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Serials Unit Annual Report 2005-2006

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SERIALS UNIT ANNUAL REPORT

2005-2006

PERSONNEL

Unfilled positions & overtime

Staffing during 2005/2006 remained level. The two Library Technician positions (Farrell and Vaudreuil) that were vacated in 2004/2005 due to retirements remain vacant. Farrell's position covered serials ordering, invoice processing, sending claims, and checkin of annuals. Vaudreuil's position covered newspaper and microfilm check-in and departmental mail.

The three full-time staff members in the unit during 2005/2006 each worked four hours a week overtime to cover the extra work, for a total of 12 hours overtime weekly. [Note that we originally started out with 10 hours overtime weekly, with the "tenth hour" rotating to whomever did the mail that week, but this proved to be inefficient.]

Thus, *in addition* to her assigned duties of checking in serials with titles beginning with titles J-Z, Paula Thompson:

- Checks in and labels annuals and hard-bound serialvolumes
- Checks in all microfilm, including deleting checkin boxes on the print record for issues that are discarded when mfilm arrives and alerting Marjorie Jackson so her students can gather the superseded print material for discard
- Runs claims using the Millennium claiming function on her titles (J-Z + annuals) and follows up on her claims using EBSCO's Interactive Claim Checker.

In addition to his assigned duties of checking in serials with titles beginning with A-I and Reference titles and assisting the Coordinator of Library Systems with computer upkeep, Michael Carpenter:

- Runs claims using the Innovative claiming function on his titles (A-I + Reference) and follows up on his claims using EBSCO's Interactive Claim Checker
- Sends claims for the entire department electronically to EBSCO, and sends additional claims by mail
- Enters check-in data for the Library's newspaper subscriptions into the system after students in Processing have processed them
- Opens and distributes unit mail

In addition to her assigned duties of coordinating all bindery activities for the Library and the University, which includes monitoring the binding budget, ordering missing issues when funds allow, and training departments on campus in using Ridley's "NetBinder" software, Pauline Contois:

- Processes the annual EBSCO invoice that is delivered via FTP
- Validates all additional serials invoices, posts them in the system, submits them to the Library Fiscal Clerk for payment, and keeps a record (in a spreadsheet) of all invoices processed
- Communicates with vendors via e-mail and telephone about invoice problems, overcharges, etc.

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- Notifies vendors other than EBSCO when subscriptions are cancelled
- Keeps track of credits and makes sure they are applied to payments
- Sends back to the publisher (or EBSCO, or USBE) duplicates, titles shipped in error, etc.

Finally, I have taken on the job of ordering any new titles through EBSCO, canceling any titles through EBSCO, creating and order records, etc.

Library Technician upgrades

In late-September/early-October 2005, Paula and Pauline, the two Library Technicians in the Unit, submitted their "Classification Questionnaires" to URI's Human Resources to initiate a "desk audit" of their positions. Both staff members, with the support of me and the Chair of Technical Services, made the case that their actual job duties were more consistent with the Classification "Information Services Technician I" than with "Library Technician."

In April, both were notified that the State Office of Personnel Administration ruled that their jobs were properly classified as Library Technician. Both women appealed the decision and were granted a hearing with Catherine Warren, Administrator of Adjudication, on June 2, 2006. After closing the hearing, Warren reopened it, and a second hearing was held on July 6, 2006. At that hearing, the Office of Personnel Administration reversed their decision and stated that both positions should be reclassified to Information Services Technician I.

This was a small but significant victory for the Library Technicians in Serials, as it validated the increasingly technical level of work they are required to perform, as well as increasing their salary by two pay grades. The compensation of the Library Technicians will now be more in line with that of the other two members of the Unit, a Systems Support Technician I and a Librarian.

We eagerly await the implementation of these upgrades, and remain determined to do whatever it takes to convince the University administration, if need be, that the technical nature of work performed by these staff members needs to be recognized.

Staff professional development

- I conducted training sessions for Serials Unit staff on "EBSCONET advanced features" and "Searching FirstSearch WorldCat."

Marjorie

- In August 2005, Marjorie attended two courses offered by the University Office of Planning Services and Professional Development and taught by Prof. Agnes Doody: "Business Writing and Grammar" and "The Image of Success."

Mike

- Mike attended a SANS seminar for URI systems personnel in April 2006. SANS conducts network security training (http://www.sans.org/).

