

# Serials Automation - Our Experience

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In order to understand the decision to automate our serials control it is necessary to give some background. This may give the impression that our previous method was chaotic. This is not entirely fair, as for many years the system worked well.

The increased demand for statistics was one of the major factors. The desire of library staff to have more time to disseminate information rather than just record it was another.

Our library is small but busy; we have two members of staff responsible for serials control.

This was so in 1981. We were subscribing to 350 titles, all being circulated and all needing to be on someone's desk within hours of publication.

Our method of control was a series of record cards. The serials card was filed alphabetically under title and attached to it was a circulation list. The reader card was just that, filed under name not department. As every serials librarian will know, readers have a habit of changing departments, changing jobs and generally just changing their minds. The result was a slightly battered set of records. We were always promising ourselves time to rewrite and tidy them up but it never materialised.

Providing statistics was tedious. It was perfectly feasible to provide a department with a list of titles circulated to them. It was also possible to give managers costs for budget control but it was all extremely time-consuming.

It is our practice before renewing any subscription to approach everyone on the circulation list and ask them to evaluate the title. This was possible using the cards but again was time-consuming.

Claiming was one of our biggest headaches. Why do things go out of print so quickly? We used a multitude of coloured tape slotted into the cards to alert us to problems. The result was pretty but not very effective.

Marking up issues for circulation was by trial and error. The easiest way was to write straight on to

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the cover page (why are the majority of cover pages black and shiny?). The mail room did not appreciate having to turn the serial round several times before deciphering who it was meant to be going to. So issues left us, some with labels, some without. Not at all a desirable situation.

In 1981 our Computing Department devised a loans and recall system for the library. This worked so well that we began looking for ways of automating serials. It was around this time that we heard that Blackwell's were developing a book and serials package so we contacted them. The system was in an early stage of development. This was good, it meant they were keen to have input and open to ideas. After much discussion with them and a lot of justification to increase our budget we decided to purchase. What subsequently happened was an introduction to a whole new vocabulary and many unforgettable experiences.

Having decided to go ahead with the system our first problem was where to install it. From early days we decided that all we needed to know was how to work the system, not how it worked. We were determined to leave the technical detail to experts.

The impressive list of equipment required was purchased. It was obvious this could not be housed in the library so a small office just off the main reading area was dedicated to PEARL. We watched with interest as the LSI 11/23 Computer plus 2 LA50 Printers were put into place.

The VDU and keyboard were ready on the desk, and the modem phone installed.

We were impatient for the technical experts to leave. Our first task was to input our data (note the change in terminology). After all, we were not without experience, we were familiar with on-line searching and our loans systems was computerised.

PEARL was installed in November 1982. Our aim was to be up and running by January 2nd 1983. We were advised by Blackwell's that in order to set everything up accurately we should allow three months.

Thanks to one very active member of staff we achieved this in six weeks. At the end of the six

weeks he was exhausted and those of us watching were too.

The first snag in setting up PEARL was that stage one involved the inclusion of an ISSN number. Without it one was lost. The answer to those publishers who do not see the need for one was for us to make one up. This was fine if whoever was doing the input remembered to write it down somewhere. In our case this did not always happen.

As the next stage involved entering in a publisher it soon became obvious that the only way to have accurate detail was to sit with an issue of the serial in front of you. The chaos in that office was unbelievable. The member of staff involved with input decided he did not have time to do that, and put everything away afterwards.

The readers file came next; not difficult, just a question of finding the most up to date information on departments.

Have you ever argued over correct titles? We did. Have you ever argued over method of entry, for example volume and numbers as opposed to date? We have. There are several serials which shall remain unnamed that make it virtually impossible to standardise. We even argued over frequency. The only saving factor was that the office was away from the main library.

After the frantic six weeks and a Christmas holiday we were ready to go for it. I think it is at this point that I should mention the Help Desk at Blackwell's. They were superb, extremely patient and tolerant and very good at deciphering garbled descriptions about what had gone wrong.

Day one of operation was a definite milestone. Having entered the first receipt we could not believe it had worked, so we spent a lot of time rechecking everything. Not at all necessary.

The labels produced were "real neat": so good that readers were ringing us up to ask what had happened.

We enjoyed the facility. Our vocabulary increased tremendously. Weeding took on a whole new meaning. End of Day was not the time to go home, in fact there were three hours between End of Day and leaving the library. We talked authoritatively about systems parameters and were totally *au fait* with De-Spoolers.

My colleague Jay Cutts became the systems expert. She demonstrated to others and we were fine unless asked about Fund Accounting.

Strange things began to happen on our modem phone. Somehow because it was not used that often it had been relegated to the floor under the desk. It began to ring frequently. It is not dignified to answer a phone sitting on the floor under the desk but was at that time the only way to reach it. All calls were for Buckinghamshire Social Services and some of the questions were extremely probing. I must admit we were tempted to answer some but decided we might set people on the wrong path so admitted who we were.

We did try to sort out our own problems before calling the Help Desk. After all we attended all the training sessions and should have been able to do so. PEARL version 1 came complete with manuals - 3 volumes all cross-referenced (by the time version 4 came this had been much improved to only one volume).

I have vivid recollections of one afternoon when we had a problem which we decided to sort out ourselves. Three members of staff each took a volume of the manual and we gathered in front of the screen. Two hours later, we and the Help Desk were still there. The manuals weren't.

Four years later we decided we had to change systems. Our reasons were simple and known in detail to the people concerned. We should explain briefly what must appear to be a puzzling situation: our company was moving more and more to IBM PC's. We had to give up the office space and we were not using PEARL 4 to its fullest capacity. We would have needed more training and did not have the time.

At the On-Line conference in November 1985 we were given a demonstration of the Dawson SMS system run on an IBM PC; we were impressed with its simplicity.

We purchased a demo diskette. Nothing can go wrong with that? It can and did when it self destructed. A replacement was despatched.

We ran the demo and liked what we saw. We already had the IBM PC XT installed in the Library. All that was needed was compatible printers. We decided to purchase and the system was installed in January 1987.

It took three days to input 420 titles. ISSN are not needed nor is it necessary to state publishers. Frequency is important, so is predicted receipt. That was the most difficult area to cover. The claims feature depends on the predicted arrival time.

It is not my intention to make this a comparative study of all available automated systems available.

I will try however to sum up the benefits as we have found them.

We still have two staff involved in Serials control. Although the number of titles has increased we find we have time available to allow involvement in many other areas of library work. This was one of the major factors considered in 1981.

Producing statistics is now easy and immediate. The Reader file contains all information needed on departments, and the serials taken by them. The preparation of the lists of titles under

consideration for renewal now takes a couple of hours.

Circulation labels are clearly printed and firmly fixed. This makes us much more popular with the mail room.

We miss the coloured tape previously used to alert us to problems, but I must say the claiming function works well.

With automation we are able to offer service faster and more efficiently.

WHY AUTOMATE? WHY NOT?

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