collectionHQ

Grubby Items Refresh and Transfer Instructions

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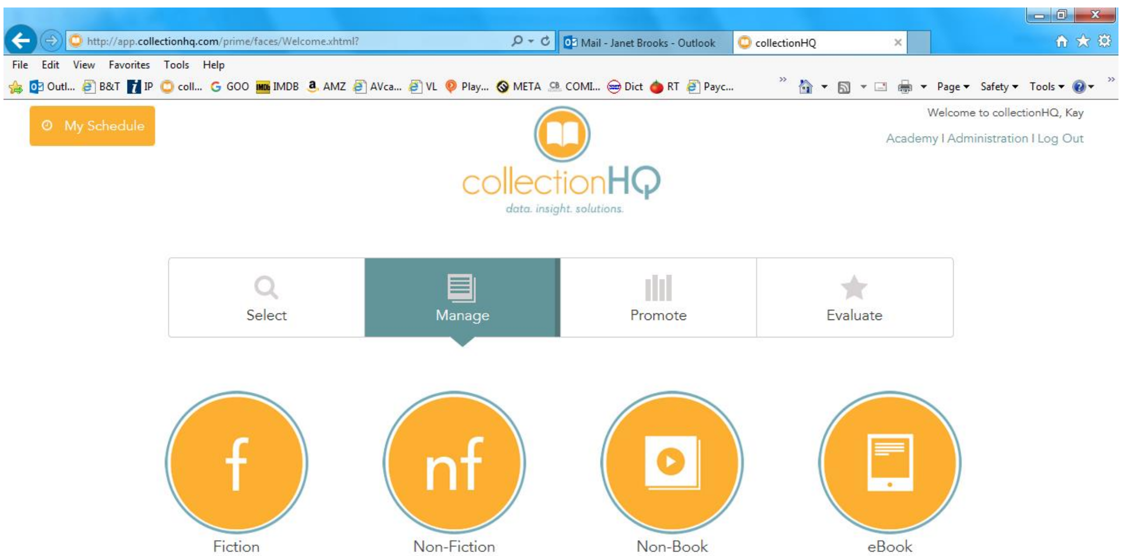
Log In

- To access the software just visit the website collectionhq.com. You can access the website from any computer, laptop or iPad.
- Log in with your email and for first time users the generic password is Metro123. You can change the password by going to the Administration tab, then to "***My Account***". Be sure to save the new password.
- If you cannot access the program, contact Janet Brooks or Melissa Weathers in MSL. They may need to set you up as a user.

Landing Page

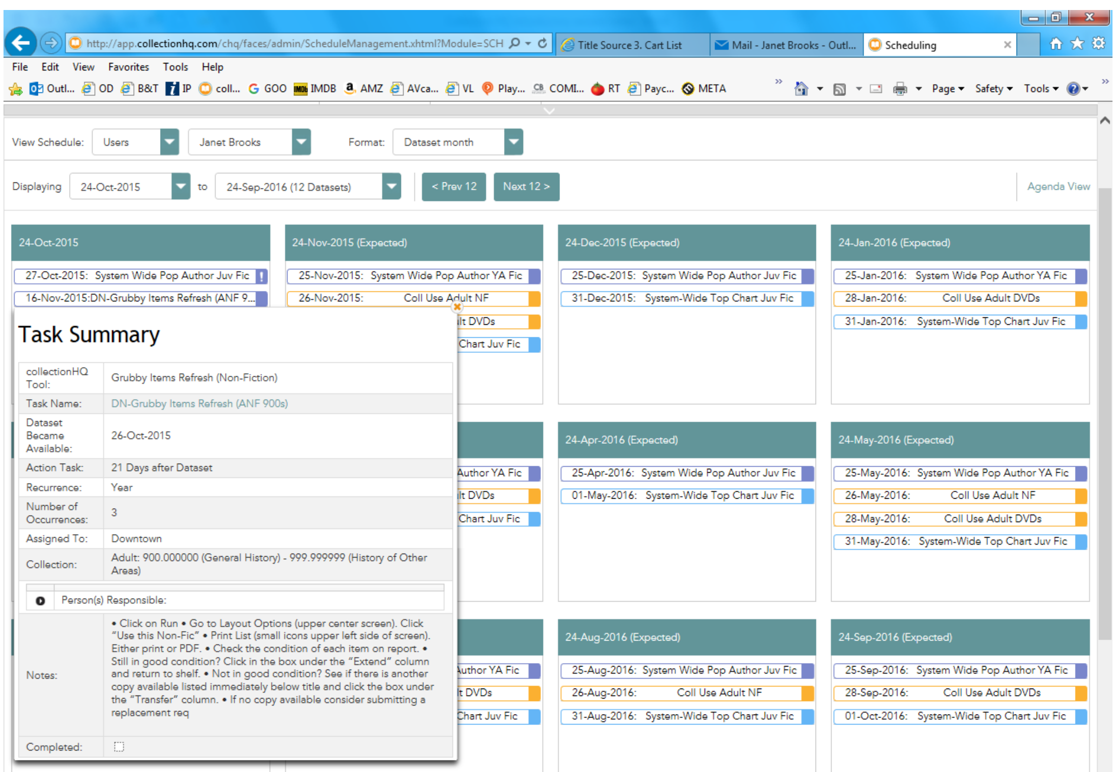
- On the landing page you'll see 4 large circles that designate collection divisions: F (Fiction), NF (non-fiction), Non-book, and ebook.
- Above the circles is the "***Manage***" tab. This tab is where you generate reports that will help you manage your collection.



