

Caia Software and Solutions: Workflow Planning

Receiving

- How are materials to be received (book trucks, cartons, palletised, etc.)?
- Separated by Collection? Pre- or post-delivery?
- How frequently delivered?

Pre-Accession Processing

- Vacuum
- Duplicate Barcoding
- Size/Containerise
 - How many sizing templates?
 - Steel rulers for processing stations/shelf audits?
 - Measuring tapes for tray interiors?

Route for Accession

- Booktrucks? Are they through-process or job-specific?
- Linear vs. Batch processing?
- Job tracking/support forms

Background tasks

- Generating tray labels
- Assembling trays
- Labelling/Addressing Shelves

Considerations

Projected daily rate of accession: how many items to be accessioned (Job complete; Item Status “IN”) per day, by how many staff with how many workstations? System access is limited only by the number of workstations, etc. available. How will work be divided amongst staff? Requisite training for OSHA heavy lifting compliance? Training for use of the order picker/ladder? Will student staff play a role?

How soon after accession production launches will circulation services begin? Are they scheduled or on demand? Will circulation services impact accession production or pre-accession processes? Overall, how is the production workflow scheduled for the course of a full service day?

Address ID labels, both barcode identifiers (6-digit, Code 39, no check digit) and human-readable addresses, need to be designed, proofed and printed in time for the completion of shelf installation. The barcode ID labels themselves are random numbers and have no geographic data associated with them until it is assigned in the Add Address function in CaiaSoft®. We do not suggest embedding a geographic location in the Address ID label because, if the shelf’s location is hardcoded in its barcode, that space is now locked. If a shelf reset were required, either adding or removing shelves, the entire ladder would have to be relabelled to reflect the new sequence. If not, the “address value” of the ID for a shelf located at Aisle 1 Left, Ladder 2, Shelf 11 – represented on the human readable label as 1L–

2-11 – becomes nothing more than a serial number - 1L0211 – negating the original purpose of the pre-addressed label. The sequence of shelf barcode IDs then becomes another element to manage. In short, the effort required to maintain sequential Address ID labels is not worth any potential benefit they may have.

In addition to the sizing template and measuring tapes for trays/shelves, Caia proposes this list of recommended tools/helps for the facility manager:

- Rubber mallet
- Spirit level
- Knee pads
- Anti-static dust sheets/dust mop with extendable handle
- Duct tape and masking tape
- Box cutters
- Basic tool kit, including hammer, Philips and flat head screwdrivers, adjustable wrench, slip-joint pliers, needle-nose pliers with wire cutter and a socket-wrench set
- Flashlight
- Microfibre towels
- Coloured dot stickers
- Clipboards
- Clear plastic page sleeves
- Date stamps
- Pencils
- Stapler, staples, and remover
- 18" steel rulers or similar thin steel strips
- Scissors
- Fingerless gloves, for prolonged work in the storage chamber
- Work gloves for unloading trucks, setting shelves, handling pallets, &c.

Other facilities may have their own tips, tricks and helps: please access the CaiaSoft® User Group to ask your library storage colleagues for their recommendations and suggestions.