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Tech Services Workflows: trends and good practices

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Agenda



- Trends
- OCLC services
 - WorldCat Cataloging Partners
 - WorldCat Collection Sets
 - Bibliographic Record Notification Service

- Streamline technical services to focus on hidden collections
- Merge acquisitions and cataloging departments
- Receive vendor records
- Implement shelf-ready for print materials
- Define “good enough” bibliographic records
- Evaluate patron driven acquisitions

UC Next Generation Technical Services report



- Implement a “good enough” record standard for all of UC
- No local customization of records

- ALCTS CSS Copy Cataloging Interest Group
- Checklist for acquisitions staff to complete physical check of books and processing
- Categories:
 - Need additional cataloging
 - Need additional physical processing
 - Bypass cataloging and processing (45%)

- Role of Professional Librarian in Technical Services Interest Group
- Mass management of E-book catalog records (LRTS, 54 (3), July 2010)

Online Catalogs: What Users and Librarians Want



End-Users expect online catalogs:

- to look/ behave like popular Web sites
- to have summaries, abstracts, tables of contents
- to link directly to needed information

Librarians expect online catalogs:

- to help staff carry out work responsibilities
- to have accurate, structured data
- to exhibit library principles of organization

Online Catalogs: What Users and Librarians Want



An OCLC Report

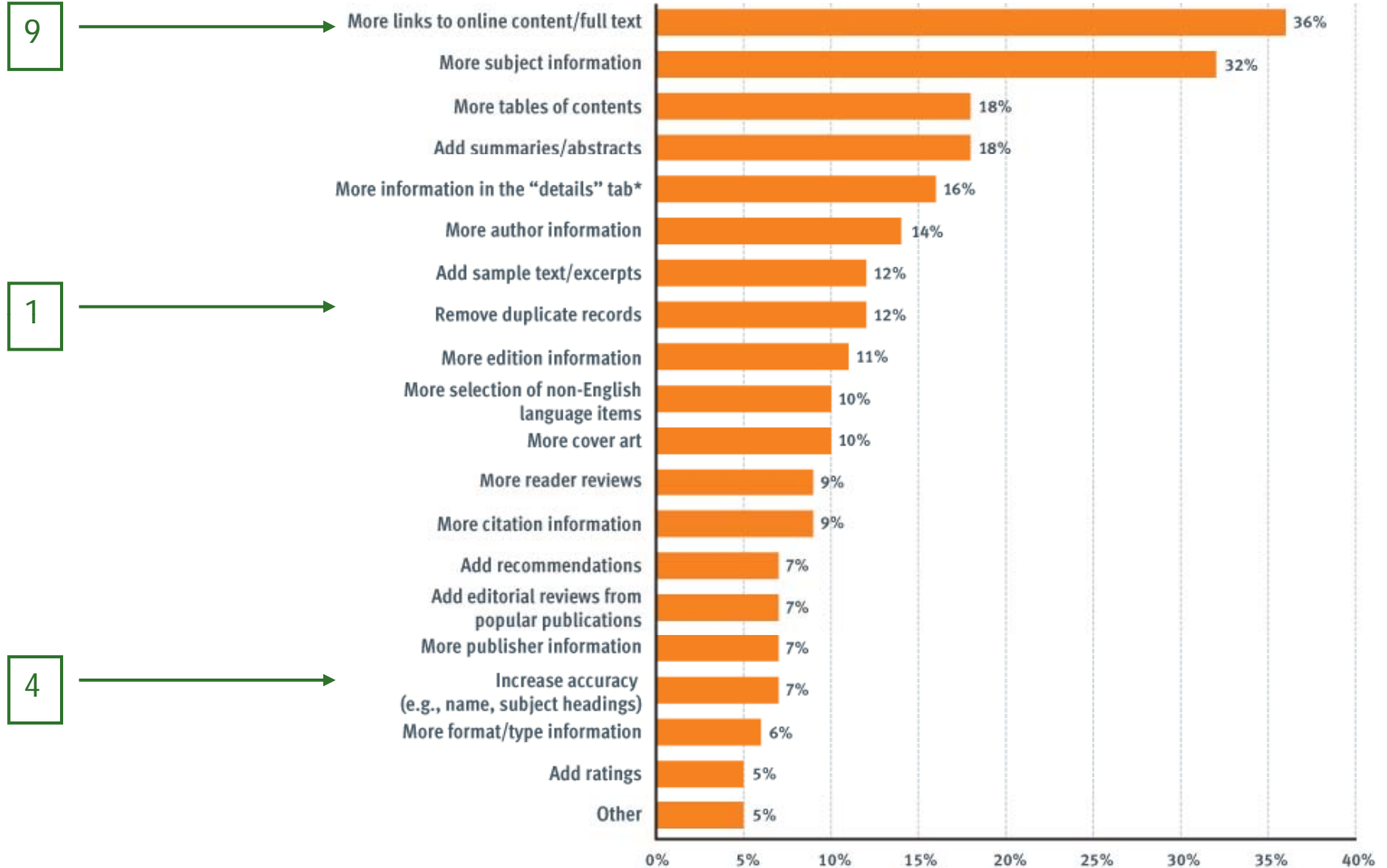
April 2009



<http://www.oclc.org/us/en/reports/onlinecatalogs/default.htm>

Librarian/Staff Results: Highlighted Differences

End-User Results: Recommended Enhancements





Quilts 001 by Lansing Public Library, Lansing Illinois

<http://www.flickr.com/photos/lansinglibrary/456681271/>



Warm! by malamantra

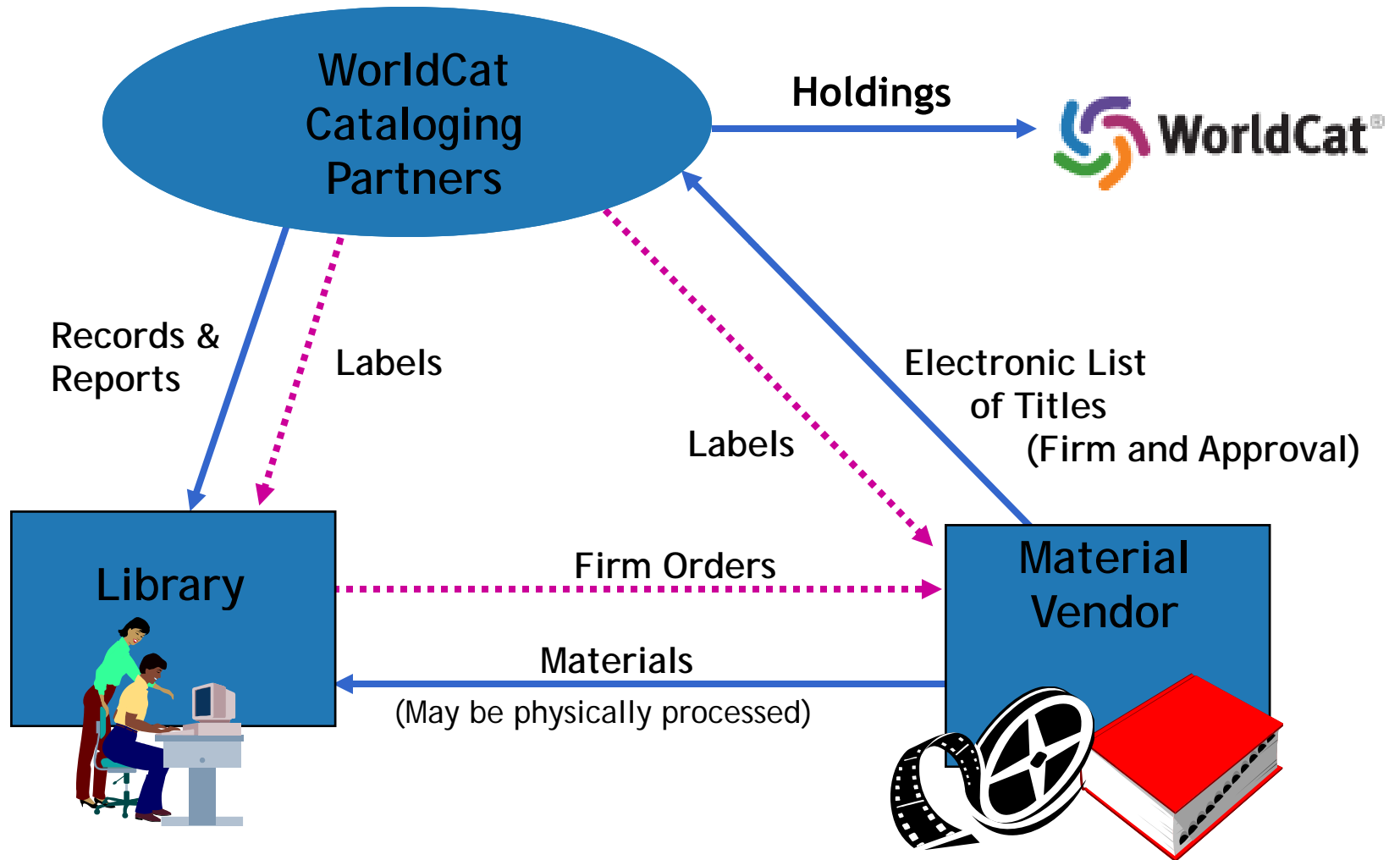
<http://www.flickr.com/photos/meghanandnick/2141323599/>

