Leveraging your investment in EAST: A series of perspectives
Ruth Fischer

OCLC/Sustainable Collection Services
EAST Member Meeting
Taking full advantage of GreenGlass

Ruth Fischer – OCLC/Sustainable Collection Services
GreenGlass was purpose built

- To help groups like EAST understand their shared collection as a single collection and to come to consensus about an appropriate retention model.

- To provide individual libraries with the tools to understand their own collection in the context of the collective collection, and to make efficient, well-informed decisions about what to withdraw, while protecting their committed retentions.
GreenGlass access

EAST Cohort 1
through October 2018

EAST Cohort 2
through January 2021
Registering retentions in WorldCat

• There is no additional cost for this service; it is included in your OCLC cataloging subscription fees.

• Libraries will use GreenGlass to create a file of retained titles for upload to OCLC – containing OCN and bib rec # --- and complete an online form with 583 field action note details. (Update your retention commitments!)

• This process will create a new shared-print LHR in WorldCat and this approach makes the second SP symbol obsolete.
Explore GreenGlass Remediation Lists

<table>
<thead>
<tr>
<th>Total Record Counts</th>
<th>Titles</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Records</td>
<td>1,141,330</td>
<td>1,317,541</td>
</tr>
<tr>
<td>All Records - Filtered</td>
<td>1,047,154</td>
<td>1,178,565</td>
</tr>
</tbody>
</table>

Remediation Lists

In preparing your library’s data for GreenGlass, SCS has compiled several lists that may help to improve the correctness of your records, the completeness of your WorldCat holdings, and/or the efficacy of your collection. View Remediation Lists
Lots of academic libraries see multiple copies to be low-hanging fruit for weeding.

EAST expects you to retain one copy of titles committed for retention.

Your list of Possible Duplicates is one of the ‘Remediation Lists’ in GreenGlass.

There is a tutorial that will help you navigate the list.
<table>
<thead>
<tr>
<th>OCLC NUMBER</th>
<th>LOCATION</th>
<th>ENUMERATION</th>
<th>COPY NUMBER</th>
<th>POSSIBLE DUPLICATE</th>
<th>TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000035</td>
<td>ONLINE-STACK</td>
<td></td>
<td>Yes</td>
<td></td>
<td>A new dictionary of the English and Italian languages, containing the whole vocabulary in general use with copious selections of scientific, technical and commercial terms, and others lately brought into use with the pronunciation figured, by Arthur Enenkel; rev. and cor. by J. McLaughlin. / Philadelphia, D. McKay [1912]</td>
</tr>
<tr>
<td>1000035</td>
<td>ONL-NDL_STACK</td>
<td></td>
<td>Yes</td>
<td></td>
<td>A new dictionary of the English and Italian languages, containing the whole vocabulary in general use with copious selections of scientific, technical and commercial terms, and others lately brought into use with the pronunciation figured, by Arthur Enenkel; rev. and cor. by J. McLaughlin. / Philadelphia, D. McKay [1912]</td>
</tr>
</tbody>
</table>
Identify Multi-Edition Titles

• GreenGlass is the only library system that takes advantage of the OCLC Work ID.

• This link pulls together multiple editions of the same work, making it possible for experts within GreenGlass libraries to conveniently determine which editions have been superseded, and which editions should be retained.

• Your list of Multi-Edition Titles is one of the ‘Remediation Lists’ in GreenGlass.

• There is a tutorial that will help you navigate the list.
<table>
<thead>
<tr>
<th>OCLC WORK ID</th>
<th>OCLC NUMBER</th>
<th>CALL NUMBER</th>
<th>LOCATION</th>
<th>TITLE</th>
<th>EDITION</th>
<th>OPAC</th>
</tr>
</thead>
</table>
Cataloging Support

• Records for which SCS has assigned an OCN

• Records without OCNs

• Titles with an author/title risk

• Holdings not set
Out-of-Scope Items

- Contains all of the GreenGlass data elements for every item, including location, call number, overlap tallies, HathiTrust status, usage data, URLs, etc.

- There is a tutorial that will help you navigate the list.
Known-Item Search

- Allows GreenGlass users to retrieve an item or a set of items by barcode number, bib record number, OCN, or Work ID

- Quick answers to questions about retention

- Replacement questions or projects
<table>
<thead>
<tr>
<th>CALL #</th>
<th>LOCATION</th>
<th>TITLE</th>
<th>OPAC</th>
</tr>
</thead>
</table>

**LOCAL TRANSACTION DATA - TITLE LEVEL**

| Recorded Uses | 4 |
| Allocated for Retention | Yes |

**FORMATS**

| Bib Record Type | Book |
| Primary Language | eng |
| Possible Duplicate | No |

**GROUP DATA**

| EAST Holdings | 12 |
| Aggregate Uses | 135 |
| Ephemera | No |

**WORLDCAT HOLDINGS**

| US Holdings | 210 / 3,470 |
| Massachusetts Holdings | 8 / 114 |
| Comparator Libraries | 34 / 75 |