Scheduled Assignments

MSL will set up scheduled assignments for each part of the collection for every dataset.

- In the upper left-hand corner of the first screen you will see a box called "***My Schedule***". This is where you can see your assignments by date.
- When you are assigned to work a particular report, you and your supervisor will be sent an email when it is time to work that assignment. (See the attached schedule that outlines when specific sections will be assigned and for due dates.)
- Click on the first assignment.
- The pop-up screen "***Task Summary***" gives you general information about the assignment.
- Click on the greyed out "***Task Name***" and you'll automatically go to the report.
- At the bottom of the screen next to "***Completed***" is a box for you to check when you have completed the assignment. Please note that if two or more people share an assignment, the first person to mark complete causes the entire assignment to be marked complete. Please check with others assigned to the task before marking complete.

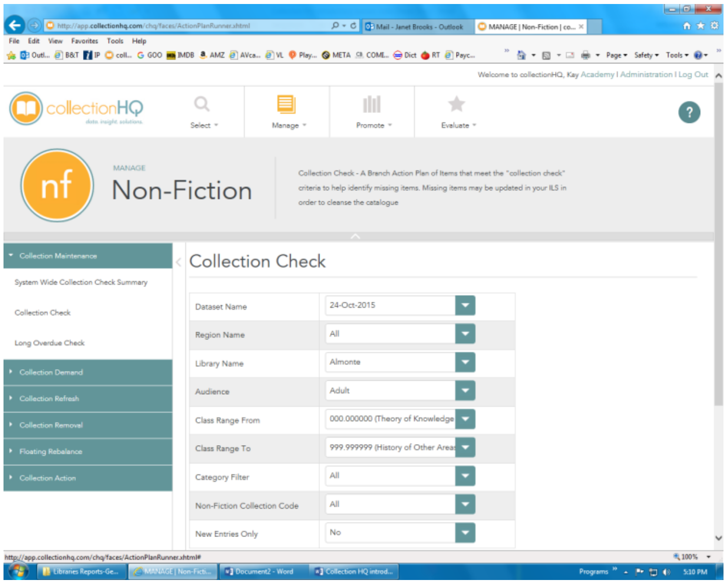


Collection Checks

Prior to working other collection management lists (Grubby Refresh, Dead Items Refresh, etc.) you should complete a "***Collection Check***" for each of the areas of the collection. This report lists items that have not circulated in 4 years or more. *(Please note that in the future, staff will work collection checks that cover items that have not circulated in 2 years or more)* It does not include Reference items or items marked as anything but "on shelf" for your library. Any items not found should be marked as Missing in CarlX.

- If you are not working a scheduled assignment, you can prepare reports for any section of the collection.
- Each section of the collection can be managed by clicking on the "***Manage***" tab and then selecting the area you want to work on, Fiction, Nonfiction, Nonbook, etc. Each section has the same options in the drop down menu on the left side of the screen.
- The drop-down menus include various reports that can be generated for that section of the collection.
- To obtain a "***Collection Check***" report, click on the "***Collection Maintenance***" drop-down menu. There are several ways to configure the reports—a system wide or for each library, and then collection sections within each.

