Mobile Worklists Simplifies and Speeds Up Collection Overhaul at UC Hastings Law Library

Librarians at the Law Library at the University of California Hastings College of the Law (UC Hastings Law Library) faced a huge upcoming weeding and relocation project; they knew that creating and accessing item lists on a mobile device using Sierra Mobile Worklists would increase efficiency and simplify the largely manual process. The Library became a beta partner and early adopter of Mobile Worklists and has benefitted from early access to the product while contributing experience-based suggestions for updates and improvements.

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– Elizabeth Henry, Product Manager, Innovative

CHALLENGE: A NEED TO WEED

UC Hastings Law Library is known for its extensive collection of print resources, government documents, archives, and electronic materials, housed on three floors of a six-story academic building. The library’s holdings, managed using Innovative’s Sierra Library Services Platform, include federal, international, and California documents. While the collection is sizable, space in the library is at a premium, and print resources were housed in areas needed for classrooms, common areas, and study rooms for student and faculty use.

In the summer of 2014, the College determined that the top floor of the library would be repurposed for new classrooms, an Educational Technology Center, and space for research centers and clinics. It was quickly calculated that about 40% of the library’s print resources would need to be withdrawn, transferred, or moved to a designated storage area.

Stephanie Schmitt, Assistant Technical Services and Systems Librarian, says, “At the Innovative Users Group Annual Conference in April 2014, we heard about a great new product in development, Mobile Worklists, and we just knew it would be a perfect fit for our project.”

Library staff contacted Elizabeth Henry, Innovative Product Manager for Sierra Mobile Worklists, and asked to be one of the first users of the product. Elizabeth happily signed up the UC Hastings Law Library as beta testers, “The UC Hastings Law Library was an ideal candidate for Mobile Worklists because they had this big project with very specific goals that was prime for mobile intervention – we all recognized this right off the bat,” Elizabeth says. “Their project validated that Mobile Worklists would be successful across high-volume deadline-driven projects, while our other beta partners were proving success with standard operational workflows in all sizes and types of libraries.”

“Our goal was to maintain the integrity of the collection and to ensure that faculty and students retained access to the content they need,” says Provost and Interim Director of the Law Library, Elizabeth Hillman.
As one of the project’s leads, Stephanie facilitated faculty involvement in the collection analysis. An ad hoc committee of faculty and librarians was formed, and workflows to assist with collection review were established.

**THE PRE-MOBILE PROCESS**

Mobile Worklists was not yet ready when the project began, but “we planned for a year-long project,” says Stephanie. Each month, they generated lists from Sierra of physical items, and librarians reviewed the lists for items to discard, which included items with an electronic counterpart or duplicate or multiple copies. Throughout the process, the librarians and faculty on the collection development committee ensured that curriculum needs would continue to be met with the remaining resources. The bibliographic and item records for the selected titles were updated manually to reflect their new withdrawal status in Sierra.

Next, library staff worked to pull the items that were marked for removal from the collection. Before Mobile Worklists, they used printed lists and moved the items into a staging area. The entirety of the remaining collections would be moved to one of the remaining two floors. Each record would need updated location codes. About halfway through the process, the library staff received the anxiously-awaited news that Mobile Worklists was ready for beta testing.

**THE MOBILE SOLUTION**

With Mobile Worklists, the library staff no longer needed to manually update the records for withdrawn items. Staff could now move quickly through the stacks to identify materials selected for withdrawal using the Mobile Worklists app.

The real savings was seen in time and manual effort, especially when it came to emptying the top floor. With Mobile Worklists, barcodes of pulled items were scanned into a new list showing items that had been pulled and moved. Items in the staging area were quickly scanned and moved on as well. The lists generated on the devices could be immediately loaded into a review file in Sierra, where the Global Update tool would annotate the record with the final details of the withdrawal status and location.

Stephanie reports that “staff was pleased with the speed, accuracy, and efficiency of Mobile Worklists.” Eliminating the extra steps of printing lists, moving stacks of books, and relying on marked-up printouts to update item records in the database saved them enough time that they were able to finalize the project before their deadline.

**RESULT: A MOBILE FUTURE**

The UC Hastings Law Library was able to meet the needs of the College and have the new library configuration completed by the start of the 2015-2016 academic year, thanks to the speed and efficiency of Mobile Worklists. The results will be felt by everyone on campus. Elizabeth explains, “More study rooms and the new College resources will help draw patrons to the library building and will contribute to the concept of the library as a central place for our students and faculty.”

Meanwhile, library staff in Technical Services and Public Services continues to use Mobile Worklists, now out of beta and in general release, as a relevant part of ongoing operations. For example, the team has already completed a project to move materials from permanent storage back into the stacks. Mobile Worklists allowed them to make those location code changes quickly and easily.

**ABOUT MOBILE WORKLISTS**

Sierra Mobile Worklists is a native iOS app that is fully cloud-based and integrated with the Sierra desktop application. Traditional library tasks such as inventory management, weeding, relocation projects, and list generation are simplified, and paper reports are rendered unnecessary, thanks to the app’s intuitive and easy-to-use interface that can be utilized right in the library stacks.