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Paula

- Paula increased her familiarity with basic Excel by viewing an instructional videotape from the Media Research Center.

Pauline

- In August 2005, Pauline attended the course offered by the University Office of Planning Services and Professional Development, "The Image of Success," taught by Prof. Agnes Doody. She also attended a short course on Microsoft PowerPoint.

"Classified" Librarian returns full-time

Throughout 2005/2006, Marjorie was on a reduced work week of 20 hours per week. In early summer 2006, Marjorie Jackson announced her intention to return full-time beginning June 25, 2006, which she did. Given her invaluable work and the increased workload borne by the unit due to the previous year's retirements, we were more than pleased to welcome her back full-time.

UPDATED TECHNOLOGY

The year 2005/2006 brought us a few technological improvements in both equipment and software.

Equipment

Label printer for check-in of annuals. Initially, when Paula began checking in annuals, she wrote the item record number on an index card and sent the volumes to Processing to be labeled. We soon realized that workflow would be improved if Paula labeled the annuals herself while she was already in the record. This saves time, since Pauline and Marjorie do not need to look up the item again, and leaves only theft-stripping and stamping for Processing.

"Hands-free" barcode reader for Processing: Marjorie suggested that printing labels for books would take less time and be kinder to her sore wrists if she were able to use a standing barcode reader rather than one with a "trigger" that had to be pulled. Turkalo upgraded the barcode reader in Processing, which has been hailed as a big improvement.

Pauline has also started using the barcode reader to assist her in processing re-bound books that have come back from Ridley's. With re-binding, the book's barcode is destroyed and needs to be replaced. Pauline used to enter the new barcode into the system manually, which was slow and created room for error. Now she uses the barcode reader to scan the new barcode into the system.

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Software

EBSCO Claim Checker

All claims on titles that we order through EBSCO are sent to EBSCO electronically via EDI by the Millennium system. In response, EBSCO in the past produced a monthly claim checker report, which they used to mail to us. This would indicate whether the claim was filled or if the issue was no longer available, it was too late to claim, etc.

EBSCO now offers an online, interactive claims checker which eliminates waiting for the printed report and resending the claim. Mike figured out how to use this system and subsequently taught Paula. Now, each check-in technician can check the status of their claims within about a week of sending them. When the claimed issue is received, they can log into EBSCONET and remove the claim. If there has been no response, they can either re-list the claim or claim it again, noting in the OPAC that it was reclaimed online. Using the interactive claims checker has produced a much faster response to our claims and has saved staff time as well.

Millennium Binding Mode

Perhaps inspired by the Serials Unit's "long-term goal/priority" of investigating the "Innovative binding module for potential benefits to unit of using it," Pauline took the bull by the horns and figured out by herself how to use Millennium Binding Mode to help with binding tasks. Millennium will automatically check the CPR list (or any review file) and come up with a list of completed volumes that are ready to be bound. Pull slips can then be printed for students to retrieve the issues. This saves time and helps us bind volumes promptly, minimizing the number of issues that go missing.

Posting invoices in Millennium

A software update to Millennium removed the ability to post invoices or to receive the "big EBSCO invoice" using character-mode. Pauline and I figured out how to process invoices in Millennium and I wrote up a procedure, which I then forwarded to Pell and CCE.

Programming of Function Keys for Label Printing

While Marjorie had long ago programmed function keys in character-based HELIN, this year, with the help of Laury, we programmed function keys in Millennium for all serials staff logins. This allowed for the streamlining of label printing (e.g. pressing Shift + F6 types "SERIAL" and pressing Alt + F9, Alt + F10, Alt + F11, and Alt + F12 in quick succession prints the label and exits from the item record without saving changes).

"Temp Bind Slips" to Excel

When a volume is temp bound because of a missing issue or issues, Pauline keeps track of which issues are missing, in case they turn up later or she has money to purchase them. The information on missing issues used to be kept on paper slips, but with the help of her students, Pauline has been entering this data into an Excel spreadsheet. The spreadsheet

can be sorted or searched by call number or title, which makes it easier to use than the slips.

IMPROVEMENTS IN WORKFLOW

In addition to the improvements in work flow assisted by technology as discussed above, serials staff continue to innovate in order to streamline the work of the Unit, especially in the face of reduced staffing.