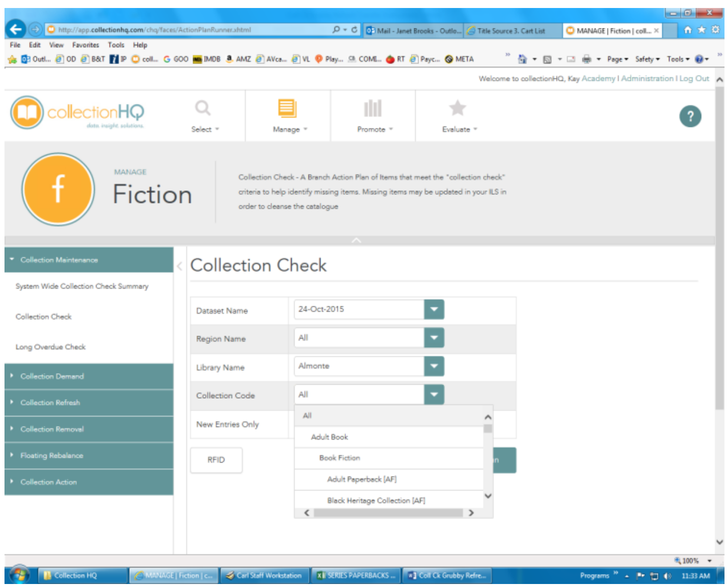
Non-Fiction Collection Check



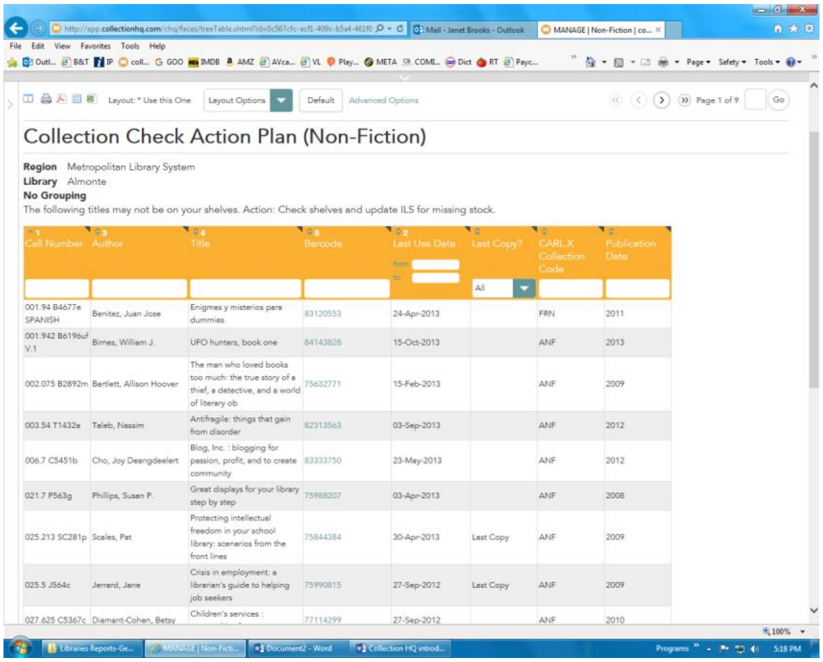
- After you click on "***Collection Check***", a pop-up box will appear on the right side of the screen with drop-down boxes to help you identify what library, area, and audience you want. If you are in the Nonfiction module, you'll have the following options (see the above example):
  - The "***Dataset Name***" will display the most recent dataset automatically.
  - At this time, no "***Regions***" are set up, so leave this box set at "***All***".
  - Choose your library from the "***Library Name***" drop down menu.
  - Determine the "***Audience***" you want, Adult, Juvenile, or Teen/YA.
  - Click on the arrows next to the box for "***Class Range From***" and scroll to the area where you want to start the report. Then click on the area next to the "***Class Range To***" and scroll to the area you want to end the report.
  - Click on the "***Collection Code***" you want to work, if you are working a special collection such as BHC, or Career Guidance (Jobs). Otherwise, leave it at Adult Nonfiction or Juvenile Nonfiction, etc.
  - If you click yes on "***New Entries Only***", displays only items for which this is the first time they have appeared in this action plan.
  - Click Run.

Fiction Collection Checks

- If you are in the Fiction module, you'll have a few less options (see the example below):
  - The "***Dataset Name***" will display the most recent dataset automatically.
  - At this time, no "***Regions***" are set up, so leave this box set at "***All***"
  - Choose your library from the "***Library Name***" drop down menu.
  - Click on the "***Collection Code***" you want to work, (Adult Book, Mystery, Easy, etc.)
  - If you click yes on "**New Entries Only**", displays only items for which this is the first time they have appeared in this action plan.
  - Click Run.



