

# Finding a Better Way

Jason DeShaw

Collection Development/Technical Services Manager

Fargo Public Library

UMWUG – 10/28/2013

# A Disclaimer...

- I am not saying anything revolutionary
- I do think they are good to restate
- I will jump into Aleph eventually

# A Story...

- But it is not about being lazy
- It is about applying your effort where appropriate
- We live in a world of automation

There is a better way!

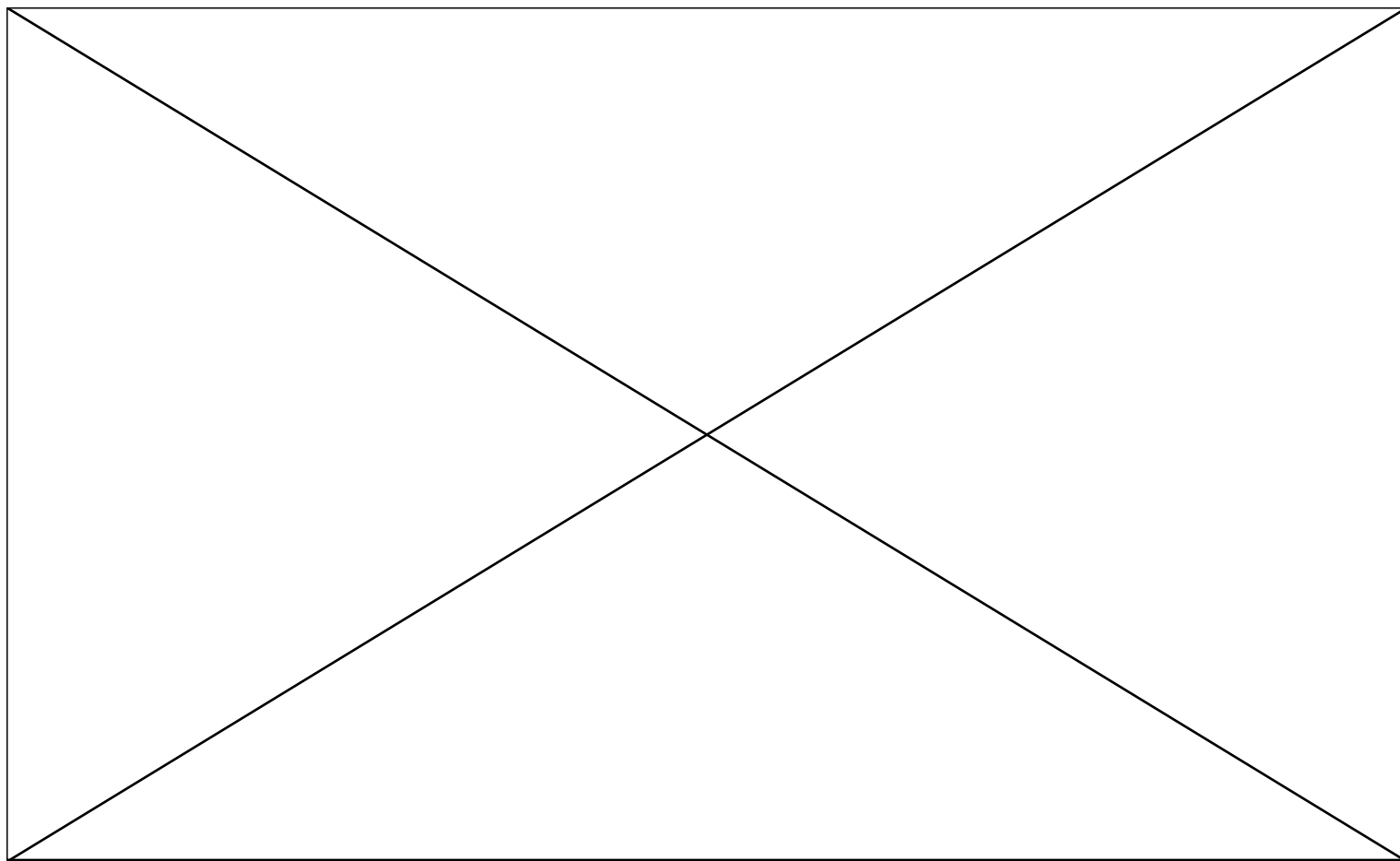
# Fargo Public Library

- Fargo population ~ 110,000
- FM area ~ 216,000
- Material budget
  - 2002: \$308,000
  - 2014: \$591,000
- Tech Services Employee Hours/Week
  - 2002: 200
  - 2014: 184

# Fargo Public Library

- FPL is in a fantastic situation
- I am not in the business cutting jobs (thankfully)
- I am in the business of using our precious time more wisely

A Video...



