University of Massachusetts Amherst

ScholarWorks@UMass Amherst

University Libraries Content and Discovery Materials

University Libraries

2021

Content & Delivery 2021 Showcase

Information Resource Management

Circulation Services:
Weathering the storm
July, 2020 – June, 2021
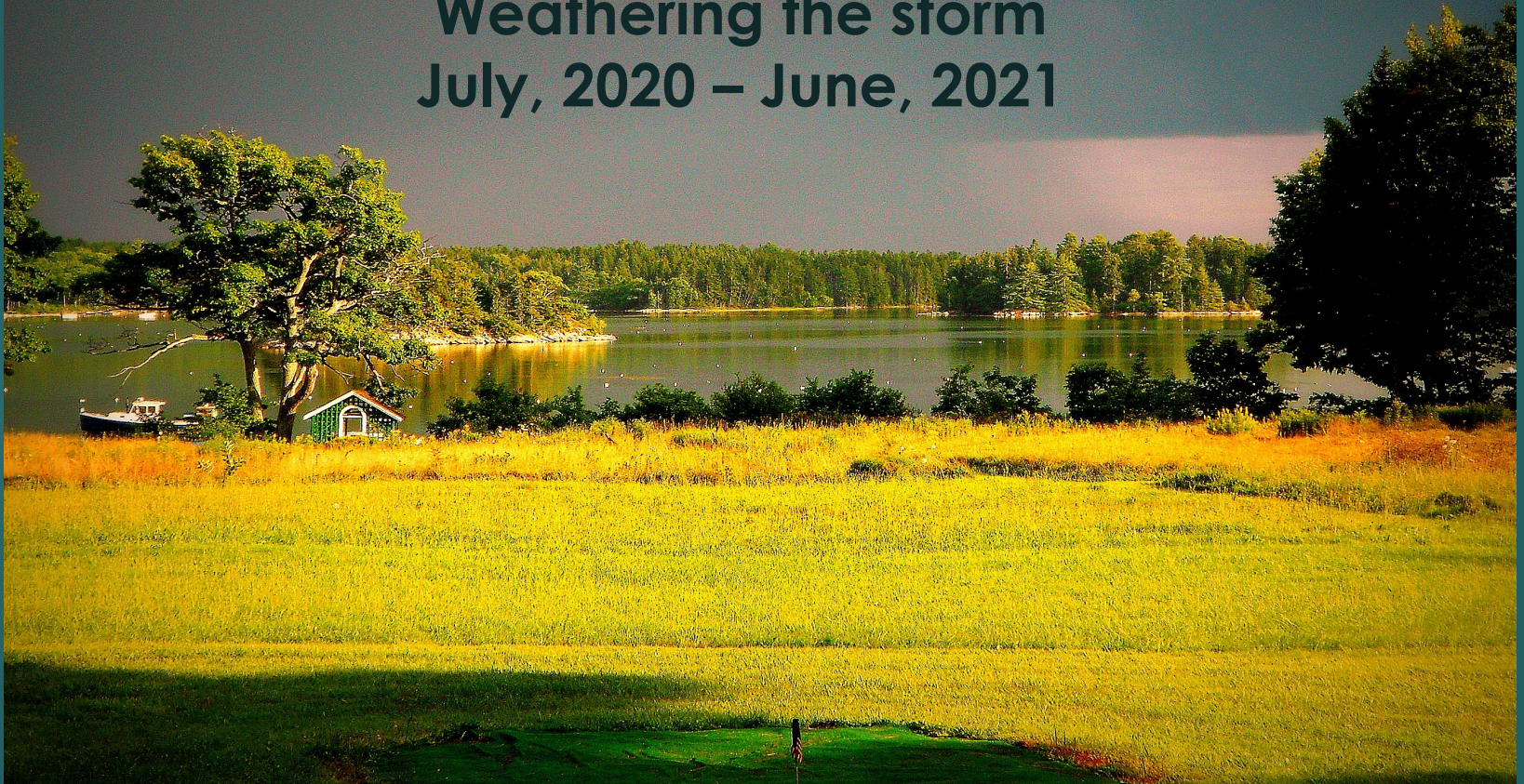
On-Site Work

Circulation & Stacks Mgmt. staff

on-site full-time since Aug. 17, 2020:

Ben Chase

Michael Magrath

Alan Wu

Laurence Mini (Mt. Ida)

The ducklings were thirsty…

By the numbers: Contactless pickup processing

Year	Contactless Pickup item processing & notification
2020 (Aug-Dec)	2908
2021 (YTD Jun. 21)	5501

Building Operations managed contactless pickup appointments and pickups of bagged items

Contactless Pickup: requested items pre-checked, bagged and tagged

Year	Items
2020 (Aug-Dec)	~2900
2021 (YTD Jun. 21)	~5500

And then there were:

▶ **Returns processed** (Mid-March 2020 – Mid-March 2021: **No student staff**) **17,908**

▶ **Stacks Retrievals: UM/5C: 5,353** (8/18/20 – 4/30/21) **ILL: 1,468** (Jul. 2020 – June, 2021)

▶ **Circ LibAnswers patron inquiries answered Sep, 2020 – June, 2021: 660**
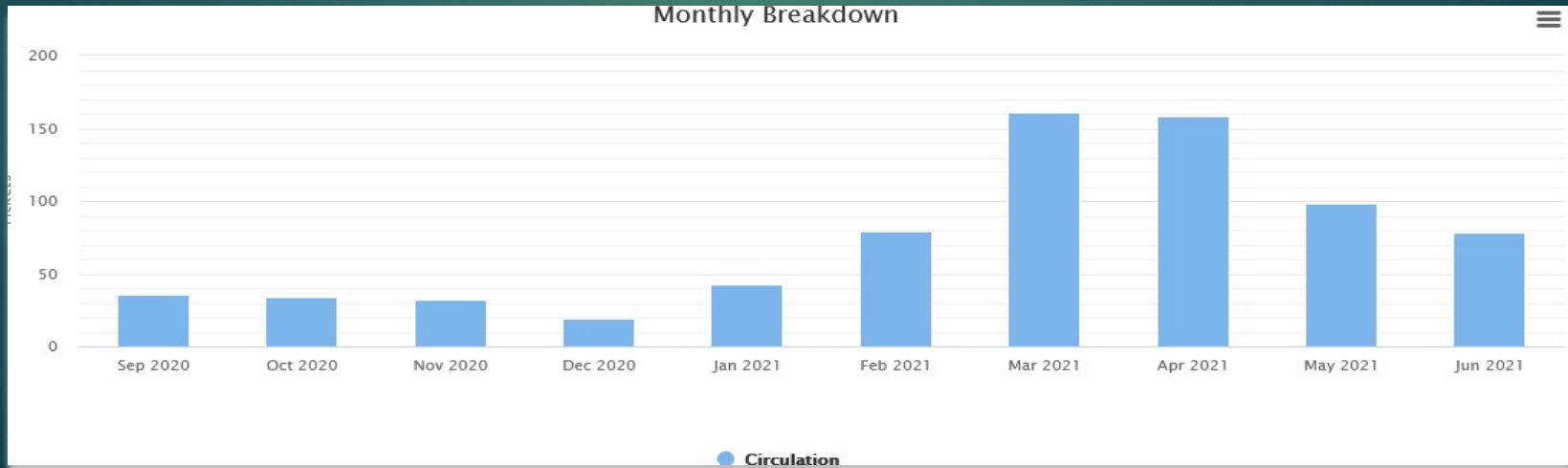
Material Quarantine & Staging

In effect Aug. 24, 2020 – Jun. 22, 2021
3 Days – Returns and Incoming FCD materials
1 Day – Internally handled materials

Orange
<u>QUARANTINE</u> TAG

SOURCE	
Start Quarantine	Date Time
End Quarantine	Date

Billing Transition/Handoff:
Mary Yokubaitis to
Emily Dine & Val Locke

Mary continues as primary public-facing contact for UMass/5C Library patron billing inquiries - transitioned from Billing Supervisor to *Circulation User Support Specialist.*

Library Business office (Emily and Val) now oversee transactional student/bursar billing processing and transmittal. Amelia Sutton and DRMS supporting FOLIO billing preparations.

Successful year-long training and transition efforts resulting in closer collaboration going forward between Access Services and Library Business Office

Meanwhile, at the Mt. Ida campus:

The Wadsworth Mt. Ida branch re-opened to walk-in student, staff, faculty patrons at the beginning of the Fall 2020 semester with contactless pickup, patron check-in/contact tracing logs, printing and computer access, closed stacks, and single occupancy bookable study spaces.