Collection Check Action Plan



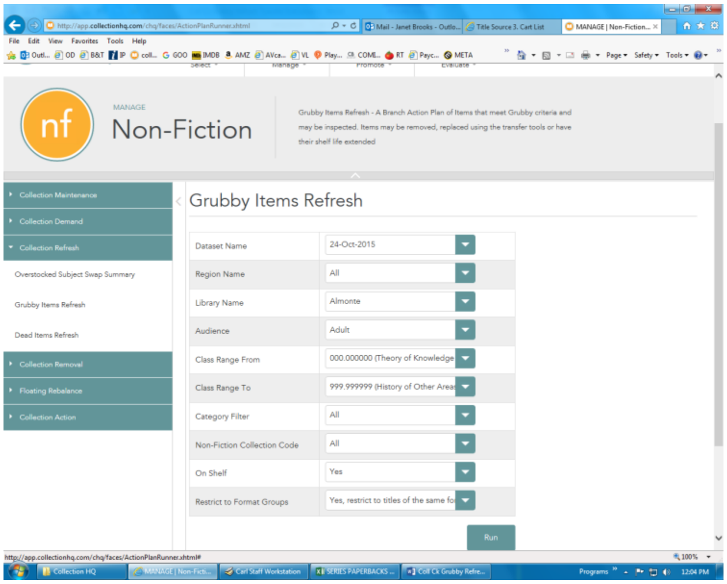
- To aid in viewing the report, Go to the top of the page and click on the drop down menu next to "***Layout Options***" and click on "***Use this One…***". This will give you a predetermined layout that excludes some extraneous information. You can click on the arrow at the left side of the page to see what other columns are available. If you'd like to add these columns back to your report, you can drag and drop them to where you want them.
- You can sort the data in the columns, for example you can sort call numbers in order, or other criteria in order (such as oldest date) by clicking on the header of each column.
- To print out a list to take to the shelves, use the PDF command at the upper left above the report. (CollectionHQ can be used on the iPads each library owns. To access through the iPad, go to Safari, and type collectionhq.com in the search line. You'll be taken to the webpage where you can log in to the program)

Collection Refresh

CollectionHQ has a special set of reports to identify items that circulate very well at your branch and to identify items at other libraries with low circulation and are “dead” that can be used to “refresh” your collection through transfer of those items.

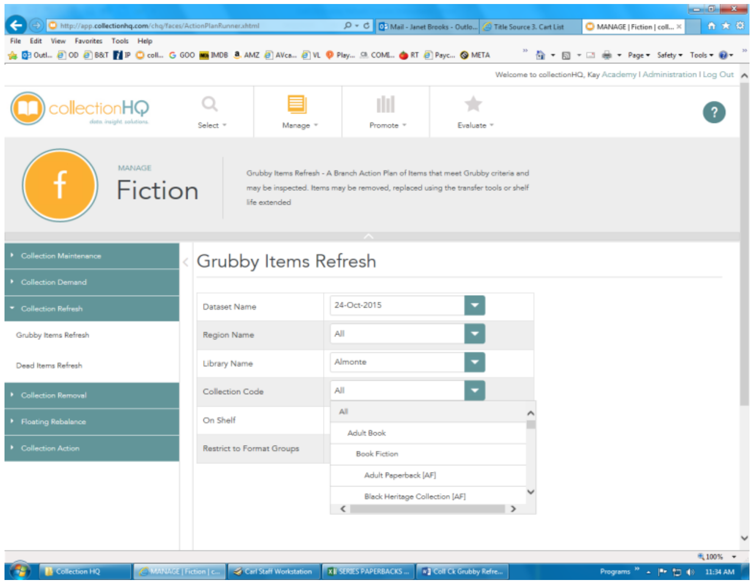
“***Grubby Items Refresh***” is one report found under “***Collection Refresh”***. “Grubby” items are items that have circulated more than a designated number of times. Right now, the default number of circulations is “40” for most libraries. This number can change and it is flexible. As with the *Collection Check*, you can run a *Grubby Refresh* report for any section in your library.