# Don't lose sight of the problem

- Sometimes the answer is obvious, but we don't see it
- Try to look at situations from an outsiders perspective
- Don't get caught up in procedures



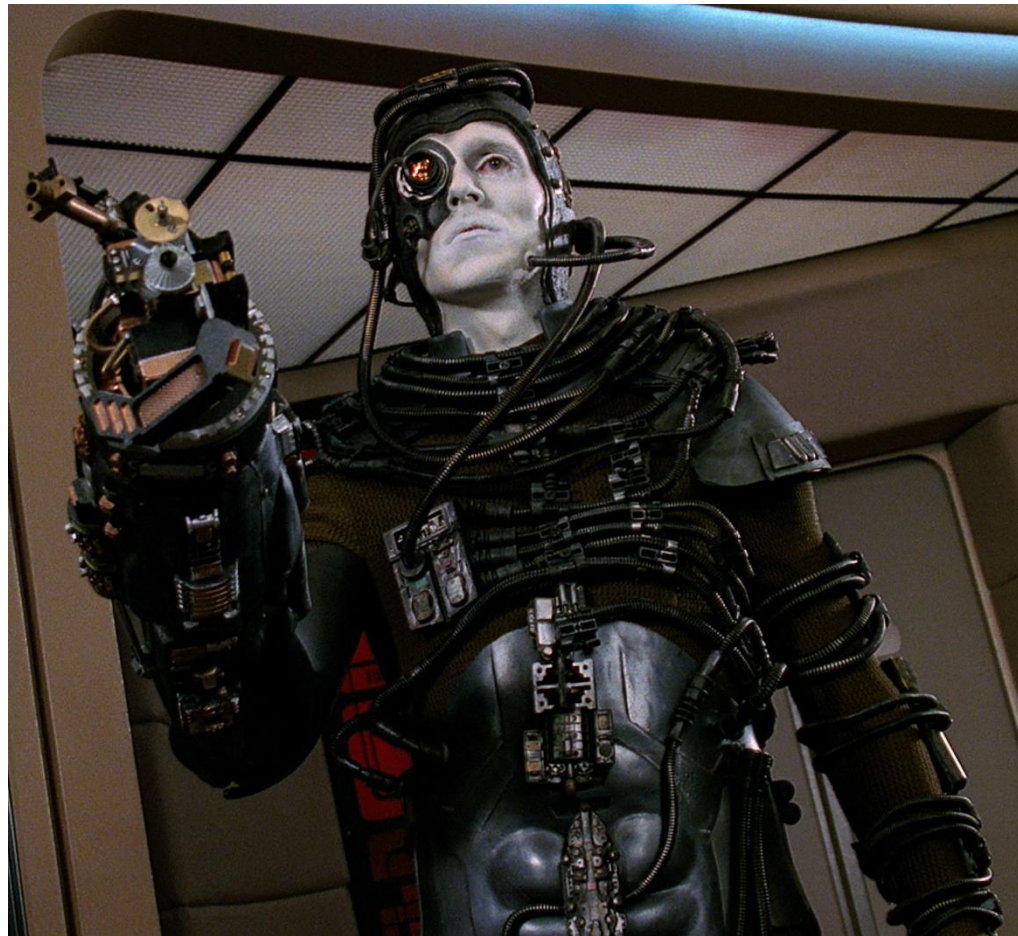
“If it’s not broken, don’t fix it.”

- Boo!
- Status quo mentality
- It is easy to accept the way things are. It is natural. We must continue to look for better ways.

# Low hanging fruit

- Look for repetitive, monotonous tasks
- Not just tasks that you do not want to do, but tasks you do not think anyone should have to do

There will be resistance



# Change Resistor are people!

- Often portrayed as stubborn people who aren't willing to talk
- In reality, we all resist change without knowing it
- Be open. Be educated. Share your ideas and goals.
- “No, but...”

# You will need help

- None of these things were done alone
- I *couldn't* have done these things alone
- Use the people and resources at your disposal

# Let's look at Aleph

- Some of these processes might be obvious
- Some of you might know better ways
- Hopefully you can take something away
- I am explaining these at a broad level, but I will be performing most of them tomorrow at the *Services that Enhance Public Library Workflows* session.

# Aleph Automation

- Update Item Records
- Suppressing Lost Items
- The Weeding Process
- Vendor MARC Loader

# Update Item Records (manage-62)

- A simple (but powerful!) way to make batch changes
- Before: Changes were made either one at a time or sent to ODIN
- Now: We have the ability to make global changes



# Update Item Records (manage-62)

- Used in combination with the General Retrieval Form
- If you can create a set of items that you want to change, you can use manage-62

# Update Item Records (manage-62)

- An example:
  - We want all of our Large Print items to be Material Type: LRGPT but they are currently BOOK
  - Use General Retrieval Form on collection LPFIC and LPNF
  - Use that file output as the input for manage-62
  - Select Material Type and indicate LRGPT
  - Done!