Laurence Mini was the only staff member at that branch for the entire academic year, serving patrons, hiring and supervising four student staffers, supporting collection project work and working with Library and campus facilities administrators at the main campus and at Mt Ida.

We got an **exterior book drop** last fall - yay!

Projects and stuff

- Clear 6 volunteer flag and tag project (Jun-Jul, 2020) 46,000 items tagged

- R2R (Reshelve to Reopen) project: (Jul. 13 – Aug. 7, 2020) 8,000 items reshelved by staff volunteers

- Stacks Inventory Scanning project (M. Magrath): nearing completion

- Courtesy, loan & overdue notice content revisions, contactless pickup notices, batch loan extensions during campus restrictions, collaborations with 5C committees, FOLIO working groups and SIGs

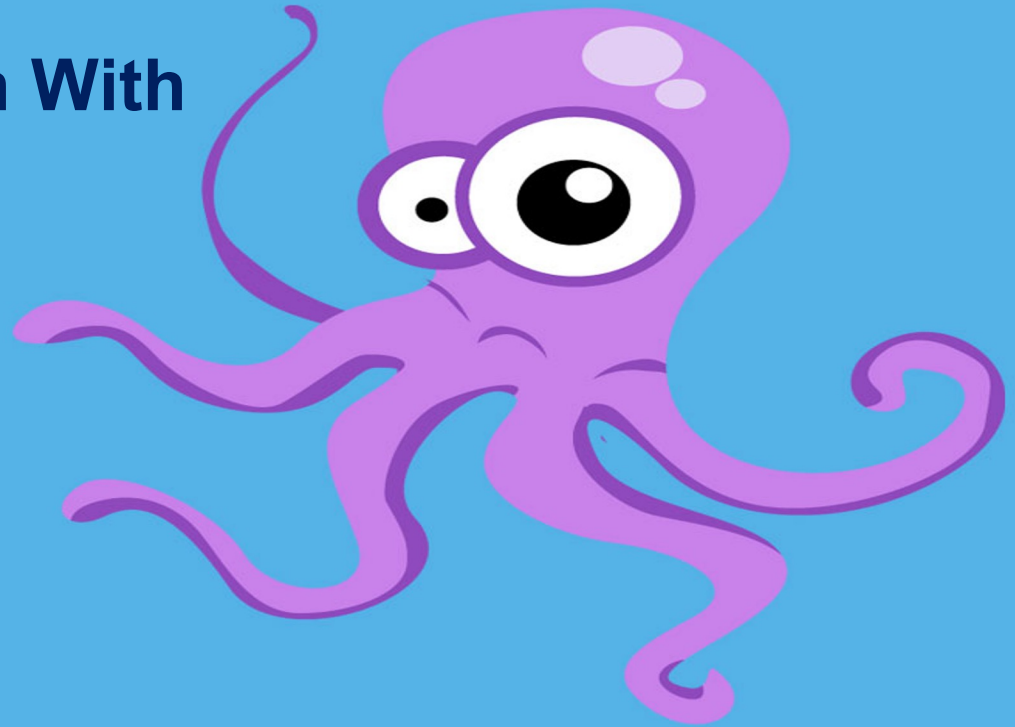- LC/Access Support Team orientation, training and communications

LC Staff Access Support Team
(Sep. 2020 – Mar. 2021)

▶ **Megan Wilson (ongoing)**

▶ **John Slavkovsky**

▶ **Theresa Dooley**

▶ **Paul Sherry (now**
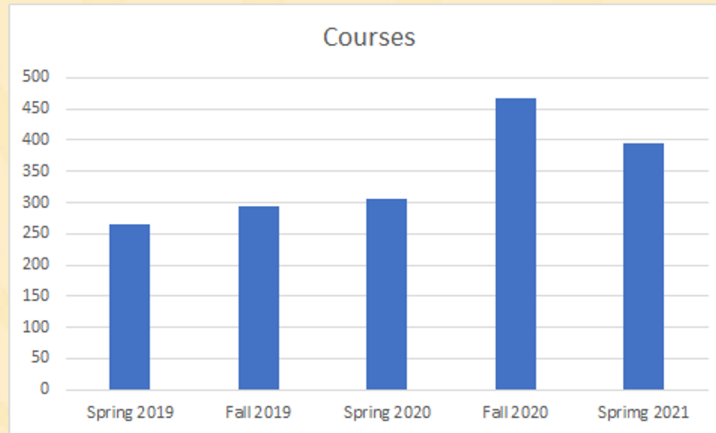
▶ **Carol Will**

Questions?