Mystery titles

Every week, the Unit receives a significant number of "unidentified printed objects": issues of periodicals, catalogs, annual reports, monographs, etc. These materials may be junk mail, misaddressed, mis-delivered, gifts, solicitations, etc. In some cases the item might be something we actually add to the collection, but because it arrives so irregularly, we do not recognize it. In other cases it may be a title change so different we don't recognize its former identity.

As the Unit's Librarian, Marjorie deals with these "difficult" cases, but she was finding that items sometimes came to her unnecessarily, e.g. they were in the catalog, but hard to find, or they were something that should be sent to MACC.

To prevent a duplication of effort between Paula and Mike and Marjorie, as well as to more thoroughly investigate titles that might need to be checked in after all, we developed the "Mystery Title Slip" (see attached).

The Mystery Title Slip leads check-in technicians through a set series of steps to investigate a title. At each step, they write down what they find. In some cases, they might discover the item "hidden" in the catalog under a difficult access point. In other cases, the item must be sent to Marjorie, MACC, or Bill (gift items). In this case, the recipient gets the item as well as the Mystery Slip containing bib number, OCLC number, EBSCONET number, etc. This saves time and prevents staff from duplicating each others' research.

In implementing this procedure, it should be noted that we placed our "Discard List" online (titles that we get regularly and know we should throw out) so that check-in staff can check the list quickly and easily and throw out the item themselves if it is on the list.

Also, this new procedure involves Paula and Mike working much more with EBSCONET, searching WorldCat, and decoding WorldCat records, an upgrade in the skills that are required of them.

Processing work space

- In order to better accommodate Processing operations in their new, smaller, location, Marjorie reorganized the processing / repair / temp-binding / newspaper-check-in area.

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She got rid of unnecessary tables and moved the remaining tables into a more efficient configuration.

- Marjorie also reorganized the system for shelving serial volumes destined to be temp bound and set up a new system for searching for missing issues.

Processing of monographs

- Processing of monographs backed up for a short period during the spring 2006 semester due to problems with student-worker attendance. There were a few cases in which books had been processed several days from the date they were cataloged. In response, Marjorie spot-checked carts of books arriving in Processing and found that in some instances there were up to 8 days between a book being cataloged and being delivered to Processing, which exacerbated our problems with student attendance.

  Marjorie solved the problem with a two-pronged approach. First, she hired more students and increased total student hours. This meant that even if some students were no-shows, others would be there to work. It also meant that when a large shipment of books arrived, they could be processed more quickly. When there are no books to process, Marjorie has found plenty of useful projects to keep students busy.

  Second, Marjorie coordinated with David Eiffler in MACC to deliver a cart of books every day. While this continued, it ensured that the flow of newly-cataloged monographs to Processing was steady, preventing bottlenecks. Since the daily delivery from MACC seemed to work so well, Paula now delivers any Reference annuals to Processing on a daily basis also. Unfortunately, daily deliveries from MACC have ceased, perhaps due to a bottleneck on their end. We are looking forward to the consolidation of the Technical Services staff on the second floor, as this should eliminate these "transportation problems."

  As a result, most monographs are now processed within 1 work day of arrival in the Processing area, or, at the most 2 days if a student is out sick. As per policy, Processing continues to make the processing of new books their priority, with Reference titles given the highest priority.

Book repair

- Due to space constraints, books in need of repair are now housed in a nook in the Circulation Area. More than simply saving space in Processing, this makes the books more available if a patron needs one. Now, when she has time for book repair, Marjorie goes to Circulation with a small truck and selects some books that are good candidates for being rebound and gives them to Pauline to send to Ridleys. Marjorie also selects a manageable number that are candidates for "in house" repair and brings them to Processing, where a student mends them. Then they are returned to Circulation promptly for reshelving.

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SUBSCRIPTIONS

Titles converted from print to online-only

During 2005/2006, we continued to shift subscriptions to online-only when "revenue neutral." For the 2006 subscription year, we switched our EBSCO subscriptions from the following publishers from print to online-only:

- Annual Reviews
- Wiley
- Kluwer / Plenum / Human Sciences Press / Springer
- Oxford University Press
- Cambridge University Press
- University of Chicago Press
- University of California Press
- American Society for Microbiology
- INFORMS
- Lawrence Erlbaum
- NRC Research Press
- American Institute of Physics
- Institute of Physics
- Optical Society of America
- American Society of Pharmacology and Experimental Therapeutics
- Some stragglers from Blackwell
- Miscellaneous other titles

