What has the Library bought for you lately?

A New Titles Index and Sub-base for the OPAC

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The Need: "a new titles list"

Traditionally, librarians have made lists of newly received titles for their users.

Problems with lists:

– Staff time intensive to produce and distribute

– Instantly out of date

– Your last list is always too broad or to specific to satisfy the next user

The Solution: "New Titles" sub-base

User empowerment – do it yourself 'lists' using the searching features of the OPAC

– **Staff time freed up from list making**

– **Results are always current**

– **As broad or specific as the user wishes**

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3

Building a "New Titles" sub-base

- **Step 1 – marking titles as 'new'**

- **Step 2 – creation of an accession index and from it, a New Titles sub-base**

- **Step 3 – integrating 'new titles' options into the OPAC**

- **Step 4 – keeping the New Titles sub-base on a roll (we have a moving 6 months)**

Step 1 – Marking titles as "new"

McGill's Decisions:

o **Use the accession date field in the item record, and index it**

o **Add the accession date automatically, according to the item's status changes**

o **Protect the accession date from change**

Why use the Accession Date field ?

Why did we not use the CAT or a locally added field in the BIB records?

- McGill loads bib/order records from BNA's Collection Manager. We did not want things 'on order' or still 'in processing' to show up in the new titles base.

Why automate the addition of the Accession Date?

- To avoid adding to processing or cataloguing staff's workflow

- To avoid inappropriate 'new' entries and data entry errors (e.g. incorrect dates)

The Accession date field - renamed from "Inventory date"

Preparing for our new accession dates

- **Via SQL, we removed the existing accession numbers and dates from all the item records.**

- **We ran an 'initial seed' job to add accession dates back to June 1, 2003 (start of our statistical year.)**

- **30,000 items were given accession dates (June to December).**

Production: Daily job to add Accession Dates

- **Accession Dates are added by a daily SQL job**

- **The job selects the items updated 'today and yesterday' with an process status of blank and no inventory date.**

- **The job then examines the item history table (Z30H)**
  - **checks for the initial switch from a ordering processing status to 'blank' (OI , OR , IP ==>TR ==> blank – we use tab42)**

- **Items are "returned" by processing dept => TR, so the switch to 'blank' occurs as the new books are unpacked by the branch library, scanned, and put on New Books shelf.**

- **The SQL job also adds the record numbers to the Z07 queue so that they get indexed.**

SQL Magic by Anca Coza

Three jobs in the new titles 'suite':

SQL

- Daily job, run at 7 p.m.

- Weekly job, to catch special cases.

  (Daily job cannot detect items going from IP->blank->SB on the same day)

- Gifts job, to catch miscoded (initial blank) gifts.

  One workflow change: 'orders' for gifts are now given initial order status of WP (waiting for processing).

Problems uncovered

- **Accession dates could be adjusted –**

We added the trigger to protect them

- **If staff deleted an entry in the item history table, it caused false positives in new titles –**

We added security to prevent staff from deleting item history entries

- **If an item is deleted, the sequence number is re-used when another item is created. Result: inappropriate item history attached to new item.**

Reported to Ex Libris. PRB7894 Solution: the program now looks for the highest-numbered z30 *or* z30h

14.2 rep_change 4257
Still awaiting 15.2 and 15.5 rep_changes.
16.02 rep_ver 7333

Step 2 - Creating the accession index

- Use expand_doc_bib_z30 to create a virtual field for indexing and display

- Tables involved:
  - expand_doc_bib_z30
    - N z30-inventory-number-date   z zero   X

    (N = COPY not ISSUE items…)
    - Program creates Z30-1 (for copy items) or Z30-2 (for issue items)

    So, the line above results in a field such as this:
      Z30-1 L $$z20031203

  - tab_expand
    - WORD   expand_doc_bib_z30
    - WEB-FULL   expand_doc_bib_z30
    - TAB33-DOC expand_doc_bib_z30
    - U39-DOC   expand_doc_bib_z30

Creating an accession index (2)

Index the Z30-1 $$z fields into a keyword index – we created one called WNW

- **add to tab11:**
  11 W Z30##   z   01 B   WNW

- **add to tab00 :**
  H WNW   W-032   04 00   0030   WNW [accession date]