What's Going On With Reserves?

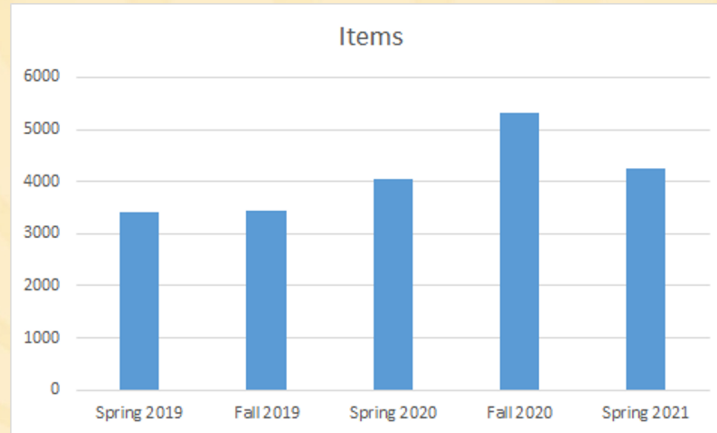# What Did We Do?

What Did We Do (cont.)?

What Else Do We Have?

Books (of course)

CDs

LPs

DVDs

VHS

16mm films

Microforms

CDs

—

Over 10000 CDs, open and browse-able (9th floor now)

Student/Faculty performances

Classical/Jazz/Blues

Few audiobooks

LPs

_

Over 11000 LPs, in closed storage
Classical and Jazz

DVDs

—

10000+ DVDs

Mix of educational/academic and entertainment

VHS

—

Over 4500 VHS tapes

Few options on campus for non-US formats

Digitization possible

16mm Films

—

Over 700 16mm films

Limited availability of projectors

Digitization possible

Microforms

─

Over 200000 microforms

Early English books

Journals

Not just text

fppt.com

Staffing

- Ben Paul
- Deborah Place

Future plans

- Physical Reserves!
- FOLIO!

Migration Timeline
and
Staff Impact

Interlibrary Loan & Document Delivery

C&D Showcase
30 June 2021

Meet the team

Michael
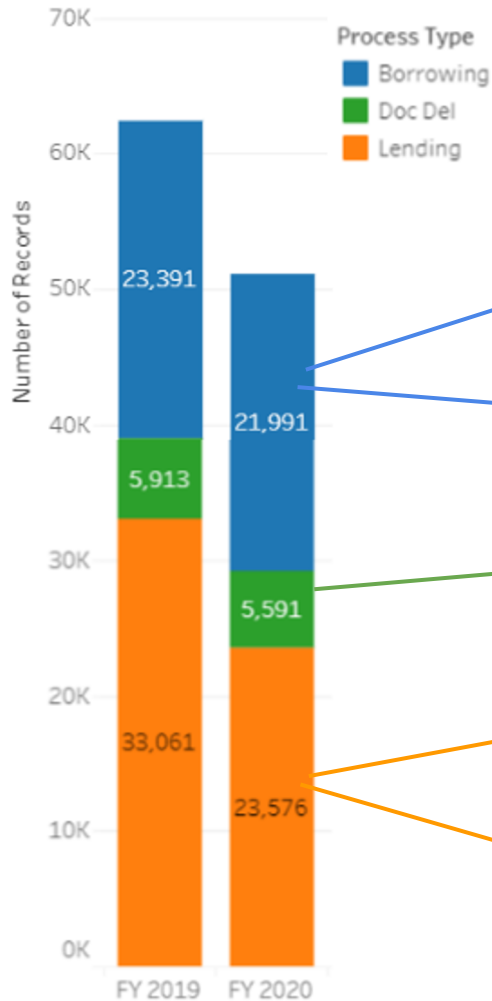
John

Tea

Rachel

Steve

Kate

Borrowing Article success rate 98% FY20
(95% past year avg pre-March 2020)

Borrowing Loan success rate 84% FY20
(77% past year avg pre-March 2020)