In addition, we purchased/ converted to online-only the following large electronic journal packages:

- JSTOR (vendor HELIN)
- Journals@OVID Lippincott, Williams, and Wilkins Custom 50 package (vendor HELIN)
- ScienceDirect Freedom Collection (direct from Elsevier)
- ACM Digital Library (vendor EBSCO)
- IEE Digital Library (vendor EBSCO)
- American Society of Civil Engineers Package (vendor EBSCO)

Titles cancelled

I was also able to cancel about 75 individual titles for 2006, saving roughly $20K. These cancellations were largely made possible by:

- Titles being absorbed into packages we already had (e.g. Project Muse)
- Titles being converted to open access online with no embargo
- Devin's health sciences drop-add, instigated by the shutting down of URI's dental hygiene program

In addition, I identified a large number of microfilm subscriptions that were duplicated by online aggregator databases. We were able to cut our UMI invoice in half, saving approximately $8,000. Since microform can be purchased at any time, should an aggregator database lose

content, we can purchase the microfilm retrospectively if need be.

Titles added

We added far fewer titles than we dropped. All-in-all, we added 21 titles costing $5,600. A number of these were titles added from Devin's health sciences drop/add. In addition, past errors were corrected, for example:

- A few titles had been cancelled because they had or were going to join Project Muse, but they were dropped from Muse or never joined. They were reinstated.
- Academy of Management journals, which had been dropped in 1998 because they were full-text in ABI/INFORM were reinstated, as the current full-text is no longer available in the database.
- A handful of subscriptions had been dropped in error.
- A handful of new titles had been selected and okayed for purchase but never subscribed to.

RAMIFICATIONS OF SWITCH TO ONLINE-ONLY

Changes in workload

The most significant effects for the Unit of the continuing switch to online-only subscriptions has been a decline in both volumes bound and pieces checked in, as well as an increased workload on me in setting up and managing access to online-only titles.

Volumes bound fell from 4129 in 2004/05 to 2808 in 2005/06, a decrease of 32%.

Pieces checked in fell from an average of 1800-2000 pieces per month in 2004/2005 to 1200-1400 pieces per month by the latter half of 2005/2006, a decrease also of 32%.

Claims have also decreased, from 4949 in 2004/05 to 1429 in 2005/2006. Part of this decrease is due to fewer subscriptions, but the large number from 2004/2005 was, I believe, from the fact that at that time we were just beginning to claim electronically and had a large backlog of claims that hadn't been discovered previously. I don't have the data to back up this assertion, but my guess would be that although we now have fewer claims, our claim rate in relation to our total number of print subscriptions has increased due to greater efficiency made possible by the automated claim checker. That is, we are doing a better job of identifying late issues and claiming them.

Set up of online titles

A large part of the work of the Unit has shifted from handling printed materials to setting up and managing online subscriptions, which so far I have been doing. Access to online subscriptions needs to be activated on a publisher-by-publisher basis, which sometimes requires the review and submission of signed license agreements. Often, extensive follow-up with EBSCO and/or the publishers is required before the correct access has been granted. Then I provide proxy

information to Ruth Souto, select and sometimes customize the resource in the Serials Solutions Client Center, duplicate the Serials Solutions bibliographic record once it is in HELIN, transfer the updated order record from the print bib record to the online one, and create an item record for the online resource.

These steps are necessary in order to use the HELIN system to track our expenses for online titles and serial subscriptions in general and to keep track of how many titles we receive in different formats. While Serials Solutions does an excellent job of counting how many titles we have access to online and allows for counting only certain subsets of titles (e.g. excluding aggregators or large packages), it does not distinguish between online that comes free with a print subscription and online-only subscriptions. Thus the HELIN database is still useful for counting purposes.

Of course, changing subscriptions to online-only also creates a final burst of work for Processing and Binding. As the print issues cease to arrive, Marjorie and Pauline need to keep track of cancelled titles, close out records, send final volumes for binding, and remove shelf labels in the CPR.

Usage statistics

One benefit of online subscriptions is that usage by patrons can be tracked and the cost per use of different resources can be directly measured. During 2005/2006, Paula and Pauline began gathering usage statistics for the Library's reference database subscriptions. We now have complete sets of usage statistics for 2004/2005 and 2005/2006, which I have been posting on the Library web site to allow for cost comparisons.

