	Item		
Volume	Item		
Fund	Order		
Etc.			

IUG2019

Phoenix, AZ



#### Customizable local ILS data = IMPORTANT!

What kinds of data were implemented?

ex. more granular item locations; shared print; govdocs; gifts

How might this information help your project?







# Common III Tools for harvesting, manipulating, and sharing data\*

- Create Lists / Review Files
  - Basic functionality
  - More advanced features
    - Import
    - Grouping
    - Regular expressions
- Statistics
- Web Management Reports
- Decision Center \$\$\$/???



## Auxiliary Tools To Create or Manipulate ILS Data

Excel / Google Sheets

Notepad or other text editor

Barcode scanner

Linear feet to volumes formula

MarcEdit, etc.





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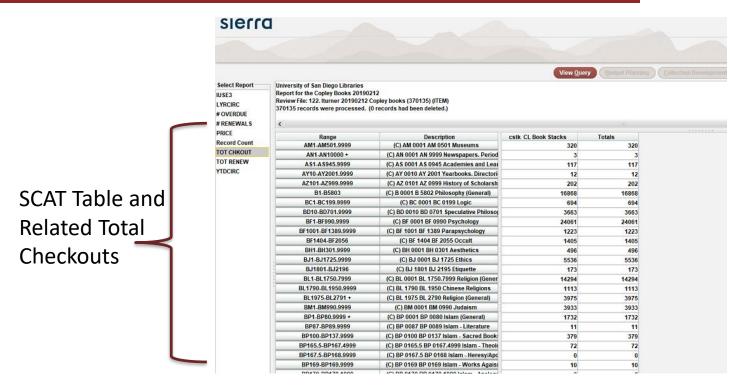
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#### **Example of Statistics – can export!**







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## **Web Management Reports**

	Α	В	С	D	Е	F	G	Н
1	CIRCL	JLATION .	ACTIV	ITY by ITE	M LC	CATION	N (Jul 17-	Jun 18)
2	LOC	CHKOUTS	CHKINS	RENEWALS	HOLDS	HI/RECLL	TOTAL#	PERCENT
3	art1	630	615	595	0	0	1,840	1.4%
4	ats1	1,312	1,315	59	0	0	2,686	2.1%
5	ats2	363	362	1	0	0	726	0.6%
6	c106	22	22	4	0	0	48	0.0%
7	castr	1,791	1,786	14	0	0	3,591	2.8%
8	cblue	11	13	3	7	0	34	0.0%
9	cbray	2	2	0	0	0	4	0.0%
10	ccd	23	24	10	17	0	74	0.1%
	ccirc	10,151	10,064	43	1	0	20,259	15.6%
12	cdvd	695	694	275	165	7	1,836	1.4%
13	cequ	2,529	2,522	30	0	0	5,081	3.9%
14	cfile	0	0	0	1	0	1	0.0%
15	cfilm	7	7	0	0	0	14	0.0%
16	clpop	301	300	33	3	0	637	0.5%





# Common III Tools for harvesting, manipulating, and sharing data\*

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  - More advanced features
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## Auxiliary Tools To Create or Manipulate ILS Data

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### A tip for sharing the work

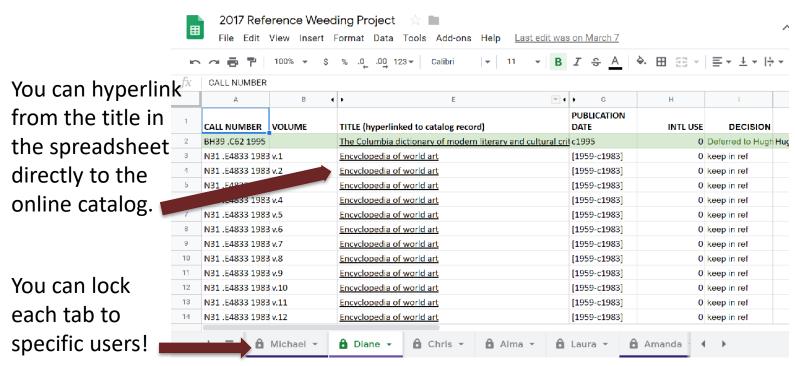
See the PowerPoint appendix for a short intro into creating reports in Excel (or Google Sheets) that hyperlink from Excel to the OPAC.