Doc Del success rate over 99% FY20
(99% ast year avg pre-March 2020)

Lending Loan success rate 56% FY20
(60% past year avg pre-March 2020)

Lending Article success rate 59% FY20
(62% past year avg pre-March 2020)

New Web Pages

- WCAG Compliant
- Surfaces more information
- Matches UMass/Library branding
- Patrons can set delivery preference

Library Express

- Patrons can now set delivery preferences in their own account

- Expanded services:
    - Anywhere off campus/in US
    - Sending 5C and ILL books

Library Express by Calendar Year
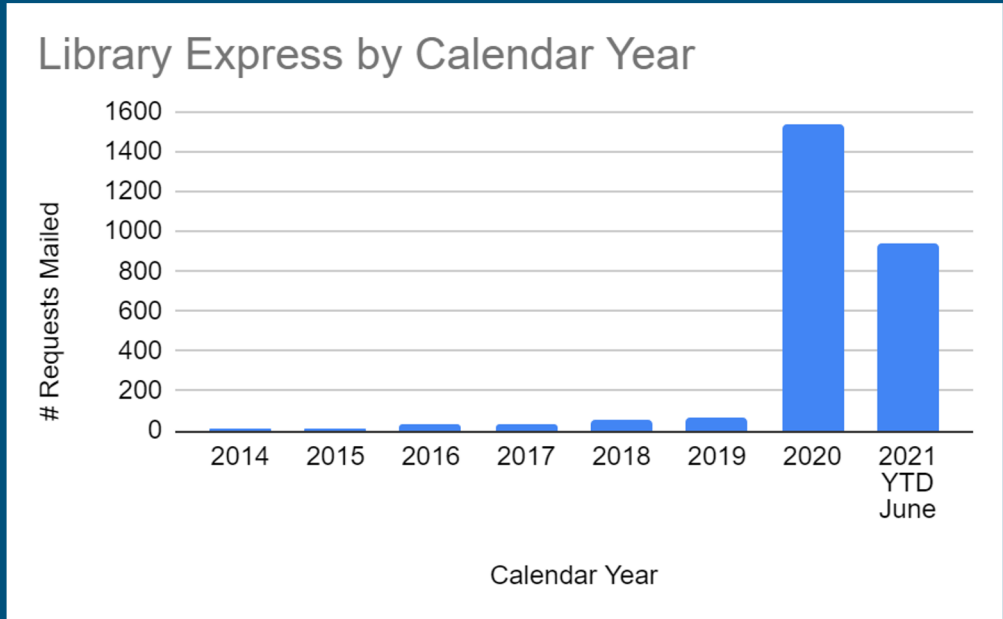
Return Shipping Labels

In the last year, sent 168 shipping labels for library materials (separate from Library Express)
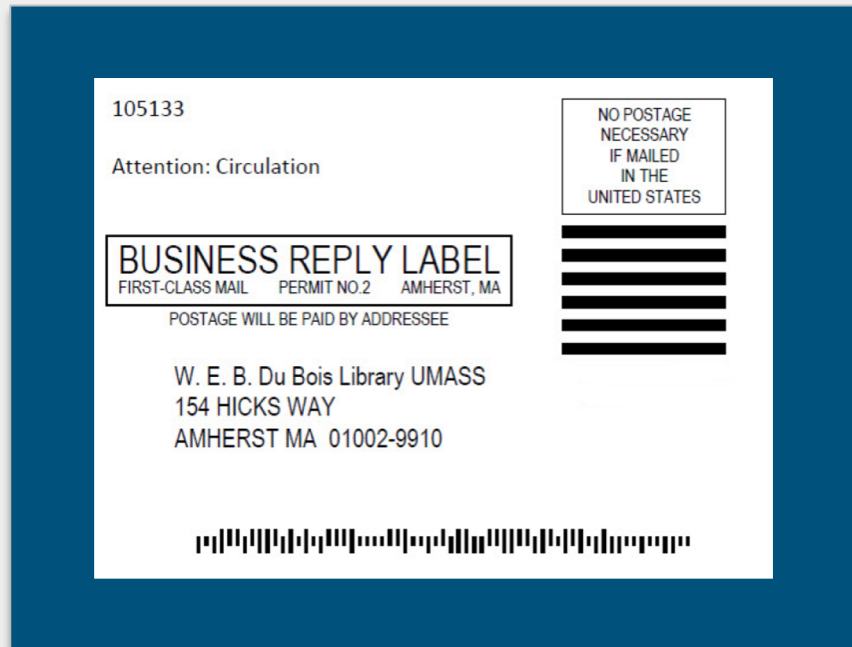
Nearing 1 year on LibAnswers

- Live since August 2020

- Average 440 tickets/month

- Over 90% answered in 24 hours or less

- Almost 60% answered in under 10 minutes

Updated Copyright Evaluation Process

- Considers publication frequency against # of articles borrowed

- First invoice requests to CCC for the new process have been submitted!