A larger task than gathering usage statistics for reference databases is gathering statistics for online journals. This task is complicated and potentially very time consuming due to:

- The large number of titles we subscribe to
- The fact that one title might be available through more than one platform (e.g. Blackwell titles are available through Blackwell-Synergy and Ingenta and are also online through EBSCOhost aggregator databases)
- The fact that accessing statistics from the "166 databases" which we have selected in Serials Solutions means logging into at least 50 different administrative modules to gather statistics.

Because of these complications, we have not yet systematically started gathering usage statistics for online journals. There are a couple of alternatives, however, that might make the job easier:

- We could gather the statistics only from the Serials Solutions Client Center. While this would not be 100% accurate, because it would not count patron access that bypassed Serials Solutions by navigating directly to the vendor, it might give us valid numbers for comparison, e.g. "among Oxford Journals, which are the most/least used", or "among online journals in music, which are used most." Still, gathering even these statistics is no small task.

- We could wait for a number of initiatives currently in development to mature. For

example, there is SUSHI, the "Standardized Usage Statistics Harvesting Initiative" (see http://www.niso.org/committees/SUSHI/SUSHI_comm.html), which would essentially automate the gathering of usage stats by designing "an automated request and response protocol based on a web services model for downloading XML versions of the data into an electronic repository." In my understanding, SUSHI is designed to work with Electronic Resource Management (ERM) systems such as that under development by Serials Solutions (ERMS and "Counter Counter") and available through Innovative Interfaces.

It should be noted that gathering these statistics required Paula and Pauline to learn several different interfaces for database administrative modules, as well as to use Excel to enter manipulate data.

More attention to problem solving

Having to check in and bind fewer titles means that more attention can be devoted to the titles we do work with. Serials staff now spend more time cleaning up problems, running to the stacks to check to see what is there, etc. We also spend more time on claims and making sure we get what we paid for.

DATABASE MAINTANANCE

As Unit Head, I spend a good deal of my time maintaining and improving the serials records in the HELIN catalog. During 2005/2006, I worked on a number of database maintenance projects:

Missing issues

The HELIN Serials Committee in Spring 2006 decided to give up hope that Innovative would create an enhancement that would allow the "m" missing issue field to display on the holdings record in the WebPAC, instead of on the checkin card page. Not only is the checkin card page one more "click" for patrons, but when a record is closed out, the "missing" field is no longer visible in patron mode.

Instead, the Serials Committee voted to adopt the practice of most other Innovative libraries: to put missing issues in a second "h" LIB HAS field, preceding by the word MISSING.

I created a list of URI (including CCE and PELL) serial records with missing issues, and HELIN Knowledge Management Librarian Martha Sanders copied the missing issues information into the second holdings field, inserted the word MISSING in front of them, and then deleted all the "m" fields, which we will no longer use. Missing issues are now readily visible to patrons and Public Service staff.

Order and Checkin record coding

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My predecessor Martha Kellogg employed a number of codes in order and checkin records for sorting purposes. By the time I assumed the duties of Serials Librarian, the codes had been unevenly applied and no one remembered exactly how they were used, so I cleared them all. During the past year, I began to think of useful ways of coding records. I developed a system of coding (see attached summary) and am in the process of implementing it.

In short, I am indicating on order and checkin records whether a title is print only, online only, or print + free online. On checkin records, I am coding combinations, memberships, exchanges, gifts, and GPO titles, as well as whether a title should be theft-stripped.
On order records I am coding whether a title is part of a combination or membership and if it is a "bill-later". This is a work in progress.

Checkin, Order, and Item record defaults & prompts
During the past year, I worked with HELIN Systems Librarian Ruth Souto to update the default data and prompts for serials checkin, order, and item records. Specifically, new templates were made for:

Checkin records:
- URI Online Serials
- URI CPR Serials
- URI Serial Stacks Serial

Order records:
- URI Print Serials
- URI Online Serials

Item records:
- URI Online Serial
- URI Print Serials

Continuous updating of records
Throughout the year, I continuously update checkin, item, order, and bib records.

Besides adding coding and making changes made when a title moves to online only (both discussed above), it often happens that a checkin record has not been touched in some time, even though it is still active. The most important field to check and update is the subscription number, so that missing issues can be claimed electronically. Over time, many of our EBSCO subscription numbers have changed as titles were converted from print only to print + free online.