Non-Fiction Grubby Items Refresh



- For Nonfiction (see sample above):
  - After you click on "***Grubby Items Refresh***" a box will pop up on the right side of the screen with boxes to identify library, area, and audience.
  - The "***Dataset Name***" will display the most recent dataset automatically.
  - At this time, no "***Regions***" are set up, so leave this box set at "***All***".
  - Choose your library from the "***Library Name***" drop down menu.
  - Determine the Audience you want to work, Adult, Juvenile, or Teen/YA.
  - Click on the arrows next to the box for "***Class Range From***" and scroll to the area you want to start the report. Then click on the area next to the "***Class Range To***" and scroll to the area you want to end the report.
  - Click on the "***Collection Code***" you want to work, if you are working a special collection such as BHC, or Career Guidance (Jobs). Otherwise, leave it at Adult Nonfiction or Juvenile Nonfiction, etc.
  - "***On Shelf***". This shows the on shelf status of items at the time of extract. By default only items which were on shelf at the time of extract will be returned. To see all items irrespective of whether they were IN or OUT at the time of extract select "***All***".
  - For "***Restrict to Format Groups***" click on "***Yes, restrict to titles of the same format***".
  - Click Run.

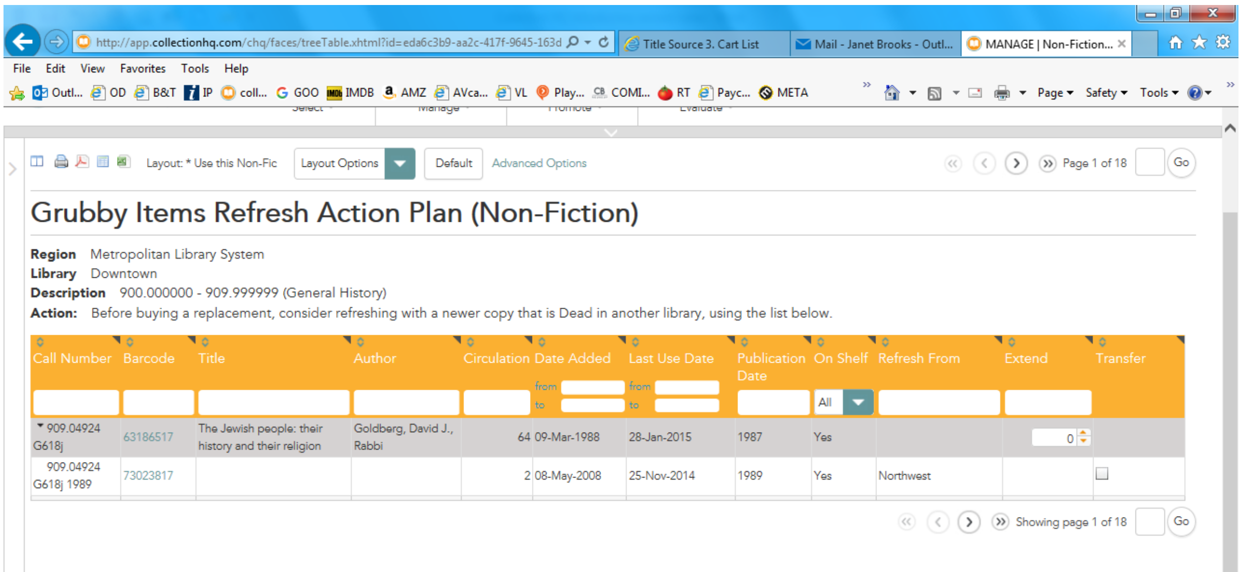
Fiction Grubby Items Refresh



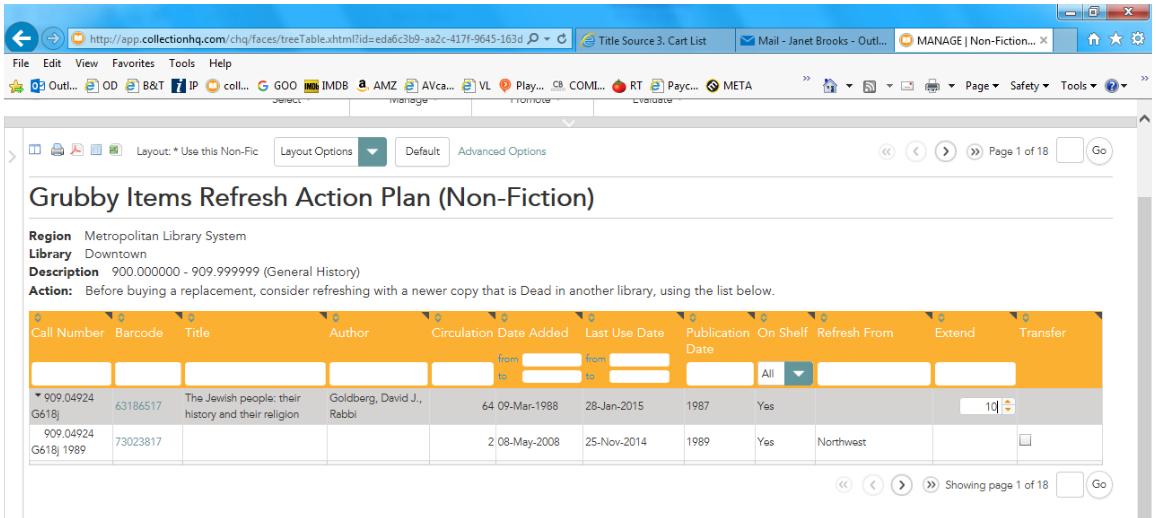
- For Fiction (see sample above):
  - After you click on “***Grubby Items Refresh***” a box will pop up on the right side of the screen with boxes to identify library, area, and audience.
  - The “***Dataset Name***” will display the most recent dataset automatically.
  - At this time, no “***Regions***” are set up, so leave this box set at “***All***”.
  - Choose your library from the “***Library Name***” drop down menu.
  - Click on the “***Collection Code***” you want to work, (Adult Book, Mystery, Easy, etc.)
  - “***On Shelf***”. This shows the on shelf status of items at the time of extract. By default only items which were on shelf at the time of extract will be returned. To see all items irrespective of whether they were IN or OUT at the time of extract select "***All***".
  - For “***Restrict to Format Groups***” click on “***Yes, restrict to titles of the same format***”.
  - Click Run.