- Continuing to streamline workflow

2020 Unique ISXN	Title	Issues Published per Year	Current UM Subscription?	A: all articles published any time, compared to half of issues published in years borrowed from	Number to pay for by Measure A: (returns 0 if subscription=yes)	Measure B.: Objectively high? (total# borrowed in eval year published in last 2 years)	Number to pay for by CONTU measure: (returns 0 if subscription=yes)	# publication years borrowed in eval year	List of publication years borrowed in eval year
1540-9996	Journal of Women's Health	12	No	2	2	42	38	8	2020, 2019, 2018, 2017, 2014, 2013, 2010, 2007
1752-6299	International Journal of Community Music	3	No	31	31	14	20	12	2019, 2018, 2017, 2016, 2015, 2014, 2013, 2012, 2011, 2010, 2009, 2008
0028-6060	New Left Review	6	No	-32	0	14	14	26	2020, 2019, 2018, 2017, 2016, 2015, 2014, 2013, 2012, 2011, 2010, 2008, 2007, 2006, 2003, 2002, 1998, 1991, 1985, 1976, 1974, 1965, 1964, 1962, 1961, 1960

As we move towards Fall:

- Scanning articles for our patrons from both SEL & Du Bois

- Borrowing all types of materials from other libraries

- Still connecting patrons to library e-books when possible

- Continuing expanded Library Express

- Piloting FullTextFinder ILLiad addon

Questions

Migration underway!

How does this impact regular operations?

FOLIO ERM Apps are tracking and managing electronic content

CORAL still used for licenses for now

folio

Review: Revised timeline and staff impact

Iris version pushed back

Test features and integrations.

Critical Functionality

Development continues on important features.
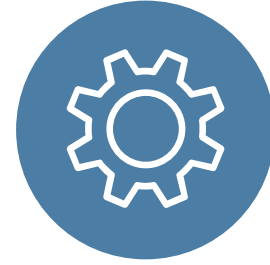
Pandemic

Continue to adapt in ever changing world.

Migration Milestones

Iris release

Loads :
- Invoices, orders
- patron blocks
- current loans and requests
- fees and fines

Kiwi release

This is the release we will train and create documentation on. It will have a number of features that will help us finalize workflows and make other workflows easier.

July 2021   Fall 2021   December 2021   February 2022

Review and Refine

- All data loads
- Integrations with OCLC, campus systems
- testing workflows
- crafting documentation

Approval of final maps for Acquisitions apps

Orders, invoices, finances, integrations with campus systems will get a final check

folio

Staff Impact

Working groups may tap data or process experts to verify loads.

A broader range of staff may be asked to assist in testing and data validation.

Documentation continues.

| Summer 2021 | Fall 2021 | Winter 21/22 | Spring 2022 |

Working groups reviewing loads and functionality. They will also be testing workflows with assistance from data or process experts.

Documentation creation starts.

Training.
Documentation continues.

folio

METADATA UNIT

—

C & D Showcase - June 30, 2021

Current unit members:
- Meghan Bergin (Unit Coordinator)
- Ann Kardos
- Heather Deirdre
- Jennifer Eustis
- Sharon Domier
- Susan Pease

Honorary members:
- Steve Robinson (SCUA)
- Linda Fish (Acquisitions Unit)
- Laurence Mini (Mt. Ida Campus Library)

Former Unit Members:
- Lucy deGozzaldi (retired)
- Diana Pacunas (transferred to Acquisitions Unit)
- Linda Merritt (honorary member)

FOLIO METADATA MIGRATION

A sub-project of the FOLIO migration process, "Aleph Clean-Up" corrected thousands of records before moving them into the new catalog.

