STRATEGIC WEEDING & COLLECTION USE IN ALMA

A PRACTICAL OVERVIEW

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CALIFORNIA STATE UNIVERSITY FULLERTON POLLAK LIBRARY

BACKGROUND

Unified Library Management System

The CSU libraries working smarter together.

- Large, Ongoing Weeding Project

- CSU Fullerton has 40,000+ Students

- Substantial Remodel Underway

- Library Space in High Demand

- Historical Government Documents Collection growing since 1963

- ULMS Project – 23 campuses all migrated to ALMA in 2017
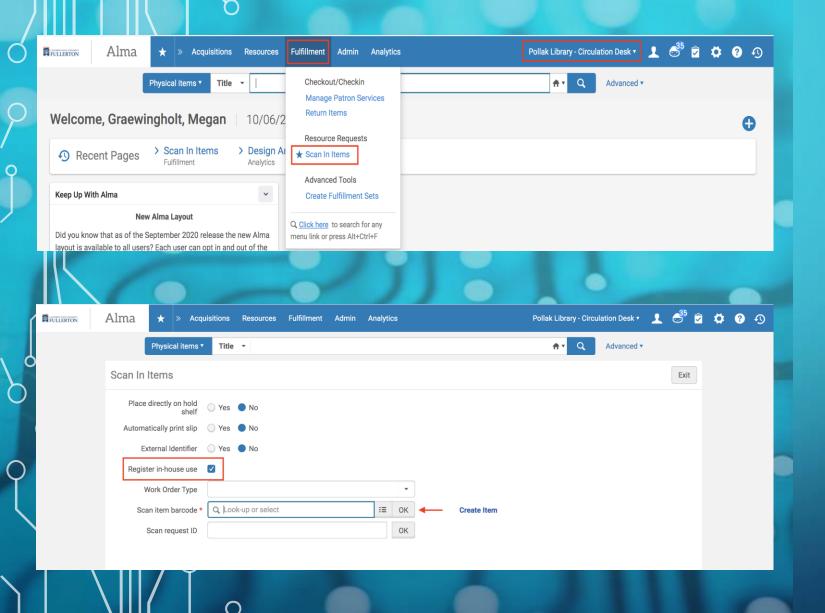
- Resource Sharing

- Powerful Analytics

LET'S DO A POLL

ALMA, REPORTS, AND TRACKING COLLECTION USE

DISCLAIMER

THIS PRESENTATION AND THE ADVICE PROVIDED **DOES NOT** SUPPLANT ANY OFFICIAL WEEDING GUIDELINES REQUIRED THROUGH YOUR REGIONAL LIBRARY OR GPO. IT IS MEANT TO PROVIDE AN OVERVIEW OF USING ALMA FOR BUILDING WEEDING **STRATEGIES** AND ASSESSING COLLECTION **USE**.

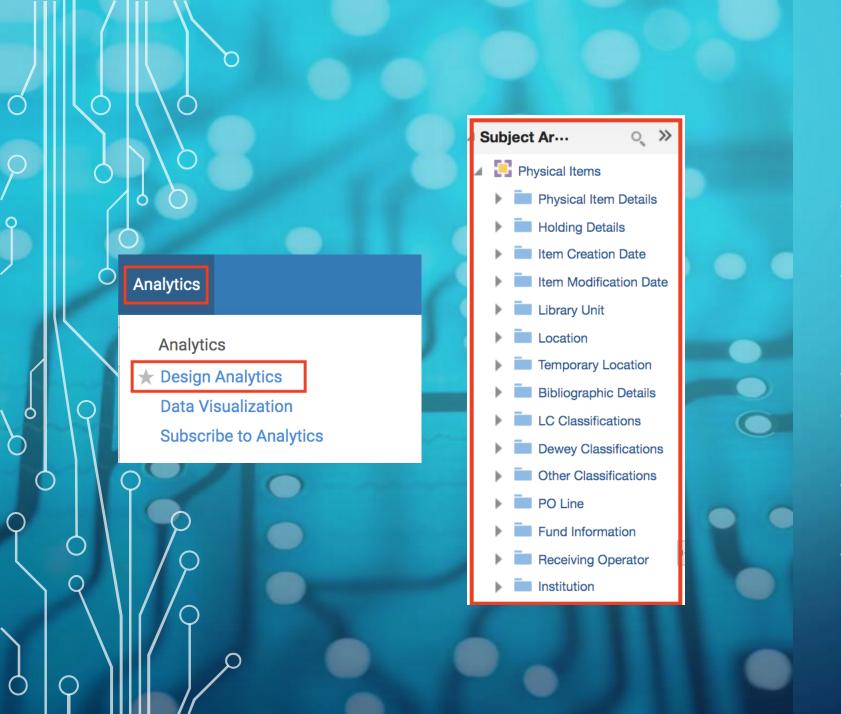PLEASE KEEP IN CONTACT WITH YOUR REGIONAL WHEN WEEDING.

