



Library Automation Planning / Implementation Guide

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Contents

Introduction	1
The Five Components of INFOhio	1
Library Automation Timeline	3
Library Automation Checklist	4
Implementing Library Automation	5
Contact NOECA for initial meeting	5
Finalize agreement with NOECA	5
Order and install equipment; connect to NOECA	5
Weed your collection; update shelflist	6
Convert your holdings records to electronic format	7
Setting Sirsi K-12 Library Policies	8
Begin training on Sirsi K-12	8
Load electronic records at NOECA	8
Place Barcodes on materials	9
Patron records created and loaded by NOECA	9
Implement the new system	9
Instruct educators and students	9
INFOhio Item Groups	10

Introduction

INFOhio is the Information Network for Ohio Schools. INFOhio contains five components: Library Automation, Union Catalog, Media Booking, Electronic Resources, and Instructional Development.

<http://www.infohio.org/>

The Five Components of INFOhio

- **Library Automation** - INFOhio uses the Sirsi K-12 library software. School libraries use this software to locate, loan, and manage library materials. This sophisticated library automation software allows member schools to use several modules:

- CAT/CAT JR. is the user-friendly INFOhio Web-based catalog which includes content enrichment and allows patrons to search for resources from the libraries in their district and in other libraries.

<http://web2.noeca.esu.k12.oh.us>

- Cataloging. Bibliographic records can be downloaded into Sirsi K-12, using SmartPort, from databases such as INFOhio's Curriculum Resource Catalog and the Library of Congress. Vendor disks can also be loaded in the database. Records can be modified and also created.
 - Circulation. Accurate records are maintained on materials in the library. Materials are checked in and out to patrons and other schools in the district, placed on hold, overdues generated, and accounting records maintained.
 - Reports. There are many INFOhio customized reports that are helpful in maintaining the library, such as overdues, fines, circulation statistics, shelf lists, and lost items.
 - Inventory. This component is used for verifying the collection's contents at regular intervals, helping to keep the database accurate. Inventory is more flexible and can be done at any time during the year.
- **Curriculum Resource Catalog** - assists in collection development and identifies resources aligned to Ohio's Academic Content Standards. It is a composite of several catalogs that can be searched simultaneously. These catalogs consist of the Ohio Area Instructional Media Center holdings (registration for borrowing is required), online lesson plans, and a Union Catalog of over one million unique bibliographic records of resources held by over 2,300 Ohio public and private school libraries. These bibliographic records are used by school library media specialists to download to local online catalogs.

- ❑ **Media Resources** - makes it possible for teachers from anywhere in the state to simply point and click to locate, reserve and book the multi-media educational resources they need - 24 hours a day, seven days a week. The collections of 47 agencies are online including Area Media Centers, Special Education Regional Resources Centers, education television corporations and school district central media centers.
- ❑ **Electronic Resources** - provides a core collection of electronic, age-specific, curriculum-related resources for K-12 use in Ohio. Negotiating a statewide contract for these resources makes them available across the state without charge to individual schools. INFOhio pays **about 50¢ per student** on behalf of the State of Ohio to provide all these resources to the students and educators in every public and non-public school.
- ❑ **Instructional Development** - a full range of training, workshops, seminars, in-services, and support programs to help educators throughout the state better understand the expanding definition of literacy and how to use tools and technologies of the Information Age.

Library Automation Timeline

NOECA offers full support to its individual schools in implementing and maintaining the Sirsi K-12 software (comprehensive training for library staff, day-to-day problem solving, on-site assistance, documentation, and regular user's group meetings).

<http://www.noeca.org/INFohio/infohio.htm>

The timeline below lists the steps and sequence of activities that are necessary for converting a paper card catalog (or stand-alone system) to INFOhio's library automation system:

Activities	Months →	1	2	3	4	5	6
Contact NOECA for initial meeting		•					
Formalize agreement with NOECA		•					
Order and install equipment, if necessary		•	•	•	•		
Weed your collection; update shelflist		•					
Convert your holdings records to electronic format via Retrospective Conversion or loading records from the Curriculum Resource Catalog			•	•			
Library staff training						•	
Load electronic records at NOECA					•		
Place barcodes on materials					•		
Patron records created and loaded by NOECA						•	
Implement the new system							•
Instruct staff and students							•

Note: This timeline should be used as a general guideline. Many factors impact on this timeline, some under control of the district, and others dependent on vendors and suppliers. For example, a retrospective conversion vendor may have fewer projects at some time of the year, shortening the amount of time required for retrospective conversion.

Some activities can take place while others are in progress. However, there are also some activities that cannot begin until others are completed.