**OTHER**

| HathiTrust IC/PD | Yes / No |

**COMPARATOR LIBRARY HOLDINGS**

| Maine Shared Collections | 1 / 7 |
| Regional Large Academic Libraries | 16 / 20 |
| Regional College Libraries | 4 / 13 |
| Boston Library Consortium (BLC) | 5 / 13 |
| CNY Retention Partners | 0 / 0 |

**EAST HOLDINGS**

- Boston College *
- Boston University
- Bryn Mawr College
- Connecticut College
- Loyola Notre Dame *
## HathiTrust URLs

<table>
<thead>
<tr>
<th>Category</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater than 3 recorded uses</td>
<td>38,859</td>
<td>11%</td>
</tr>
<tr>
<td>Publications more than 10 years old</td>
<td>296,585</td>
<td>87%</td>
</tr>
<tr>
<td>More than 100 US holdings - same edition</td>
<td>388,777</td>
<td>88%</td>
</tr>
<tr>
<td>Fewer than five US holdings - any edition</td>
<td>12</td>
<td>0%</td>
</tr>
<tr>
<td>Unique in Tennessee - any edition</td>
<td>2,427</td>
<td>1%</td>
</tr>
<tr>
<td>In HathiTrust - in copyright</td>
<td>158,259</td>
<td>46%</td>
</tr>
<tr>
<td>In HathiTrust - public domain</td>
<td>17,841</td>
<td>5%</td>
</tr>
<tr>
<td>Ephemera</td>
<td>2,382</td>
<td>1%</td>
</tr>
</tbody>
</table>
Sub-Group Functionality

- Additional analysis for libraries within a specific region
- Subject analysis
- Prospective/coordinated purchasing
Participant holdings

Group Overlap tallies (for participant libraries) always represent exact edition matches – using the O\n
tallies are calculated by SCS using the bib records we received from each participant library. All other

on holdings set in WorldCat.

PARTICIPANT HOLDINGS OVERLAP
The type of chart above is called a "treemap". Treemaps are useful for displaying large amounts of hierarchically structured information. This treemap uses rectangles that are sized and ordered by the number of title-holdings in the group. Color also represents quantity, with a gradient from red representing the high, yellow near the average and blue at the low end. The first view shows all title-holdings by LC Class. Click on an LC Class and you will see the breakdown of related LC sub-classes. Click on an LC sub-class to see the breakdown of individual library holdings. Very often the largest library in the group will appear in the largest (red/left) rectangle but we encourage you to look for sub-classes where this is not the case.
THANKS!
Karen Bohrer & Ray Schmidt
Wellesley College
Leveraging EAST at Wellesley College

Karen Bohrer & Ray Schmidt

EAST Member Meeting
October 13, 2017
Case 1: Curating a branch library’s collection
Wellesley is renovating its Science Center which includes a branch library housing approximately 85,000 items.

There will be space for no more than 2,000 items in the renovated facility.
Our plan

- Absorb a portion of the collection into the main library (no more than 25,000 items)

- Send a portion to remote storage (space and cost issues)

- Purge the rest
  - Of course, those books that Wellesley has committed to retain will go to the main library or to accessible storage.
Our message

- Students and faculty will continue to have access to the content currently housed in the Science Library.
Wellesley’s participation in EAST has made communicating with faculty far easier. They are reassured that they will have access to print books that we decide to purge.

Librarians can use GreenGlass to more easily identify candidates for weeding since it has local data as well as the holdings of other libraries.
Case 2: Conducting an inventory
Using GreenGlass to generate an inventory list

- **Background:** previous main library stacks inventory studies (10% sample of entire collection, high-circulating items, DVDs)

- **Spring–Summer 2017:** conducted an inventory of unique holdings using a list of volumes generated in GreenGlass
Creating and refining the inventory list

- Filters:
  - Clapp Library
  - Same edition
  - US holdings fewer than 2

- Exported spreadsheet of 1,930 volumes (1,520 titles)

- Narrowed down by excluding 231 preservation photocopies
Creating and refining the inventory list

LOCATIONS

Locations
- All location codes
- Specific locations

Find

<table>
<thead>
<tr>
<th>Location</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARTTT</td>
<td>62,434</td>
</tr>
<tr>
<td>CLAPP</td>
<td>399,831</td>
</tr>
<tr>
<td>MUSIC</td>
<td>14,245</td>
</tr>
</tbody>
</table>

WORLDCAT® HOLDINGS

Include items available elsewhere:

Edition matching
- same edition
- any edition

US holdings
- fewer than 2
Results

- 6 missing that are committed for retention in EAST
- 2 missing that are not committed for retention (out of scope for EAST cohort 1)
- 2 requiring further investigation (apparently journal analytics)
- Missing volumes will be replaced or reported to EAST this fall
Conclusion

- Future availability of EAST’s GreenGlass data and functionality?

Thank you!
Dzintra Lacis
Brandeis University
Eastern Academic Scholars Trust (EAST)

Implications for Interlibrary Loan

Dzintra Lacis
Oct 13, 2017
Introduction

Resource sharing and collections are changing

EAST – Access

Interlibrary Loan Best Practices and Workflows

Lost and damaged books

RapidILL and RapidR

What next? Conclusion
EAST

Some 6 million monographs have already been identified for retention by the EAST project, and a serials validation study is coming soon.