Share the effort!





#### **Using Google Sheets for Collaboration**







### Other proprietary tools to consider

OCLC WorldShare Collection Manager

- OCLC/SCS GreenGlass
- Choice Reviews Online
- GOBI
- etc.





#### Let ILS data be your guide . . .

Most collection adjustment projects feel overwhelming at first . .

so think of the end result as a mystery that has to be solved.







#### **SCENARIO 1**

Your library supports a small, private undergraduate campus. Your college is affiliated with the United Methodist Church, and the library has long been admired regionally for its robust collection of religious materials. You've just been asked to clear out half of the reference collection of 8,000 volumes to make room for a makerspace station. With a formula of 8 volumes per linear feet in reference, you decide you need to move 4,000 volumes out to accommodate the request. Your library does not circulate reference books but does keep track of inhouse use. No large-scale mediated reference weeding has been done in over a decade because of staff shortages. You have two months to complete this project and you will be working with the head of reference, who does not use Sierra. You've had the III ILS for 8 years.



### Data to consider (examples)

- Format (print serial / print monograph)
- Classification breakdown (especially for religion)
- Inhouse usage
- Large sets / dated serials
- Date Added / Publication Year vis-à-vis eight years worth of data





#### **ILS Data to Consider – Print Monographs**

SIERRA CREATE LISTS BOOLEAN SEARCH				
STORE RECORD TYPE	ITEM			
RANGE/REVIEW/ INDEX/ADVANCED	RANGE – ALL ITEMS			
CLASSIC TAB				
(OPERATOR)		AND	AND	
ТҮРЕ	ITEM	ITEM	BIBLIOGRAPHIC	
FIELD	LOCATION	STATUS	MAT TYPE	
CONDITION	=	MATCHES	=	
VALUE A	CREF	[!#%&()+-@oqtx]	PRINT BOOK	
VALUE B				





## **Exporting from the ILS**

SORT: (B) call number, (I) volume

EXPORT:

TYPE	FIELD
BIB	RECORD NUMBER
ITEM	RECORD NUMBER
BIB	CALL NUMBER
ITEM	VOLUME
BIB	<b>245</b>  a
BIB	260 c
BIB	CREATED DATE
ITEM	INTL USE
ITEM	barcode number
?	?





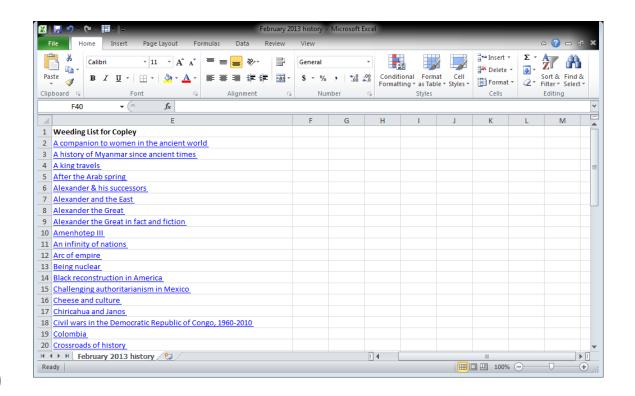
#### What this spreadsheet will give us:

- Easy way to create a spreadsheet for head of reference that is hyperlinked to the public catalog (they don't need Sierra!)
- Two ways to import record numbers back into Create List with record numbers to create more refined lists
- Call number and volume info and item barcode number to serve as a pull-list
- Pub year + date added + total inhouse use
- Big sets that might be worth removing