Examples of issues corrected

- Brief "on the fly" records linked to correct or replaced with full records
- OPAC notes cleaned up or moved into item description field
- Incorrect locations reviewed (ex: a book shows it's in the old textbook annex but it's actually still up in the stacks in Du Bois)
- Incorrect material types (ex: a print book displaying as an e-book)
- Broken URLs
- Incorrect or confusing serials holdings statements
- Invalid/obsolete MARC tags in bib and holdings records
- Data put in incorrect fields moved to correct fields
- Updating practices to current standards for record migration

Number of records corrected = 984,411 & counting!

SIMPLIFYING E-RESOURCES WORKFLOWS

E-Resources Workflows

Simplifying and Aligning Workflows…

- The Batch Services Working Group has developed a set of recommendations based on its work and that of various FOLIO 5C working groups:
  - One location for eResources
  - Re-envisions batch loading: From inventory to discovery
    - Better accessibility
    - Separates our purchased e-Inventory from temporary batch loaded data
  - Streamlines workflows
  - Aligns best practices with 5C practices

Discovery & Resource Management Systems (DRMS)

Full Text Finder

The Migration is Underway!

Status of Platforms

Migrated:

* Google Scholar
* EBSCO
* ProQuest
* Wiley
* Web of Science
* PubMed
* Royal Soc. of Chem
* Gale
* JSTOR
* Project Muse
* Sage
* ACS

Migrated:

* MathSciNet
* Oxford
* Annual Reviews
* Ovid
* HighWire
* IEEE
* APA
* Ingenta
* HAPI
* Brepols
* Brill
* Hein

Status of Platforms

Pending:

* Elsevier Platform
* ComAbstracts
* INFORMS
* Springer/Nature

PubFinder replaced the eJournal A-Z at the start of June with no complaints.

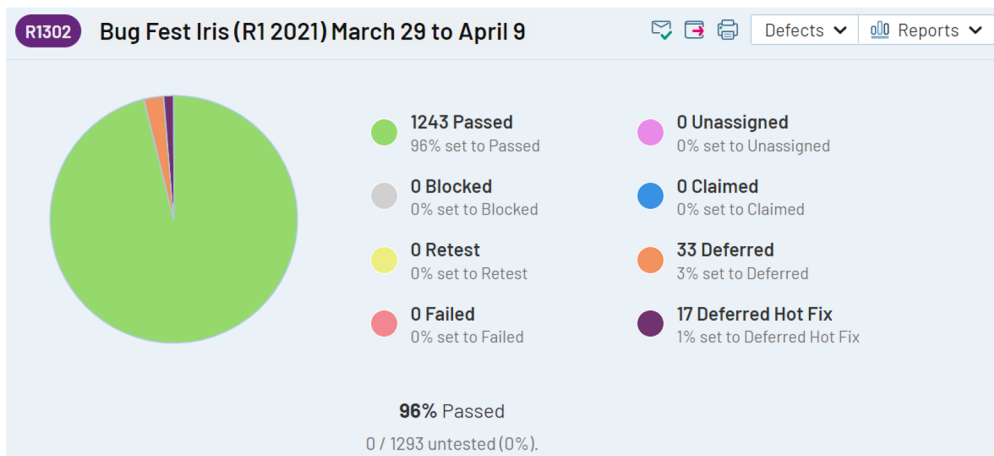We have received broken links as we normally do but no major patron issues.

In July, I will review SFX stats to make sure no one is using SFX somewhere out in the wild.

FOLIO Bugfest

What is Bugfest?

R1302 **Bug Fest Iris (R1 2021) March 29 to April 9** Defects ⌄ Reports ⌄

- **1243 Passed** 96% set to Passed
- **0 Blocked** 0% set to Blocked
- **0 Retest** 0% set to Retest
- **0 Failed** 0% set to Failed
- **0 Unassigned** 0% set to Unassigned
- **0 Claimed** 0% set to Claimed
- **33 Deferred** 3% set to Deferred
- **17 Deferred Hot Fix** 1% set to Deferred Hot Fix

96% Passed
0 / 1293 untested (0%).

Who Participates in Bugfest?

