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TESTIMONY

From One at a Time to All at Once: Streamlining the Withdrawal Process

For weeding projects at Buswell Memorial Library at Wheaton College in Illinois, the Resource Description (RD) department previously withdrew items one by one, deleting each by hand and dealing with problems as they arose, a process that took up a significant amount of time. Using batch capabilities in OCLC Connexion Client and an upgrade in the Voyager ILS, staff learned how to streamline the withdrawal process and free time for other tasks.

The previous withdrawal process began with subject librarians leaving carts of weeded items in the RD area or turning books on their spines in the stacks. Most weeding projects were scheduled during the summer, but carts would filter in during other times if librarians needed to weed in preparation for a departmental review. This could create cart shortages and required RD staff to handle withdrawals on others' schedules. Communication was haphazard, and RD staff didn't always know if a cart of books was there for withdrawal or some other purpose. The department hired a student assistant to handle the summer projects, but books could sit for weeks while waiting for withdrawal, which caused cart overflow in staff areas and created problems if someone was looking for a specific item on one of the carts, since no shelf locations were changed for any of the items.

After gathering books to be withdrawn, the next step was to withdraw the items from the ILS. Each item in Voyager has three components — the bibliographic record, the holdings record, and the item record — and each of these needed manual examination according to this process:

1. Scan the barcode of an item to retrieve an item record.
2. Retrieve the corresponding holdings and item records.
3. Delete the item record.
4. Delete the holdings record.
5. Copy the OCLC accession number from the bibliographic record, paste it into OCLC Connexion Client, and remove holdings from OCLC.
6. Delete the bibliographic record.
7. Repeat until done.

This was the process for simple withdrawals, but frequent exceptions lengthened the process. If a holdings record is connected to a purchase order, it cannot be deleted, requiring manual changes to the record and suppression from public view, which in turn prevents the bibliographic record from being deleted. If the library has multiple copies in multiple locations, but not all copies are weeded, that requires yet another process. Various other exceptions involve different procedures.

In June 2015, our consortium upgraded from Voyager 7.2.5 to 9.1.1, providing numerous enhancements to Pick and Scan, a batch editing function. With this upgrade, we could now upload a text file of barcodes into Pick and Scan to run batch deletion, and we used this opportunity to rework other parts of our withdrawal workflow as well.

To minimize the backlog of carts that would appear every summer and throughout the year, we notified the subject librarians that we would no longer accept carts or turned-over books. Instead, they were to compile a spreadsheet or text file of barcode numbers for weeded items and e-mail it to our central RD e-mail address to open a request in our ticketing system, which alleviates the haphazard communication problems. The RD ticket manager assigns the ticket to the appropriate staff member, who runs the barcode list through Pick and Scan to assign it an item statistical category (essentially a tag) of **Pull to Withdraw**.

When RD has the time to handle the withdrawals, a staff member runs a query in Microsoft Access to retrieve all items marked **Pull to Withdraw**, then prints it into a list for a student assistant to pull the amount of items that can be withdrawn during a shift. This eliminates the backlog of carts in the RD area and ensures that items do not appear as available in the OPAC while waiting to be withdrawn.

With the upgrade, the ILS withdrawal now requires the following steps:

1. Scan the barcode from each item on one cart into a text file, naming the file according to the number assigned to the cart.
2. Run the file through Pick and Scan to batch delete the items. Particular settings allow the program to provide a list of OCLC accession numbers from completed withdrawals along with a log file of problems that occur during the batch.
3. Run the list of OCLC accession numbers through OCLC Connexion Client's batch holdings deletion process.
4. Review the log file and deal with the problems.

The log file makes it easier to deal with the withdrawal problems mentioned earlier. It informs us if a holdings statement cannot be deleted because it is attached to a purchase order, and it lets us know if fines are still connected to an item or if we still have other copies available in other locations. This allows us to focus on the exceptions while not spending extra time on the straightforward withdrawals.

We also added a new step that assists with preservation of materials not widely held by other libraries. Our consortium has a program called the Last Copy Project, which allows members to preserve the last copy of an item not held elsewhere within the state of Illinois by shipping it to the University of Illinois at Urbana-Champaign (UIUC). Our participation in this program was previously inconsistent due to the amount of work required to identify which of our weeded materials were the last copies available in the state. Some subject librarians would set aside items that appeared to be rare, and an RD staff member would search for those items by title in both WorldCat and the consortium's union catalog. Other librarians simply did nothing. We wanted to ensure our withdrawn materials were preserved even if they were no longer relevant to the college's curriculum, so our Digital Initiatives department created a Last Copy program using OCLC's WorldCat Search API.

To identify last copies, we now run the previously created list of OCLC accession numbers through the Last Copy program, and it identifies items that are no longer held by any OCLC member library in Illinois. The process frequently identifies items we would not have thought unique, but it also minimizes sorting through several items held elsewhere in the state.

Having followed this procedure for nearly a year, we find it a major improvement on the old method. We previously hired a student assistant to do nothing but withdrawals for two months during the summer, and now that time is free for projects such as systematic record enhancements. The new process also minimizes errors, since the old click-heavy procedure often produced mistakes such as failure to remove holdings from OCLC. Even if your library uses an ILS other than Voyager, I highly recommend investigation into streamlining possibilities, both in the ILS functionality and in the physical workflow.

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