- **add to pc_tab_sear:**
  FI MGU01   L New Titles Accession date   WNW

Displaying the Z30 accession date field

- **add to tab01.eng:**
  D Z30-1   00 0000   Z30-1 LItem Info

- **add to edit_doc.999:**
  ## Z30-1   z D LAccession Date   Y   E   W

- **add to edit.field.eng:**
  ! Z30-1 on Nav map - only subfield z - accession date
  1 L Z30-1 # B
  2   z

Step 2 – Create the New Titles sub-base

- **add to tab_base.eng:**

! New Titles base - rolling 6 months
NEW   New Titles   MGUSB MGU01   MGU01 (wnw=2003? or wnw=2004?) not (wnw=200306? or wnw=200307? or wnw=200308? or wnw=200309? or wnw=200310? or wst=deleted or wst=suppressed)

- **Check for typos with Util H 1 10 – the Z0102 Setup checker**

```
NEW |939471433|  ← if any sub-base's #DOCS looks
                     like this, fix tab_base.eng
```

- **add to tab_base_z0102, or in version 15.2 and up, specify in column 8 of tab_base.eng whether you want z0102 records to be built for this base**

Keep sub-base counters up to date

- The logical base counter is **not** automatically updated. Rather, when a heading is updated, the Z01-UPDATE-Z0102 field of the heading's record is set to 'Y'.

- **In version 14.2:** p_manage_34, the "Update Counters for Logical Bases" batch procedure updates the Z0102 table for those headings where Z01-UPDATE-Z0102 = 'Y'. It should be run nightly (it locks the queue, but not the library). So add to the job_list:

  W3 21:00:00 Y   MGU01 p_manage_34   MGU01,0,00,

- **In version 15:** (rep_ver 3310) updating the Z0102 counter is part of UE_08. See PRB 4425

Step 3 – adding New Titles to OPAC

Date range buttons (used on our opening screen of the New Titles Catalogue) – watch coding:

```
<a href="&server_f/?func=find-
   c%26ccl_term%3Dwnw%3D&DATE-
   D007%2D%3E&DATE">7 Days</a>
```

interpreted:
```
<a href="&server_f/?func=find-
   c&ccl_term=wnw=&DATE-
   D07->&DATE">7 Days</a>
```

OPAC's Quick search button:
New titles added in last 30 days

<include>new-titles-link
on opening screen of appropriate catalogues (sub-bases)

<!-- filename: new-titles-link -->

<p class="newbooks">
New Titles added to &f-base in the last 30 days
</p>

<p>Read more about the New Titles Catalogue</p>

OPAC -add new titles limit to find-a (advanced keyword)

```
<fieldset><legend>Limit your search using the options
    below:</legend>
<input type="hidden" name="request_op" value="AND" />
<input type="hidden" name="find_code" value="WNW" />
<br />
<label for="daterange">Titles added in the last:</label>
<select id="daterange" name="request">
<option value="&DATE-D007->&DATE">7 Days</option>
<option value="&DATE-D014->&DATE">14 Days</option>
<option value="&DATE-D021->&DATE">21 Days</option>
<option selected="selected" value="&DATE-D030->&DATE">30
    Days</option>
<option value="&DATE-D060->&DATE">60 Days</option>
</select>
```

OPAC - add limit to short-filter

```
<h3>Limit to New Titles</h3>
<form method="get" class="searchform" id="newtitlesbyrange" action="&server_f">
<div>

<input type="hidden" name="func" value="find-a" />
<input type="hidden" name="request" id="firstterm" size="25" />
<input type="hidden" name="find_code" value="SET">
<input type="hidden" name="request" value="$0100">
<input type="hidden"name="request_op" value="AND" />
<input type="hidden" name="find_code" value="WNW" />
<br />
<label for="daterange">Select titles added in the last:</label>
<select id="daterange" name="request">
<option value="&DATE-D007->&DATE">7 Days</option>
<option value="&DATE-D014->&DATE">14 Days</option>
<option value="&DATE-D021->&DATE">21 Days</option>
</select>

<input type="submit" value="Limit">
```

