

## Copac Collection Management Tool Project

### Optimal Workflow Guide – University of Sheffield

#### Introduction:

This optimal workflow guide has been developed for libraries using the CCM tool for the withdrawal of monographs and conversely to identify monographs for retention i.e. unique copies. It is based upon trials with the tool carried out at the University of Sheffield Library between December 2011 and March 2012.

#### Optimal Workflow:

##### **1. Use the local Library Management System (LMS) to generate lists of potential items for withdrawal/ retention, using locally defined criteria.**

Different LMSs will have different ways of being used and different institutions will have different criteria for withdrawal/ retention, but ultimately the aim is to obtain a comma delimited list of ISBNs, local record numbers, or Copac record numbers, of potential items for withdrawal/ retention, saved as a comma-separated values (CSV) file, for use in 2. below.

##### **2. Upload a file of comma delimited standard numbers into the CCM Tool**

Open the CCM Tool (Beta interface). Select the 'Uploading a file' tab. Click on the 'Browse' button and find the CSV file of ISBNs, local record numbers, or Copac record numbers from 1. above. Upload the filename into the 'Upload filename' box and select the appropriate 'Number type' using the arrow in the 'Number type' box.

##### **3. Limit the search results**

Limit your search results by selecting the appropriate number of holding libraries using the arrow in the 'Display records with' box. Limit your search results further by selecting the appropriate libraries using the arrows and/or sliding tab in the 'Library' boxes. Finally limit your search results by selecting the appropriate region using the arrow in the 'Region' box.

##### **4. Tailor the search**

Tailor your search by selecting the appropriate deduplication option using the arrow in the 'Deduplicate' box. Click on the 'Explain deduplication' link if you require further clarification about the deduplication options available.

##### **5. Run the search**

When you are happy with your search selections click on the 'Search' button to start the search. The search will run and you will be taken to another page which lists details of your file and search criteria. It also allows you to subscribe to a Batch Search RSS feed so that you will be notified when the search process is finished. Depending on the size of the file and the search options chosen, a results file will usually be ready for you to look at within a few minutes. If you do not wish to subscribe to a RSS feed you can click on the 'Copac Collection Management' heading at the top of the page. This will return you to the front page of the Tool. You can then select the 'Uploading a file' tab, and click on the 'Search history' button which will bring up an updated results screen with your results file at the top of the page. This can be repeated until the search process is completed and the results file ready to use.

## **6. Obtain results**

When the results file is ready to be used click on the filename. This will take you to another page where the results are displayed. The number of results is given at the top of the page and then the results are listed below that. Each of the results gives the title of the item, some bibliographical information, its control number and which libraries it is located at.

## **7. Visualize search results**

To visualize the results click on the 'Visualisation of search results' button. This will take you to a page where the search results are displayed on two graphs and a map. The page also gives you the option to export the graph data, map data or MARC data.

## **8. Export graph data**

Select 'Graph data' and click on the 'Export' button. You will be asked to open or save the resulting CSV file. Save the file.

## **9. Refine data using withdrawal/ retention criteria**

Open the CSV graph data file and work on it to remove any data that is not relevant e.g. if you are only wanting to withdraw items that are held in 8 libraries or more, then you can sort / filter the list and remove any items that are held at 7 or less libraries.

## **10. Import refined data into the LMS to generate lists to locate the items for withdrawal/ retention work**

Once you have got the data you require then you can enter the record numbers of the items back into the LMS, to generate shelf lists to identify the items for further withdrawal/ retention work, following local withdrawal/retention work procedures.