Grubby Items Refresh Action Plan

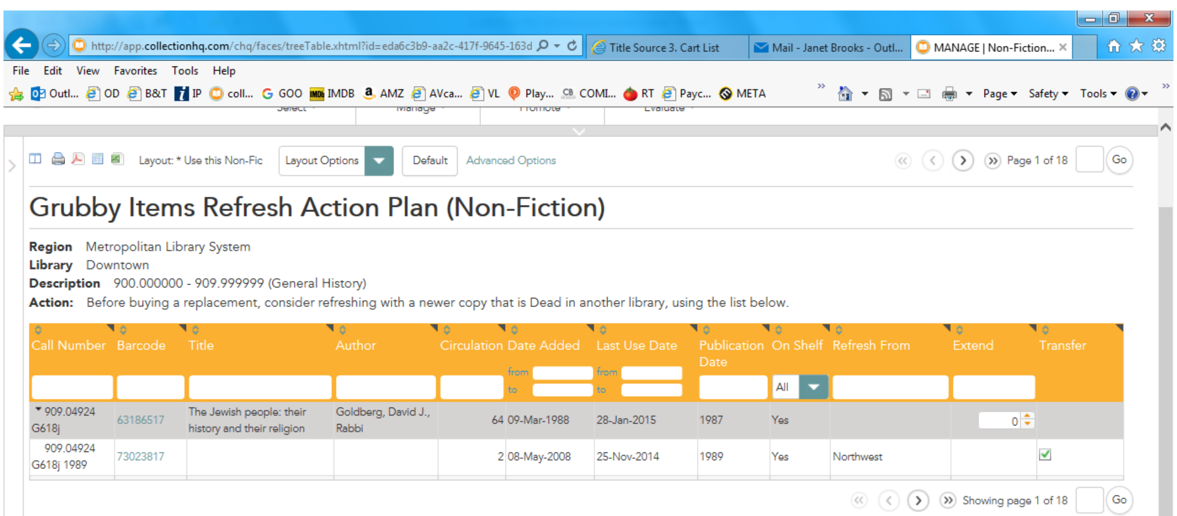
The action plan lists all items in the report that meet the criteria and filters set. In the example below, the item in the grey bar is the item in your library. The items immediately below the grey bar are items at other locations that are available for transfer to your location.



- To aid in viewing the report, Go to the top of the page and click on the drop down menu next to "***Layout Options***" and click on "***Use this One***…". This will give you a predetermined layout that excludes some extraneous information. You can click on the arrow at the left side of the page to see what other columns are available. If you'd like to add these columns back to your report, you can drag and drop them to where you want them.
- You can sort the data in the columns, for example you can sort call numbers in order, or other criteria in order (such as oldest date) by clicking on the header of each column.
- To print out a list to take to the shelves, use the PDF command at the upper left above the report. (CollectionHQ can be used on the iPads each library owns. To access through the iPad, go to Safari, and type collectionhq.com in the search line. You'll be taken to the webpage where you can log in to the program)
- Each title entry shows basic information about the item including call number, circulations, etc.
- For each item there is a column marked "***Extend***". If you have an item that indicates it has circulations over the target amount, but is still in good condition, you can extend the number of circulations so it doesn't show up on a Grubby Items Refresh list until it reaches that new threshold.