Library Automation Checklist

✓	Task	Responsibility	Coordinate with
	Subscribe to INFOhio listserv	District	
	Finalize agreement with NOECA	District	NOECA
	Determine equipment needs and placement	District	NOECA
	Determine equipment connection needs	District	NOECA
	Determine costs; submit purchase requests	District	NOECA
	Install and test equipment	District	NOECA
	Weed your collection; update shelflist	District	
	Determine conversion vendor; submit purchase order	District	NOECA
	Complete vendor's conversion checklist	District	Conversion Vendor & NOECA
	Send shelflist cards to conversion vendor	District	Conversion vendor
	Examine MARC record conversion	NOECA	District
	Load MARC records into Sirsi K-12	NOECA	District
	Test and place barcodes on items	District	
	Create and load patron record	NOECA	District
	Print patron barcodes	District	NOECA
	Implement the new system	District	NOECA
	Send authorization forms to NOECA	District	
	Begin staff training	NOECA	District
	Instruct staff and students	District	

Implementing Library Automation

Contact NOECA for initial meeting

It is important that NOECA meet with the District Librarian and your key personnel to discuss equipment needs, retrospective conversion, and the timeline of the library(ies) automation project. It is strongly suggested that your Technology Coordinator attend this initial meeting.

Prior to this initial meeting, you will need to begin thinking about how you will want your library set up in terms of search stations, student printing needs, and the circulation desk. You will also want to consider other products you will be utilizing once your library is on-line.

- *Search station (CAT/CAT JR.).* The CAT/CAT JR. Web-based card catalog will replace your paper card catalog (or stand-alone unit). You should have enough workstations to meet the needs of the students and they should be located where students can easily access them. Search stations can be any workstation that has access to the Internet.
- *Student printing needs.* You will want to decide if students will be printing their search results. Printing works in conjunction your Local Area Network.
- *Circulation desk.* There should be at least one dedicated workstation that is easily accessible and has administrative access for daily administrative tasks. A barcode scanner is required to read the barcodes for patrons and items. A printer is needed for reports.
- *Inventory.* You may want to consider a laptop and an additional barcode scanner, or an inventory scanner, for inventory purposes.
- *Other products.* Consider what resources and/or software you will be making available to your students on the workstations to ensure you have adequate hardware.

Finalize agreement with NOECA

Notify NOECA of your intent and submit a purchase order for the participation fee.

Order and install equipment; connect to NOECA

If needed, begin the wiring of your library and have equipment installed.

INFOhio Equipment Specifications:

<http://www.infohio.org/LibraryStaff/Transition/TransEquipment.html>

Weed your collection; update shelflist

Maintenance of any school library collection should be a regular, continuous process. Each school library collection should reflect:

- Changes in the student body.
- New curriculum and changes of emphasis in the ongoing curriculum.
- New issues and concerns.
- Current interests of educators and students.

When you weed a collection you will be making decisions to repair, replace, or remove items. You will want to weed your collection of seldom used and outdated materials prior to sending your records off to a vendor for conversion to MARC format. Once your collection is weeded, update your shelflist as much as possible. Shelflist cards should contain accurate information and reflect what is actually on the shelves.

It may be beneficial to record what collections your holdings will reside. For example:

FIC SUE - FICTION is the Item Group and FIC SUE is the call number

92 DRE - BIOGRAPHY is the Item Group and 92 DRE is the call number.

INFOhio Item Groups:

<http://www.noeca.org/INFohio/itemgroups.pdf>

The weeding process

1. Check the physical condition. If the decision is to replace and the item is in demand leave in circulation until the new item is ordered and delivered.
2. Check the last circulation date.
3. Check copyright or publication date. If old, examine content from a historical point of view.
4. Check for duplicates, keeping only the best copies.
5. Check for blatant stereotyping.

Decisions concerning items in the collection may be made based on the following criteria (the suggestions made are general in nature):

- Conditions which can discourage use.
 - Antiquated appearance or unattractive covers or containers.
 - Small print and faded, brittle, yellow pages.
 - Missing components, pages, or sections.
- Duplication.
 - Duplicate titles no longer of interest to students.
- Age. Materials that are dated are subject for review and removal.
 - Reference sources in geography that are over ten years old.

- Almanacs and yearbooks that have been superseded.
- Science materials in categories where facts change drastically in a five-year-period.
- Encyclopedias that have not been updated for over five years.
- Films, videos, and filmstrip kits that may be dated or biased.
- Travel books.
- Use. Materials should be examined for the amount of use they receive. If an item hasn't circulated for over five years should be considered for removal.
 - Periodicals not indexed, incomplete sets, or 15 years old.
 - Reference sources not used.
- Works that should seldom be weeded.
 - Classical literature, major award winners or of local interest.
 - Expensive books or books unique in content or format.

Each library has a unique population. It is only through regular ongoing inventory that careful and thoughtful decisions can be made and balance maintained.