# Update Item Records (manage-62)

- To reiterate: This is very powerful
- Make sure you are capturing only the items you want changed

# Suppressing Lost Items

- We have a lot of items in “Lost” status
  - 100+ items a month are lost
  - Currently 10,000+ items in “Lost” status
- If not suppressed, they display in the OPAC
- Conclusion: We need an efficient way to suppress our Lost items in the OPAC

# Suppressing Lost Items

- A couple problems:
  - “Lost” is a loan status, so we cannot use General Retrieval Form/Update Item Records
  - Even if we could, there are certain Item Process Statuses we do not want to change to SO, such as “Paid”

# Suppressing Lost Items

- Development of Set Item Process Status for Billed Lost Loans (cust-40)
  - Choose Item Process Status: SO
  - Select a date range
  - Filter out Item Process Statuses we do not want changed
- Allows us to suppress lost items quickly and easily

Set Item Process Status for Billed Lost Loans (cust-40) - NFG50

\* Output File: hfg-cust40sept-nonupdate

\* New Item Process Status: SO

\* From Date: 01/01/2000

\* To Date: 09/30/2013

Item Process Status Filter: AR FD IC IL IM IN PD SO

Update Database:  Report Only No Database Update  
 Update Database

Runtime: Today

At: [ ] O'clock:

Library: NFG50

Print ID: [ ]

Report Language: [ ]

Submit  
View History  
Cancel  
Help  
 Add to History  
 Online

# The Weeding Process

- We weed a lot.
  - 2,000+ items a month on average
- Deleting items one-by-one is time consuming
- There has to be a better way!



# The Weeding Process

- Three distinct weeding scenarios:
  - **Bib** ->  **Holding** ->  **Item**
  - Bib -> Holding -> Item  
->  **Holding** ->  **Item**
  - Bib -> Holding -> Item  
->  **Item**

# The Weeding Process

- We need a tool that accounts for all scenarios
- We also need something that allows us to capture the OCLC# so we can manage our holdings in WorldCat

# The Weeding Process

- Delete Item Records (item-11)!
  - Except the “Record Management” option did not work properly at first
  - It also did not capture the OCLC#

# The Weeding Process

- We place all of our items into Item Process Status: WE (Weeding)
- We are able to retrieve these items using the General Item Retrieval Form
- We were able to have an 035tag report added to item-11 to display the OCLC#
- Works fairly well, but not perfect...

# Vendor Marc Loader

- We have a lot of “On Order” items
  - 3,000+ items added per month
- Patrons need to place holds on “On Order” items
  - 3,000+ holds placed on any given day
- Conclusion: We need an efficient way to create “On Order” items

# Vendor Marc Loader

- Diverse selection responsibilities
  - 18 selectors; 3 locations; 3 primary vendors; approximately 80 different vendor carts each month
- Previously, data for each individual title in each vendor cart was manually entered in Acquisitions > Orders > Catalog Orders
  - Obviously time consuming and tedious

# Vendor Marc Loader

- There has to be a better way
- Development of the ODIN custom record loader
- An automated process to load brief bib records with “On Order” items attached, ready for holds to be placed

# Vendor Marc Loader

- The Process
  1. Notification of carts ordered (Selector Form)
  2. Download .mrc records from vendor site
  3. Upload .mrc records to ODIN site
  4. Move .mrc records to proper folder
  5. Load .mrc records by material type



ALEPH Cataloging - Version 20.01 Library: ODN01 - ODIN Bibliographic (ODN01) Server: odinlibrary.org:6353 (20.01) User: JASON

ALEPH View Cataloging Items Edit Actions Edit Text Record Manager Remote \*Services Help ?

Barcode BIB= 7433609 ADM= 7433609 - The Circle (Eggers, Dave) Year: 2013.

Items List

B-C	Sublibrary	Description	Call number	Collection	Status	Notes	Loans
7433609-10	Fargo Public - Main Library				On Order	On Order	0

Sort Options: ▼

New

Duplicate

Delete

Label

Global Change

Find/Change

Completed Vol

Refresh

Add to Set

RFID

1. Item Display | 2. General Information (1) | 3. General Information (2) | 4. Serial Information | 5. Serial Levels | 6. HOL Links

Barcode:  Item Status:  Update

Sublibrary:  Item Process Stat:  Save Default

Collection:  Enum. Level.1 (A):

Copy Number:  Enum. Level.2 (B):  Refresh

Material Type:  Abscr Default

Hol. Link:  Cancel

85X Type/Linking Nur:    Temporary Locati

Call No. Type/Call No:

2nd Call No. Type/Ca:

Description:

# Vendor Marc Loader

- **Benefits**
  - Staff time saved
  - Automatically checks for duplicate items
  - “On Order” items in OPAC for patrons to place holds very shortly after item is ordered

# Time Saved

- 15 seconds to change a record x 1,000 =
  - 250 minutes or 4.16 hours
- 30 seconds to weed a record x 2,200 weeded items =
  - 1,100 minutes or 18.33 hours
- 60 seconds to create a brief bib x 3,000 records a month =
  - 3,000 minutes or 50 hours

# In Conclusion...

- There is a better way
- Collaborate
- Don't take “no” for an answer



# Thank you!

Questions? Comments? Concerns?

Jason DeShaw

Collection Development/Technical Services Manager

Fargo Public Library

[jdeshaw@cityoffargo.com](mailto:jdeshaw@cityoffargo.com)