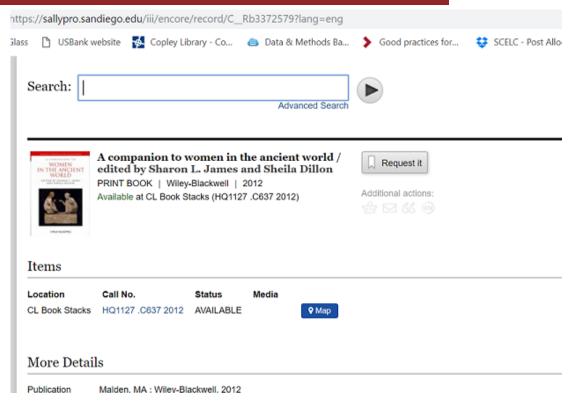
# Example – Hyperlinked Report (see appendix for steps)







# Example – Anyone can click on a hyperlinked title in the spreadsheet to access the OPAC







#### **ILS Data to Consider – Print Serials**

SIERRA CREATE LISTS BOOLEAN SEARCH			
STORE RECORD TYPE	ITEM		
RANGE/REVIEW/ INDEX/ADVANCED	RANGE – ALL ITEMS		
CLASSIC TAB			
(OPERATOR)		AND	AND
ТҮРЕ	ITEM	ITEM	BIBLIOGRAPHIC
FIELD	LOCATION	STATUS	MAT TYPE
CONDITION	=	MATCHES	=
VALUE A	CREF	[!#%&()+-@oqtx]	PRINT SERIAL
VALUE B			





## **Exporting from the ILS**

• SORT: (B) call number, (I) volume

EXPORT:

TYPE	FIELD
BIB	RECORD NUMBER
ITEM	RECORD NUMBER
BIB	CALL NUMBER
ITEM	VOLUME
BIB	<b>245</b>  a
BIB	DATE CREATED
CHECKIN	holdings statement
ITEM	INTL USE
ITEM	barcode
?	?





#### What this spreadsheet will give us:

- Easy way to create a spreadsheet for head of reference that is hyperlinked to the public catalog (they don't need Sierra!)
- Two ways to import record numbers back into Create List with record numbers to create more refined lists
- Call number and volume info and item barcode number to serve as a pull-list
- Pub year + date added + total inhouse use
- Possibly old retention decisions that have been ignored





#### **SCENARIO 2**

Your library of 600,000 print monographs supports a medium-size state university that emphasizes undergraduate liberal arts and has strong graduate programs in performing arts, marine biology, and neuroscience. You've been an III ILS customer since 1991. The library recently joined a regional shared print initiative for monographs and is retaining 60,000 print monographs as part of your participation, noted in a 583 bib field. The library has added a significant number of donations over the years that are coded in an ICODE1 field. In preparation for renovating the library, the university wants the library to reduce the physical collection by 100,000 print monographs and move 200,000 volumes of the remaining print monograph collection to new offsite storage that the university just acquired. You need to involve the university faculty in your decisions of what to remove. The library has 8 months (including 3 summer months) to prepare for the reduction and the move.



### Data to consider (examples)

- Format maybe by item location code (if it signifies format)
- Classification breakdown (tricky either specialized or interdisciplinary)
- Created Date / Pub Year / Total Checkouts
- 583 bib field for shared print commitments
- ICODE 1 for gifts





#### **ILS Data to Consider**

SIERRA CREATE LISTS BOOLEAN SEARCH			
STORE RECORD			
ТҮРЕ	ITEM		
RANGE/REVIEW/ INDEX/ADVANCED	RANGE		
CLASSIC TAB			
(OPERATOR)		OR	AND
ТҮРЕ	(ITEM	ITEM	ITEM
FIELD	LOCATION	LOCATION	STATUS
CONDITION	=	=	MATCHES
VALUE A	СЅТК	COVER)	[!#%&()+-@oqtx]
VALUE B			