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Step 4 – keep the New Titles rolling

To keep the New Titles sub-base to a manageable size:

- **Using the GUI, keyword search the earlier month(s) to be removed, e.g. WNW=200311?**

- **save set on the server – it ends up in /alephe/scratch – move it to your BIB01/scratch**
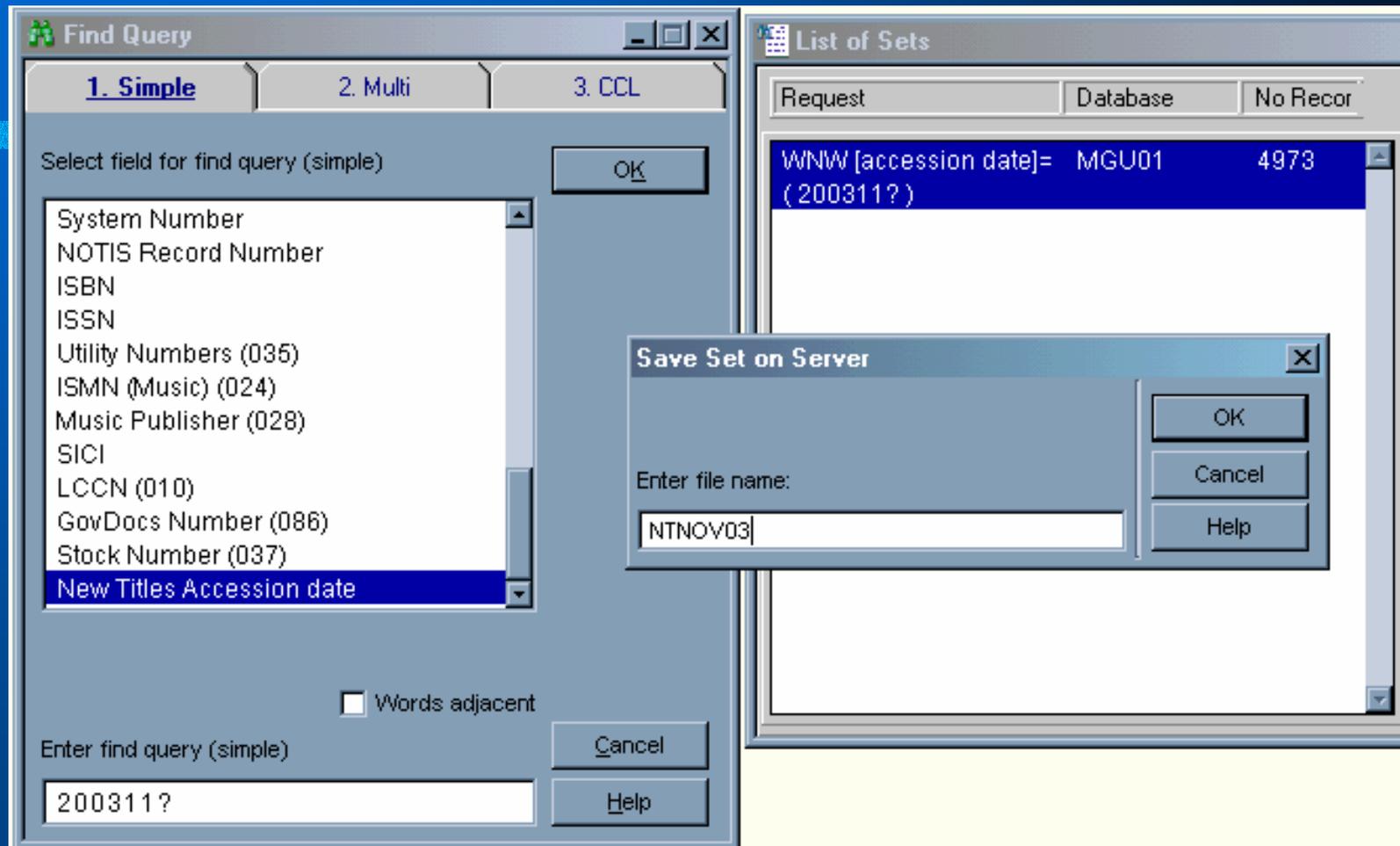
Keep the New Titles rolling (2)