PREVIOUSLY APPROVED FDLP DISPOSAL LIST OFFERS MAY NOT BE AVAILABLE EVERYWHERE, FUNCTIONALITY MAY BE LIMITED.

FOR MORE INFORMATION ON WEEDING GUIDELINES THROUGH GPO, PLEASE VISIT FDLP.GOV AND THE FDLP ACADEMY FOR ADDITIONAL WEBINARS.
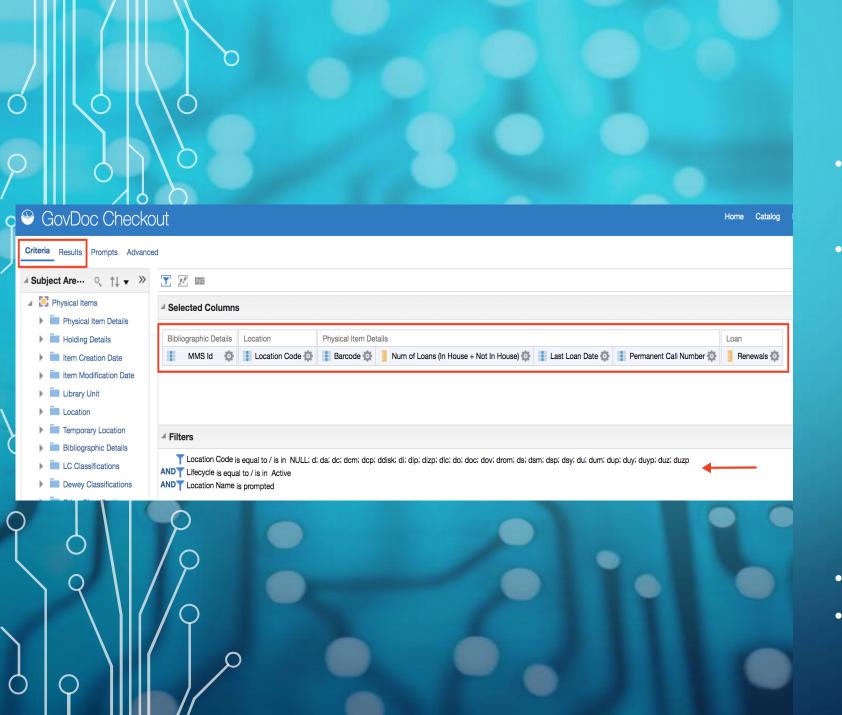
IN-HOUSE USE

- **Ideal for Non-Circulating Material**

- **Allows for Data Collection**

- **Sets Up "Desks" for Workflow Coordination**

- **Most Often Used for Course Reserves**

- **Works for Sub-Collections**

- **Quick Process**

- **"Scan In Items" with In-House Box Selected**

- **Data Can Be Queried Later**

ALMA REPORTS

- **Like many Library Management Systems, ALMA has robust analytics**

- **Queries the system to create lists of library items within specified parameters**

- **Initial reports need to be designed**

- **After they've been created, they can be saved or adapted**

- **Get to know fellow colleagues who regularly build and use reports**

- **Team Work Makes the Dream Work**

Analytics

Analytics
★ Design Analytics
Data Visualization
Subscribe to Analytics

Subject Ar…

- Physical Items
  - ▶ Physical Item Details
  - ▶ Holding Details
  - ▶ Item Creation Date
  - ▶ Item Modification Date
  - ▶ Library Unit
  - ▶ Location
  - ▶ Temporary Location
  - ▶ Bibliographic Details
  - ▶ LC Classifications
  - ▶ Dewey Classifications
  - ▶ Other Classifications
  - ▶ PO Line
  - ▶ Fund Information
  - ▶ Receiving Operator
  - ▶ Institution

CIRCULATION REPORTS

- **Most important areas to remember are setting the Criteria and checking Filters (IN RED)**

- **Parameters**
  - **MMSID**
  - **Location Code (Prompted)**
  - **Barcode**
  - **Number of Loans (In-House & Not)**
  - **Last Loan Date**
  - **Permanent Call Number**
  - **Number of Renewals**
  - **Title**
  - **Author**
  - **Lifecycle**

- **Click on Results Tab to Run**

- **Options to export in Excel, CSV, Tab Delimited, or XML**

HOW IS THIS DATA HELPFUL?