## **Exporting from the ILS**

• **SORT:** (B) call number, (I) volume

EXPORT:

ТҮРЕ	FIELD
BIB	RECORD NUMBER
ITEM	RECORD NUMBER
BIB	CALL NUMBER
ITEM	VOLUME
BIB	<b>245</b>  a
BIB	260 c
BIB	CREATED DATE
BIB	583
ITEM	ICODE1
ITEM	тот снкоит
ITEM	barcode





#### What this spreadsheet will give us:

 Easy way to create a spreadsheet for faculty review that is hyperlinked to the public catalog (they don't need Sierra!)

 Two ways to import record numbers back into Create List with record numbers to create more refined lists

Call number and volume info and item barcode number to serve as a pull-list





#### What this spreadsheet will give us (cont'd):

Pub year + date added + total checkouts

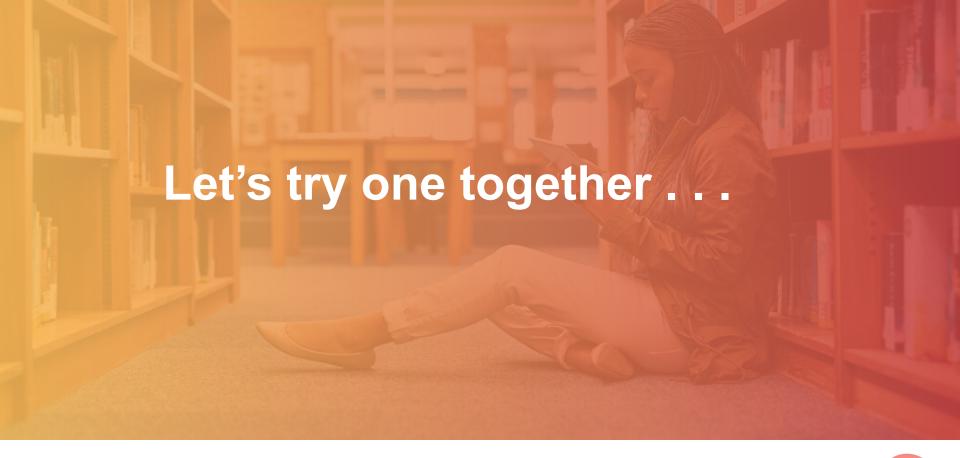
Large sets that might not be analyzed and are worth removing (or analyzing if you want to keep them)

All items of the shared print commitment to keep them from being weeded

 All gift items and when they were added – a consideration since they aren't necessarily firm orders from faculty

Phoenix.









#### **SCENARIO 3**

Your branch library of 200,000 print monographs and serials supports the undergraduate allied health program at a mid-size private university. The school has a strong sports medicine and athletic training program. The library has been an Innovative ILS customer since 2001. The library's two subject specialists regularly cull the monographic collection for dated material, but no effort has been made to review monographic or serial overlap with the main library. When possible, print serials have been switched to online only. The nearby state university has a medical program, and you participate with them in a resource-sharing arrangement for monographs. Your university wants to remove 50,000 volumes (serials or monographs) to create space for a new allied health lab. You've identified several ebook packages with Proquest and Elsevier that could replace some of your print monograph content. These vendors will help identify overlap with your existing titles and you expect to target around 25,000 print titles that could switched to online. The library has a semester to prepare for the reduction.



### **Data to consider**

<YOUR IDEAS>





### My "Universal Truths" in Collection Adjustment

- We don't always have the luxury of time.
- We can't always get our message across.
- Our colleagues often have other motivations and interests.
- Sometimes in the end our work is disregarded for "political" reasons.

#### **BUT**

That work still provides a sensible AND defensible argument for our efforts.





# Thank you!

Questions?