Ann Kardos
Amelia Sutton
Jennifer Eustis
Jaime Taylor
Jack Mulvaney

FOLIO Bugfest

A simple example:

https://foliotest.testrail.io/index.php?/tests/view/665270

Steps

1. Navigate to Settings -> Data export -> Field mapping profiles
2. Click the row with a mapping profile that is not the Default instance mapping profile
3. Once the view form opens, click the "Actions" menu with "Edit", "Duplicate", "Delete" options available
4. Click the "Delete" option

FOLIO Bugfest

Something a little more complex:

Preconditions

User has Check Out: Check out circulating items permissions
Item exists with at least two check out notes, added at different times. Item is not a multipiece item.
Borrower for which the borrower and item triggers a loan policy that allows the item to circulate.

Steps

1	Enter barcode for a user in the Check Out app. Enter barcode for item with at least two check out notes.	Check out note modal appears. Notes are sorted with most recently added at the top. For each note,
2	Click cancel on the Check out note modal.	Item is not checked out.
3	Enter barcode for the item again.	Check Out modal appears. Notes are sorted with
4	Click Confirm on the check out note modal.	Item is checked out to the patron.
5	Click action (ellipsis) menu for checked out item.	Check out notes appears as an option in the menu.
6	Click Check out notes in action menu.	Check Out modal appears. Notes are sorted with
7	Click close.	Modal closes.

Acquisitions Unit
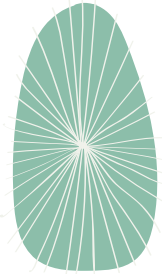
C&D Showcase - 30 June 2021

Current ~~Band~~ Unit Members

Rebecca Addison

Acquisitions Specialist Books, e-Books, DVDs, CDs, Scores...

Linda Fish

Metadata Specialist Records edits, physical materials processing

Diana Pacunas

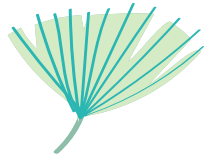Acquisitions Specialist e-Journals, physical journals/serials

Nancy Washburn

Acquisitions Specialist Databases, content fees

Scott Stangroom - Unit Coordinator

Past ~~Parrots~~ Unit Members

Judy Rohan

Retired September, 2020

Linda Merritt

Retired December 2020

What we did ~~on our summer~~...during a pandemic

Ordered/Licensed

- Books
- One off E-Books
- DVDs
- Streaming Video
- Databases

Renewed/Processed

- Journals/eJournals
- E-Book Packages
- Databases
- Content/Access Fees
- Books, DVDs

Cancelled

- Journals
- E-Journals
- Databases

By the Numbers, etc.

FY20 Start to Finish

Start = $9,304,230

End = $8,804,230

Returned = $500,000

Cancellations!

Print Journals = 508 ($78,000-ish)
Print Serial = 337 ($66,988-ish)
eJournals = 52 ($66,967-ish)
Databases = 22 ($215,320-ish)
Newspapers = 6 ($5,244-ish)
Total = $432,519

Book & DVDs

Books = 1,499
eBooks = 1,026
DVDs = 231
Total Spend = $328,386

One-Time & New Spending

SCUA Purchases

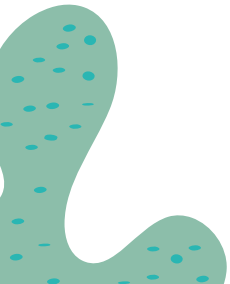AVON*, Lexis Uni, Bloomsbury Food Library, E&E News, Sex & Sexuality 1 & 2

FY21 Start to Finish

Start = $8,402.561 (and kept)

End Balance = $83,154.09 total

$58,276.63 encumbered balance

$24,877.46 free balance

Databases Canceled

- InCites
- Anthropology Plus
- CAB Abstracts
- EconLit
- Health and Psychosocial Instruments
- Humanities international complete
- Index Islamicus
- Art History Research Net
- Index to Current Urban Documents
- Corporate Affiliations
- Bibliographie de civilisation médiévale
- Country Report (EIU)

- Oxford Bibliographies: African Studies
- Oxford Bibliographies: American Literature
- Oxford Bibliographies: Atlantic History
- Policy Map
- RefWorks (ends 31 July, 2021)
- Simmons OneView
- BrowZine (ends 30 June 221)
- American Firms Operating in Foreign Countries/Foreign Firms Operating in the US
- Global Road Warrior

THANKS!

questions?
stangroom@umass.edu
413-545-6724
Acquisitions Unit

Content and Discovery thanks you for attending!

We will now take questions.