Convert your holding records to electronic format

After you have weeded the library collection you are ready to begin the process of converting the holdings records to electronic format. There are several ways to have your records converted to MARC records: A vendor (such as Brodart) or the Curriculum Resource Catalog. Choose the option which best fits your budget and timeframe.

Most of the information listed here is needed with any of the conversion processes:

- ❑ Contact a conversion vendor.
 - ❑ Obtain a purchase order.
 - ❑ Form – Vendor MARC Record Specifications for Vendor
<http://www.noeca.org/INFOhio/Cataloging.htm>
 - ❑ District institution code, Location Code, and Item barcode range (NOECA).
- *Using Brodart as a conversion vendor*
 INFOhio has negotiated special prices with Brodart Library Services for conversion projects. Contact Nancy Hornberger at Brodart (800-233-8467, extension 6668). Request an INFOhio Conversion packet.

- *Other vendor for conversion*
If you are currently on an automated system (such as Follett or Winnebago) and are switching over to Sirsi K-12, contact your vendor on procedures for exporting MARC records from your current database. We will work with you to get your records converted to MARC format and loaded into the MultiLIS database. You will need to print barcodes or have them printed, and reapply barcodes to the items.
- *Retrospective conversion from the Union Catalog*
If you choose not to go with an outside vendor for your conversion process, you may use SmartPort to retrieve the bibliographic records to build your collection. You should be able to find the majority of the titles you need to build your database. However, this is the most time-consuming method of conversion.

NOECA can print the physical barcodes at cost (approx. \$.60 sheet – 30 labels).

Setting Sirsi K-12 Library Policies

NOECA staff will meet with you to discuss the policies of your library (number of check-outs, duration of check-outs, fines, etc.).

Begin training on Sirsi K-12

Once the policies have been set, and item and patron data loaded, library personnel will attend a 3-day training session in the NOECA Computer Lab. Success depends on this intense training session:

<http://www.noeca.org/INFohio/TrainingAgenda.pdf>

Library Staff should be familiar with basic computer use:

<http://www.noeca.org/INFohio/reqsir.pdf>

Each day is approximately 6 hours in length. It is recommended that all the library staff in the district be trained together.

Load electronic records at NOECA

When the retrospective conversion is received at NOECA we will begin the loading process. Please send NOECA the list of collection codes you have chosen. This information will be matched against the information found in the vendor conversion file.

After the records are loaded and reviewed, we will load any vendor disks you have for items that were ordered after the shelflist was sent to the vendor.

Place barcodes on materials.

We advise waiting until the records are loaded so that the physical barcodes can be tested for accuracy. Once this is done, you can begin to barcode your materials.

Note: Attaching barcodes to items is very time-consuming. You may want to request Assistance from school staff or volunteers.

Patron records created and loaded by NOECA

Contact NOECA when you have finished placing barcodes on your items.

Please fill out the Patron and Item Barcode Request Form for barcodes and /or additional barcodes. This form accompanies this guide or can be printed from:

<http://www.noeca.org/INFohio/barcode.pdf>

NOECA will load your student data (if you student data is housed at NOECA).

These records will be updated daily and require an authorization form:

<http://www.noeca.org/INFohio/AuthForm.pdf>

NOECA can print the physical barcodes at cost (approx. \$.60 sheet – 30 barcodes).

Implement the new system

Prior to the automated library opening to the students and staff for the first time, the following will be done:

- Check the library policies.
- Check (test) software and hardware.
- Check library staff accounts, passwords, and patron records.

At this time, you are ready to begin circulating!

Instruct educators and students to use CAT/CAT Jr.

When everything is in place it is time to begin teaching your staff and students how to search the database. You will also want to instruct them on your loan policies if they have changed due to automation.

<http://www.noeca.org/INFohio/CATolog.htm>

(Indicate groups needed)

Local Item Groups

Item Group is used to identify an object's circulation characteristics such as loan period, holds, and fines.

Standard delivered Item Groups:

Code	Prefix	Description
BIOGRAPHY		Biography Collection
<i>BOOK</i>		<i>Book - SIRSI REQUIRED DO NOT DELETE</i>
CDROM		Computer Disc Collection
COLLBIOG		Collective Biography Collection
DESK		Desk Collection
DVD		DVD Collection
EASY		Easy Collection
EQUIPMENT		Equipment
FICTION		Fiction Collection
KIT		Kit Collection
MISC		Miscellaneous Collection
MULTIMEDIA		Multimedia Collection
NONFICTION		Nonfiction Collection
OVERSIZED		Oversized Books/Tall Books
PAPERBACK		Paperback Collection
PERIODICAL		Periodical Collection
PROFESSIONAL		Professional Collection
REFERENCE		Reference Collection
STORYCOLL		Story Collection
<i>UNKNOWN</i>		<i>Unknown - SIRSI REQUIRED DO NOT DELETE</i>
VERTICAL		Vertical File
VIDEO		Videorecording Collection