Three OCLC services



- WorldCat Cataloging Partners
- WorldCat Collection Sets
- Bibliographic Record Notification service

WorldCat Cataloging Partners



WorldCat Cataloging Partners vendors



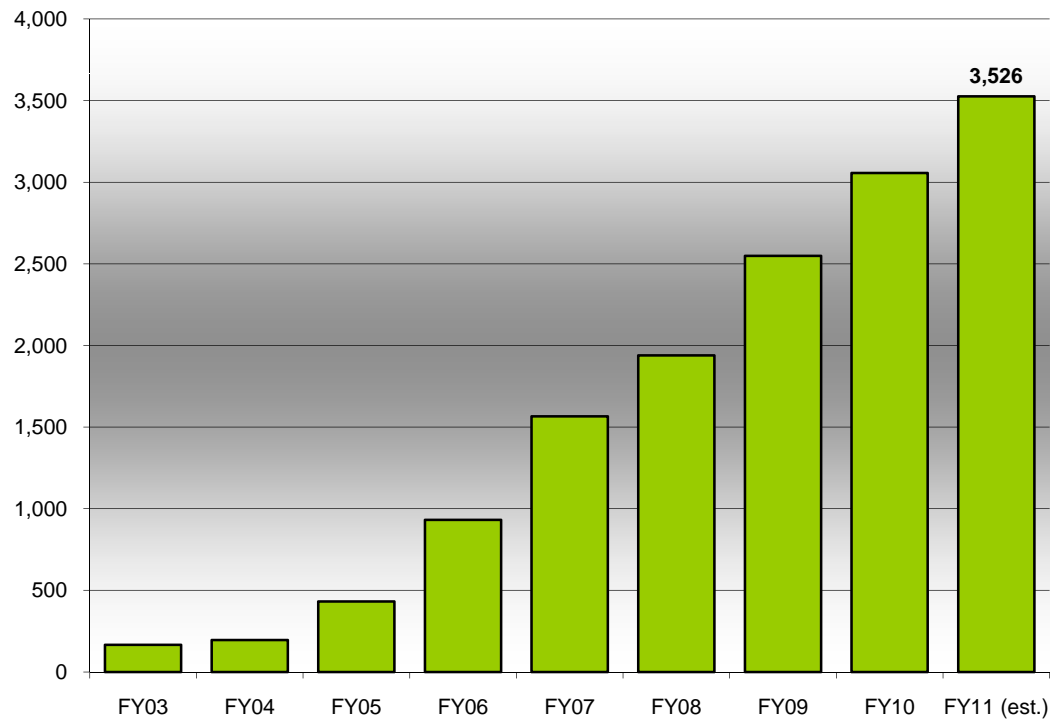
- Over 50 vendor partners
 - Baker & Taylor, Inc.
 - Casalini Libri
 - Coutts Library Services
 - Follett Library Resources
 - Harrassowitz
 - Ingram Library Services
 - Midwest Library Services
 - YBP Library Services