- BUILD COLLECTION VALUE AMONG COMMUNITY AND ADMINISTRATION

- GAUGE USAGE AND PROMOTE COLLECTION MATERIAL

- SUPPORT DECISION-MAKING FOR NEW SELECTIONS OR DESELECTIONS

- SUPPORT DECISION-MAKING FOR WEEDING STRATEGIES

- AID IN RECOMMENDATIONS FOR SUPPLEMENTAL MATERIAL

PREVIOUSLY APPROVED FDLP DISCARD LIST MATERIALS

- **Making connections between reports**

- **The list contains material already cleared through a time consuming step in the approval process**

- **Materials still need be offered to California selectives through CALDOC-L and to the larger GPO community**

- **Saves Regionals Time**

- **List is updated periodically**

- **ALMA can help target material on the list that is found in your collection using analytics**

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DISCARD PROCEDURES FOR CALIFORNIA SELECTIVE FDLP LIBRARIES

Materials to Omit from Disposal Lists

Disposal lists, with the noted exceptions, need not include the following materials, and can be disposed of without offering them to the CSL or California's other selectives. Offering them to public libraries or educational institutions in your area before recycling or discarding them is encouraged.

- Superseded materials.
- Pamphlets (i.e., print publications less than 24 cm tall with at most 20 pages) held at least five years.
- Microfiche held at least five years, unless discarding a long run of a particular title (five or more years or 100 or more numbers of a serial).
- CD-ROMs and DVD-ROMs held at least five years.
- Congressional committee hearings and prints classified Y 4, issued after 1960, and held at least five years unless they are about:
  - California or California issues (e.g., federal water allocations in the western states),
  - American Indians in the western United States, or
  - A major historical event or issue (e.g., Kennedy Assassination, Iraq War, Social Security reform).

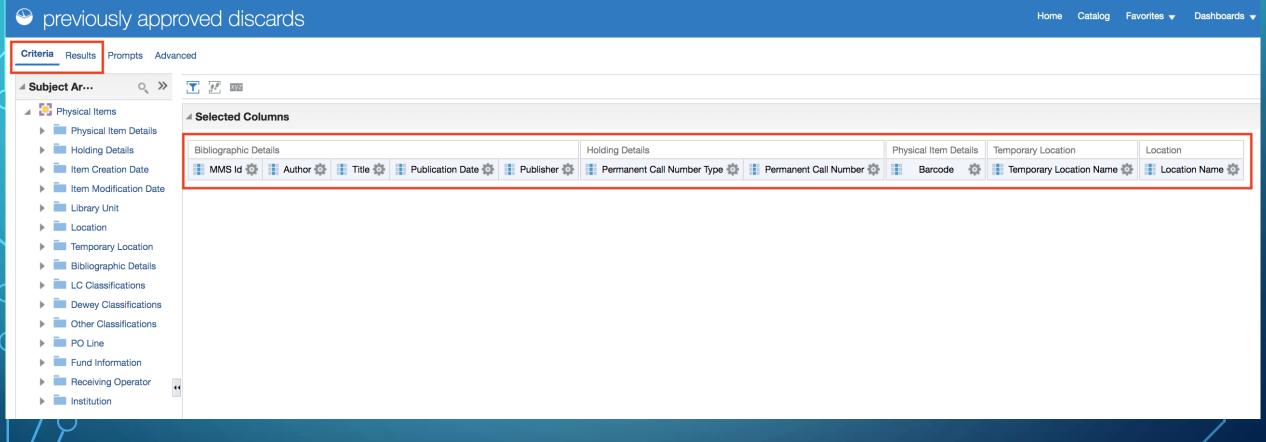### Materials to Offer California's Selectives but not the CSL

The materials described below need not be offered to the CSL, but would be offered to California's other selectives. Each list is updated periodically. Please offer materials to selectives via CALDOC-L as you would other offers not claimed by the CSL using the standard disposal list format. Both CALDOC-L offers and the standard format are described later in these procedures.

- Materials previously offered to the CSL by selectives as listed in our **Previous FDLP Disposal List Offers** list.
- Congressional Record volumes not included on, or having the condition requested in, our **CSL Congressional Record Needs list**.
- Serial Set volumes not included on, or having the condition requested in, our **CSL Serial Set Needs list**.

EXAMPLE OF REPORT

LET'S DO A DEMO!

FINAL THOUGHTS

- PRACTICE MAKES PERFECT, ASK FOR HELP

- LOCAL PRACTICES MATTER

- BUILD SUPPORT USING DATA WHERE YOU CAN

- THERE ARE MANY WAYS TO RUN REPORTS, GET CREATIVE

- QUESTIONS ?

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