- Immediately below an item there will be at least one listing for an item that is available for transfer to your library. Titles offered for transfer will only include titles from another library if they are dead (no longer in use) and in reasonably good condition at that library, and only if they are “available”. Available means that no other user has selected the item for transfer to another library. If a no-entry sign is displayed, someone else has reserved the item for transfer.
- If you want this item transferred to you, click in the check box under the “***Transfer***” column. This will add the title to a Transfer list (see more info below).



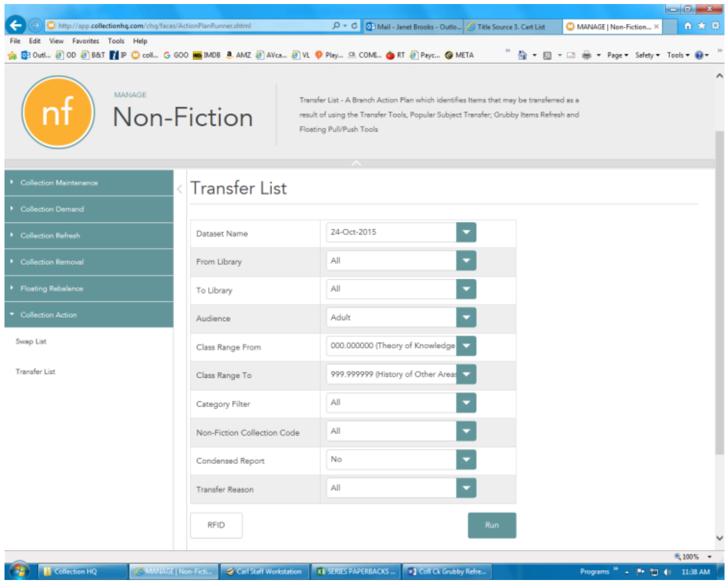
Transfer Lists

Once you have completed the ***Grubby Items Refresh*** report, you need to get copies of the items you marked under the Transfer column. The ***Transfer List*** displays an action plan containing all items that have been selected for transfer through the ***Grubby Items Refresh*** tool, as well as other refreshing tools i.e., Popular Subjects Refresh, etc..

At Metropolitan Library System, we are bypassing a couple of the preprogrammed steps CollectionHQ provides when it comes to Transfer Lists. Following are procedures for obtaining and processing Transfers.

- Click on the drop down menu next to "***Collection Action***" in the box on the left side of the screen.
- Click on "***Transfer List***".

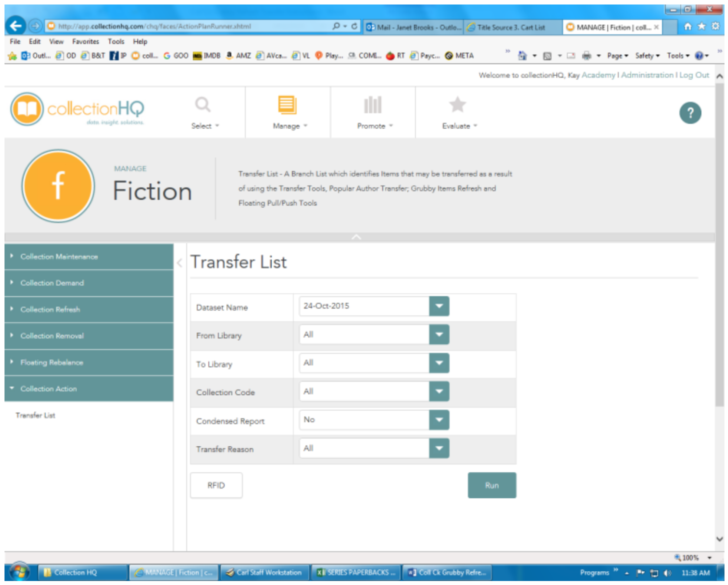
Non-Fiction Transfer Lists



For Nonfiction (see above example):

