

Annual Report FY2006-2007: Technical Services

Technical Services staff:

- **Departmental changes: personnel and work responsibilities**
 - Jane Ting retired after many years of extraordinary service;
 - Nancy Pelis took over all aspects of continuations, including order management. She also saw the number of standing orders for which she is responsible grow considerably as we sourced them to YBP whenever possible.
 - Everyone in Technical Services managed to survive our ALEPH migration with a modicum of sanity remaining. Recognition of this fact—and of all the work, creativity, perseverance, and good humor this process required of us— is arguably the most important fact contained in this FY2007 annual report.
- **Departmental professional development and training:**
 - Attended:
 - ELUNA 2006 (Knoxville, TN) & ELUNA 2007 (Spearfish, SD)
 - ALEPH cataloging, serials and acquisitions focused training (Chicago, IL)
 - ALEPH module-specific training by ExLibris
 - Various in-house and Five College ALEPH training events
 - NELINET training sessions on LC Classification (2 days)
 - Several ExLibris web-based training sessions (MARCit, Verde)
 - Bystander Training (Center for Gender in Organizations)
 - Web-based workshop on the “redesigned GOBI” (YBP)
 - SOLINET workshop on redesigning work in libraries (@Amherst College)
 - Provided/presented:
 - Shadowing opportunities for Simmons GSLIS students in Technical Services class
 - ALEPH training for cataloging and other modules as required
 - Specific ALEPH training sessions as required, e.g. creating brief records in ALEPH for reserves and the LRC
 - Training/mentoring for Archives to encode and enter records for archival collections into OCLC/ALEPH
 - Panel at ELUNA 2006 on Verde implementation
 - Committee/task force service:
 - ALEPH Implementation/Management Committee
 - VERDE Implementation Committee (Chair)
 - Task force on Depository staffing recommendation
 - Five Colleges Acquisitions and Serials Committee
 - Five Colleges Cataloging Committee

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II ALEPH conversion:

The most important single event that occurred in Technical Services over the course of fiscal year 2007 was our conversion to ALEPH on 28 August 2006. At this writing, we are still dealing with the after shocks of this process.

One result worthy of mention in this context is that currently we lack access to reliable data with which to create a viable annual report. Data for the first 3 months of this fiscal year died with the Ill server; historical data migrated to ALEPH as static and non-reportable. Add to this the fact that retrieving standard statistical reports from ALEPH is not possible to any significant degree. In November of 2007 the ALEPH Reporting Center (ARC) will be installed, leading me to believe that for FY2008 I may have reliable statistical analysis of Technical Services functions. Check back next year to see if my hopes have been realized.

As you might imagine, the past year in Technical Services has been spent reinventing all acquisitions, cataloging, serials and bindery processes. I have documented all new processes and posted those procedures in the Technical Services Ella site.

III Acquisitions highlights:

- Worked with Collection Development to implement a pilot program for purchasing proscribed ILL request materials (subsequently became policy)
- Continued re-vending Continuations to YBP where possible, thus avoiding serials jobber service charges and acquiring 6-17% discount
- Consolidated majority of monographic purchasing with YBP, justifying extended discount negotiated the previous year
- Created SQL+ query to sum invoices by external funds for Accounts Payable processing (a report currently unavailable in ALEPH, but required for invoice payment)
- Implemented new processes and procedures for credit card transactions recorded in ALEPH
- Reconciled ILS and MHC transactions (an MHC first)
- Recognized fact that the leisure rental collections failed due to internal mismanagement (discontinued plans in FY2008)

IV Serials and periodicals highlights:

- Provided support for periodicals review
- Arranged local purchase of common daily newspapers, thus ensuring timely receipt of issues
- Implemented ALEPH EDI invoicing for EBSCO annual billing
- Reviewed "bill-later" titles sourced to Harrassowitz and EBSCO for potential re-vend to YBP at maximum discount
- Created and/or edited publication patterns and holdings statements for all active serials subscriptions (after ALEPH migration)