The EAST shared print collection is a distributed collection

EAST has 60 member libraries ranging from New England to Florida
Access

Materials must be available for circulation to other EAST libraries

EAST lending network-
Interlibrary loan services are the means by which library patrons can obtain loans or scans of materials that are no longer held locally.
Best Practices

https://eastlibraries.org/access

Main points:

Fees – so far no libraries are charging others

Loan periods – 8 weeks

Loans may be Library Use Only – based on condition or rarity

Packaging – take care to protect the contents

Shipping – expedited, and trackable if possible

Scanning – digital delivery is preferred. Scan in color when present and OCR
ILL workflow

Lending:

We can easily identify requests from other EAST libraries. We can check if an item is a retention item, the statement “Committed to Retain” is visible in our discovery system. Scan and delivery digitally where possible. Don’t arbitrarily cancel requests from EAST libraries.

Borrowing:

Create an EAST custom holdings group to streamline ordering. Book chapters are a good way to share content.
Lost books and damaged books

ILL staff will send an invoice to the borrowing library for lost or damaged items.

When replacing a lost or damaged item with EAST retention commitments, refer to the document “Operating Procedure: Replacing Lost or Damaged Items with Retention Commitments” on the EAST website.
RapidILL and RapidR

Rapid is known for fast, streamlined borrowing and lending

There is a Rapid pod for EAST members, although participation is not compulsory

Rapid participants can share articles, book chapters and books

Book chapters are an ideal way to share content from retention items

As EAST takes on serials retention, with Rapid we already have infrastructure in place for fast and efficient sharing of articles
Conclusion

Resource sharing and collections are evolving - increasing reliance on shared print collections

As EAST member libraries begin to weed their collections around EAST retention items, sharing between EAST libraries will become more important

More interlibrary loan requests will be filled through scanning and digital delivery

Interlibrary loan is essential to the functioning of a shared print repository!
Lindsay Cronk
University of Rochester
Mischief Managed

EAST and Collection Management at the River Campus Libraries
In Brief

• Introduction
• Integrating EAST Data
• Early Projects
• Next Steps
• Questions and Answers
Introduction
What the Data Said.
When EAST met the Annex
EAST-Empowered Decision Making

Special Thanks to Sara Amato
Next Steps
Thank you!

Any questions?
EAST: Leveraging Monograph Commitments
Overview

- The UMass Amherst Libraries are EAST retention partners for monographs and serials.
- After monograph retention commitments were entered into our ILS, we developed replacement and withdrawal workflows around these retentions.
- Those workflows help us determine when we can leverage our EAST monograph commitments when withdrawing and replacing materials.
- Additionally, we found that we can use the EAST retention database for vetting gifts and determining what we might not want to add to our collection.
  - https://east-retention-db.appspot.com/
Replacement Workflow part 1

- When an item has an EAST commitment
  - If we have another copy, the other copy will be retained for EAST
  - If we can locate a suitable replacement, we order a replacement copy
  - In both cases, we withdraw the EAST commitment from the item record
  - We add an EAST retention note to the other copy or replacement book
    - 583 field note; EAST replacement copy [date, initials]
Replacement Workflow part 2

- If we cannot find a suitable replacement copy
  - Add WDN to item status
  - Add an internal note to the withdrawn item record: EAST withdrawn [date, initials]
  - Search the Five Colleges catalog to see if there is another copy in the Valley and if so
    - Check the EAST Retention Database (https://east-retention-db.appspot.com/) to see if the other library already has a commitment
    - Contact the other library (or repository) to see if they will take over the commitment
    - Report to Sara Amato
      - We cannot replace a commitment OR
      - Another library (or repository) will take over the commitment
  - Problem: We only retain one copy in the Valley
Example: Vetting a Request part 1

A librarian from another EAST monographs retention partner reached out to one of our librarian:

- I am looking to do some weeding of Baker's Biographical Dictionary.
- UMass has many (but not all of the editions) and have been assigned EAST: Commitment for many of the editions, but not the ones I cite below.
- I feel that I can at least weed the volumes that UMass has committed to keep,
- QUESTION: Would you like to consolidate all the editions of Baker's at UMass? These have no East Commitment (I don't know what their thoughts were on this) but I can offer you:
  - BTW, no one else in the Five Colleges has dealt with this issue, and have just kept their editions.

Our librarian suggested that we acquire and retain all editions as EAST commitments.
Example: Vetting a Request part 2

Review of EAST Retention Database showed 12 (unique) retentions throughout the region, and those included the volumes we were being asked to accept.

- Connecticut College – 1 copy
- Trinity College – 3 copies
- Wesleyan University – 1 copy
- UMass Amherst – 4 copies
- Swarthmore College – 2 copies
- Boston University – 1 copy

Response: We can certainly accept these 3 volumes that we do not own. However, we would not place an EAST retention against them as all 3 volumes have retention commitments with other EAST libraries. One parameter of the EAST program it to spread retention out over a diverse geographical area.
Sally Krash
interim Associate Dean for
Content & Discovery
UMass Amherst Libraries
krash@umass.edu
Thank you.