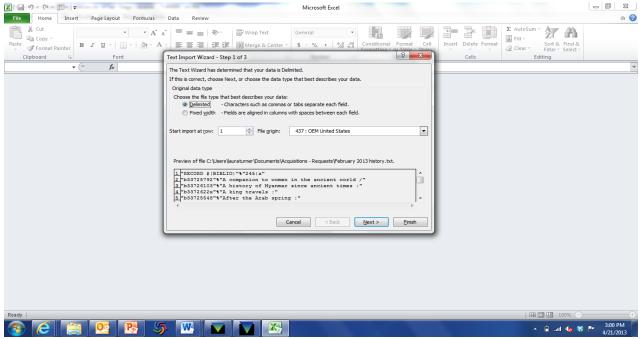
### **Preparing a Hyperlinked Report**

- From Create Lists, select Record type as Bibliographic and search Range of records fitting your criteria (call number area, location, etc.)
- Sort according to your needs and export bibliographic record number and title (245|a) from Millennium/Sierra to Excel (can export other fields as well for future reference)
- Strip out bib record number check digit and hyperlink title with bib record number for OPAC access (can do manually or program an Excel VBA macro to do this)





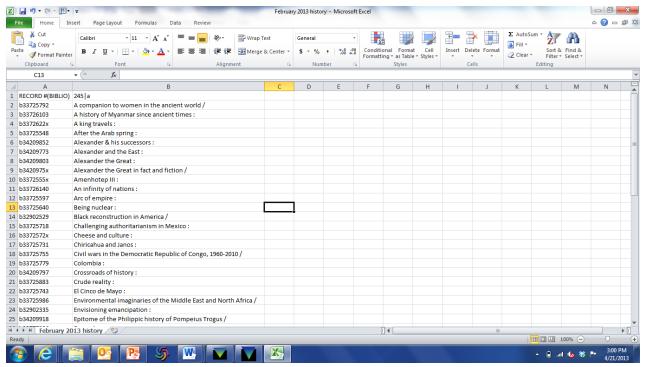
# **Example – Preparing a Hyperlinked Report: Opening the Create Lists File in Excel**







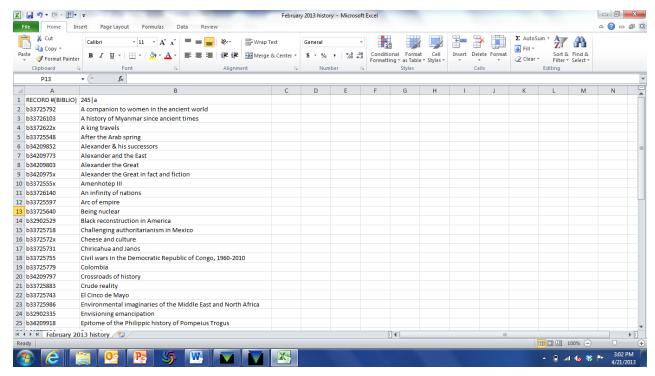
## Example – Preparing a Hyperlinked Report: Raw data in Excel







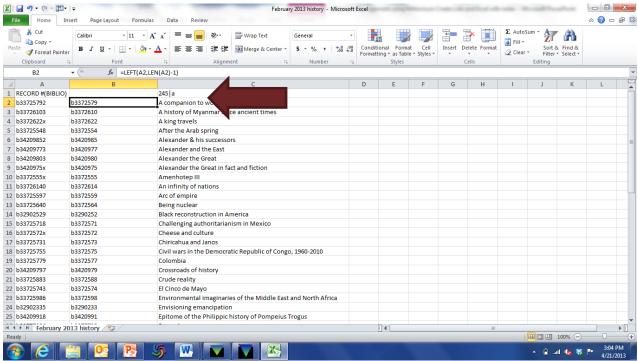
# Example – Preparing a Hyperlinked Report: A little bit cleaned up in Column B