- In tab_base.eng, adjust the base definition to exclude the months:

- NEW   New Titles   MGUSB MGU01   MGU01 (wnw=2003? or wnw=2004?) not (wnw=200306? or wnw=200307? or wnw=200308? or wnw=200309? or wnw=200310? **or wnw=200311?** or wst=deleted or wst=suppressed or wst=reserve or wst=circ)

- Use Util H 1/10 to double check your new definition.
  Before: NEW | 32921| Yes | Yes
  After: NEW | 27992| Yes | Yes

- Push the saved set of record numbers through p_manage_40 (Update Indexing for Selected Records) to make them re-index, and set Z01-UPDATE-Z0102 = 'Y.

- Then p_manage_34 (or UE_08 in version 15 +) will adjust the sub-base counters (i.e. remove index entries for old titles).

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Final Product

- **New Titles Catalogue in MUSE, McGill's OPAC**

- **http://muse.mcgill.ca/F**

- **http://muse.mcgill.ca/F/?func=file&file_name=start-1&local_base=new**

The Accession (Inventory) date field

Inventory Date – **info from Web Guide**

> **"This is the date on which the Inventory Number is assigned. If you leave this field blank and enter an Inventory Number, the system will automatically fill in the Inventory Date when you click the Update button."**

- **If there is an inventory number, but not an inventory date, the first activity on the item record adds that day as the inventory date.**

- **As it was possible for staff to manually change an assigned accession date or to enter their own dates, we added an on-line trigger to prevent tampering with the field.**

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Trigger to protect Accession Date

- **Staff can try to modify or add an accession date, but this trigger returns the field to its original state.**

- **(The trigger is disabled when the daily job is run to add accession dates)**

SQL> CONNECT MGU50

CREATE or replace TRIGGER mgu50.KEEP_ACC_DATE_UPD
BEFORE UPDATE OF Z30_inventory_number_date ON MGU50.Z30
FOR EACH ROW
WHEN (new.z30_inventory_number_date <> old.z30_inventory_number_date)
begin
:new.z30_inventory_number_date := :old.z30_inventory_number_date;
end;
/

Changing field labels

- **Renamed 2 fields in the (14.2) GUI client.**

- **File: ALEPHCOM/TAB/ENG/WINDOW.DAT**

- **ItemForm.Static.InventoryNumber**

  Accession number:

- **ItemForm.Static.InventoryDate**

  Accession date:

```
TextPad - [\\Campus3\data2\Library\User\LSO\Aitkens\Boston NAAUG\tab42.txt]

File  Edit  Search  View  Tools  Macros  Configure  Window  Help

12 !=====================================================================
13 !        tab42 - Automatic change of Item Process Status, according to
14 !                      processing action
15 !=====================================================================

78  ! 1              2   3   4
79  !!!!!!!!!!!-!!!!!-!!!-!!
80  ACQ           ##### NEW OI
81  ! WP used with gifts
82  ACQ           ##### WP   OI
83  ACQ           ##### PS   IP
84  ACQ           ##### WB   OI
85  ACQ           ##### QSV  OI
86  ACQ           ##### DNB  OI
87  ACQ           ##### RSV  OR
88  ACQ           ##### SV   OR
89  ACQ           ##### SV+  IP
90  ACQ           ##### VC   CA
91  ACQ           ##### LC   CA
92
93  SERIAL        ##### OP   NA
94  SERIAL        ##### CL   CL
95  SERIAL        ##### AR
96  SERIAL        ##### UAR  NA
97  SERIAL        ##### NP   NP
98
99  ! PL is the action off the Menu Label printing,
100 ! not used by the Label button in Items.
101 ITEM          BIRK  PL  TR
102 ITEM          EDUC  PL  TR
103 ITEM          GEO   PL  TR
104 ITEM          HLTH  PL  TR
105 ITEM          HRMG  PL  TR
106 ITEM          ICIV  DI  TD

                                      99      1    Read Ovr Block Sync Rec Caps  07:56 PM
```