- To find out what titles/items were marked for transfer in the ***Grubby Items Refresh*** report, click "***All***" in the "***From Library***" box and your library name in the "***To Library***" box.
- You can designate a portion of the collection by clicking on the "***Class Range From***" and "***Class Range To***" boxes. This will bring up the list that you generated.
- "***Nonfiction Collection Code***". The collection code that is assigned to this non-fiction collection in your ILS. Please note: the Action Plan will only display results that are applicable to the selected Non-Fiction Collection Code and that fall within the selected Audience group and other selected parameters. (ANF, JNF, YNF, BHC, etc.)
- **"Condensed Report".** Select whether the results should be condensed when printed or whether the results for each library branch appear on separate printed pages.
- "**Transfer Reason**" - Select a transfer type to narrow the results in the action plan. Usually, you'll be working from a ***Grubby Items Refresh*** report. Leave this on "***All***" in case other reports were used.
- Click Run

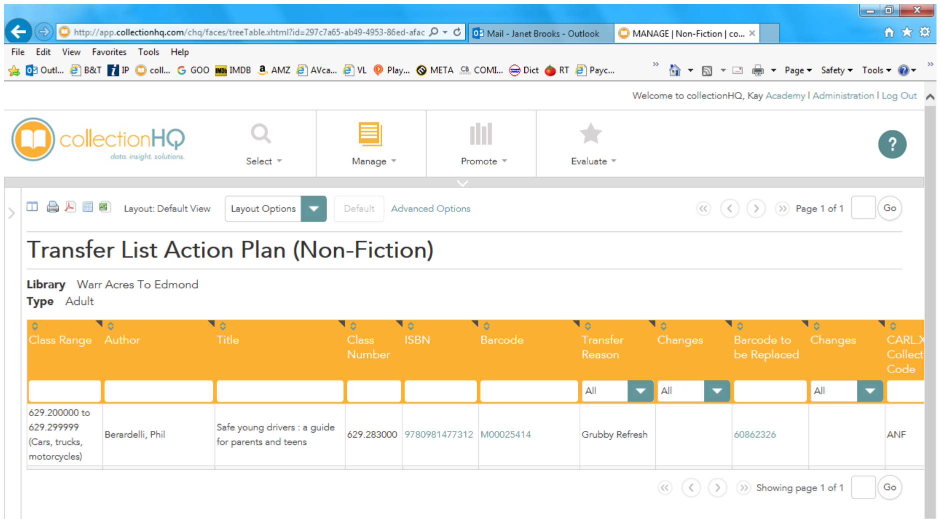
Fiction Transfer Lists



For Fiction:

- To find out what titles/items were marked for transfer in the ***Grubby Items Refresh*** report, click "***All***" in the "***From Library***" box and your library name in the "***To Library***" box.
- "***Collection Code***". The collection code that is assigned to this non-fiction collection in your ILS. Please note: the Action Plan will only display results that are applicable to the selected Non-Fiction Collection Code and that fall within the selected Audience group and other selected parameters. (Adult Book, Mystery, Large Print, Easy, etc.)
- ***"Condensed Report***". Select whether the results should be condensed when printed or whether the results for each library branch appear on separate printed pages.
- ***"Transfer Reason"*** - Select a transfer type to narrow the results in the action plan. Usually, you'll be working from a ***Grubby Items Refresh*** report. Leave this on "***All***" in case other reports were used.
- Click Run

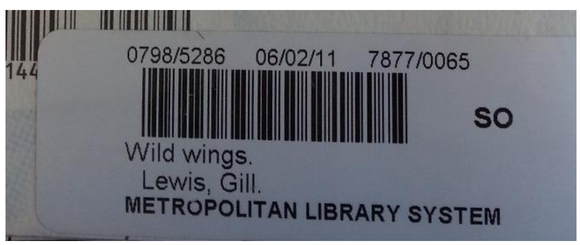
Transfer List Action Plan



The Transfer List Action Plan lists all the titles selected for transfer. The report shows the title of the item, Barcode of the item, Barcode of the item selected for transfer.

Processing Transfers

- Libraries need to have a library card specifically designated for the purpose of placing holds for transfers. (Similar to the library cards used for Traces)
- The Library Card should be named using the following naming scheme: ***@XXxfr*** (ex. @DNxfr)
- From the ***Transfer List Action Plan***, place ***Item Level Holds*** in **Carl-X** for each item on your list using the number in the "***Barcode***" column. Be careful <u>not</u> to use the number in the "***Barcode to be Replaced***" column, which is the item you own and are replacing with the transfer.
- The requested transfer item will show up on the owning library's daily Holds report and should be processed as any other hold.
- When the item is received at the requesting library, staff need to change the location from the original library to their library.
- After the change in library location, staff need to affix a new library abbreviation label over the original library designation on the spine and on the barcode label using Arial 10 Bold font.



- Once you have processed the new transfer copy, withdraw the old grubby item through Carl-X, using normal withdrawal procedures.