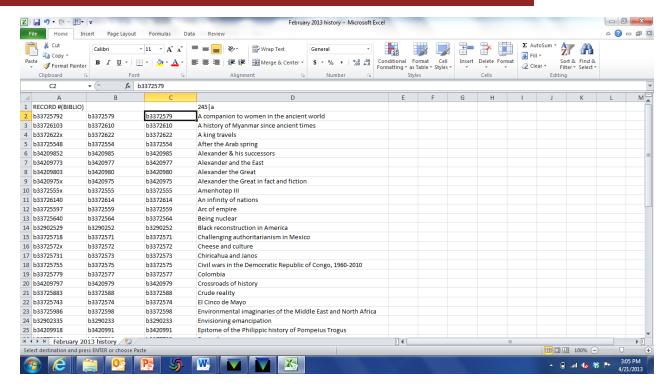
## Example – Preparing a Hyperlinked Report: Insert a new column B and strip the bib record # check digit







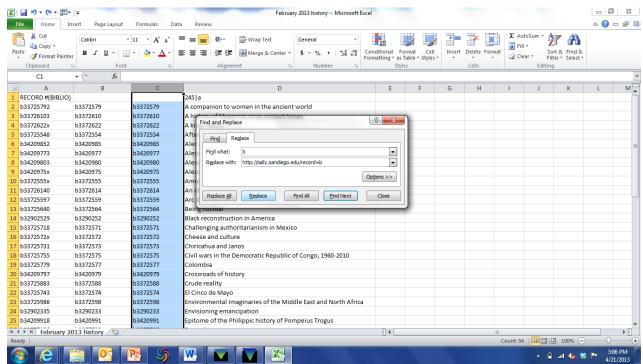
### Example – Preparing a Hyperlinked Report: Insert a new column C, copy column B and "paste-special-value" into column C







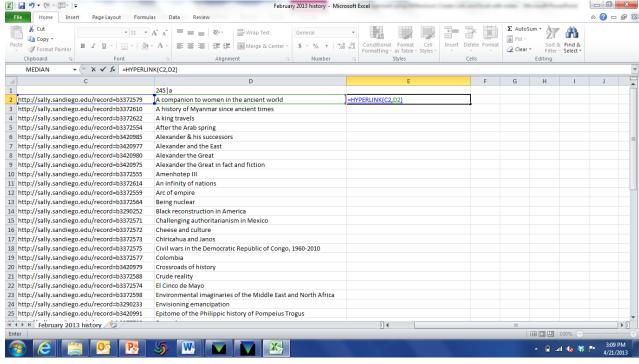
### Example – Preparing a Hyperlinked Report: Add the base URL for OPAC to the value in column C using the Excel Replace tool







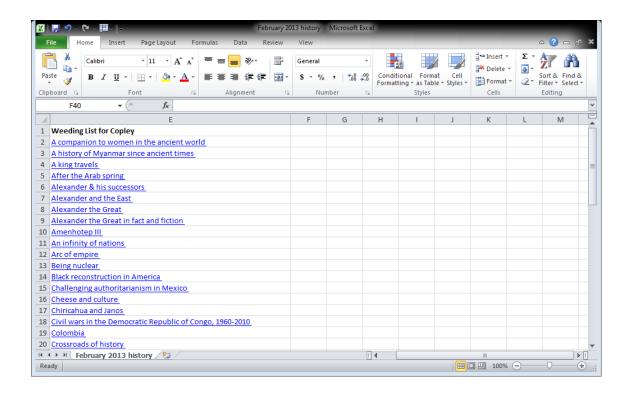
### Example – Preparing a Hyperlinked Report: In new column E, add hyperlink formula for URL in column C to the title in column D







# Example – Preparing a Hyperlinked Report: Hide any other columns except the hyperlinked title







## Example – Preparing a Hyperlinked Report: Click on a hyperlinked title in the spreadsheet to access the OPAC