When I am in a checkin record, I also convert the call number to MARC (090) format, remove old binding history notes, subscription numbers for cancelled titles, and other old notes that are no longer relevant. If there is an internal note that alerts the checkin technician that something needs to be done (e.g. send to MACC to catalog as monograph, theft-strip, etc.), I change the "z"

internal note to an "a" note, which creates a pop-up window when staff enter the checkin card. This way any special procedures cannot easily be overlooked. For subscriptions that were changed to online-only some years ago, I note the year of conversion with an internal note.

I update order records with the correct EBSCO subscription number, the format (print only, only only, or print + free online), and subscriber number, when available. When I see a faxon number or SEE SERIALS LIST note in a bib record, I delete it. I have also been implementing our new ICODE2 codes for print serials, online serials, databases, etc. in item records.

Other database maintenance projects during the past year included:

- Creating a list of gift subscriptions and closing out the records of any that were inactive.
- Creating a list of URI serial records with PCOUNT=8224 (which means that the number of checkins counted has been maxed out), changing the preference to "do not count," and re-setting the number to "0". This helps prevent the corruption of our monthly "pieces checked in" statistic.

Continuous updating of Serials Solutions client center

The amount of change in online journal access points, years covered, etc. cannot be understated. On almost a daily basis I make additions and corrections to our online access in the Serials Solutions Client Center. I also familiarize myself with new Serials Solutions features as they are released; I update settings; and I set up databases to work with Article Linker. On a monthly basis, I remove URI's holdings from the bib records of Serials Solutions MARC record "deletes" and send this list to LIBNEWS.

OTHER ACCOMPLISHMENTS

Historical cancellations on Web

Over the past year, I created a number of Web pages on the Library site that detail historical serials cancellations undertaken by the Library. See http://www.uri.edu/library/serials/serials_cuts/serialscuts.html. For each cancellation, titles and total dollar amount cancelled are given. I believe that this is useful historical information that should be publicly available.

JSTOR Microfilm discard

I added an internal note to the checkin records of all print and mform periodicals in our collection that are in JSTOR. This enabled me to create a list of microform holdings that were duplicated by JSTOR. I withdrew these microforms from the collection, thus cleaning up our serials holdings, freeing space in the mform cabinets, and freeing patrons from any unnecessary microform use.

I also produced a list of URI print holdings (non-current) duplicated by JSTOR and passed that list on to the Head of Access Services, in case it would be helpful to move some of these titles to

the Mezzanine to make space on the Lower Level.

FUTURE PLANS

The major project I plan to undertake in the coming year is an inventory of missing issues:

Missing issues inventory
Much of the Library's information on missing issues is incomplete, because the old Serials List only indicated that a volume was missing an issue, not which issue that was. When the Serials List information was entered into the OPAC, it was entered "as is," with the ambiguity remaining as to which issues were missing.

Now that missing issue information is so prominently displayed, we will be doing a great service to our users by letting them know exactly which issues are not in our collection.

Thus, during the next year, I plan on having checkin staff spend one hour per day each conducting a missing issue inventory. This should not be a problem time-wise because the number of items that we check in continues to decline.

I have already created a list of checkin records with holdings statements containing the word MISSING and signs of ambiguity such as "?", "<", and ">". I will sort this list by location and title and ask Mike to begin to inventory missing issues of titles beginning with A-I plus Reference titles and Paula to inventory missing issues of title beginning with J-Z plus annuals.

Also, If time allows, I would also like to take initial steps toward collecting usage statistics for journals:

Usage statistics for journals
I would like to experiment with gathering usage statistics for online journals (either directly from publisher in the case of publishers from whom we get many titles, e.g. ScienceDirect, Blackwell, Springer) or by using the Serials Solutions "click-through" data.

Finally, if time allows, I would also like to offer more training sessions for Serials staff:

Staff training
In order to upgrade Serials Unit staff skills in general and to help them better understand the work of the Unit and the Library as a whole, it is my intention to conduct training sessions in the areas listed below. I have held off on some of these thus far due to time constraints and the hope that the Farrell position will be filled and current staff could be trained along with a new staff member.

- Using and understanding the Serials Solutions A-Z List.
- A tour of the Serials Solutions client center and what I do in there.

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- A detailed look at HELIN record types (bib, item, order, checkin) — what each data field means and how we use it.
- Creating lists in Millennium.
- Basic Excel for keeping usage statistics.

Along the same lines, I will continue to update the Serials Unit procedures manual.