http://www.oclc.org/catalogingpartners/wccp_partners.htm

WCP Growth



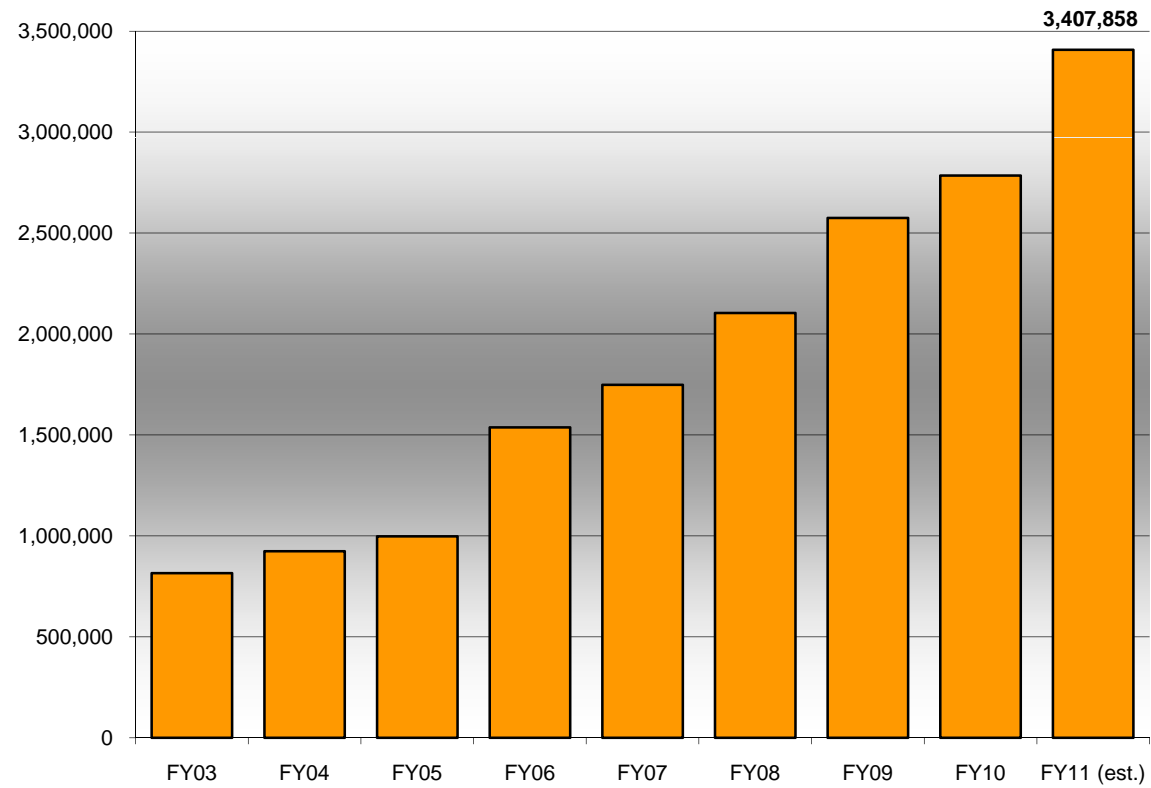
of Libraries using WCP (at year end)



WCP Growth



of Records Delivered through WCP



- Record Selection
 - Encoding level (All, CIP, Full, Not Full, Other)
 - Cataloging source (All, LC, NLM, British Library)
- Record Delivery
 - EDX (FTP), Product Services Web
 - Separate files for firm vs. approval
 - Separate files for each account number

- Constant Data
 - For example, add note “WCP” to every record
- Copy Call Number
 - To other call number field
 - To local field
- Partnering Data Record (PDRs)

- Set Holdings
 - Immediate or Delayed 1-180 days
- Labels - to you or your vendor
- Vendor-supplied Data
 - Purchase order number, invoice date, barcode, price, etc.

WorldCat Cataloging Partners benefits



- Get materials to users faster with effective, automated delivery of OCLC-MARC records
- Improve cataloging efficiency by reducing the time your staff spends editing records, handling titles and searching for records on multiple systems
- Reduce training demands—once WorldCat Cataloging Partners is incorporated into your processes, little additional training is required
- Save staff time and contribute to WorldCat by having your holdings information set automatically

WorldCat Cataloging Partners setup



Vendor needs to:

- Communicate account number to library for profiling
- Set up their systems to send manifests once profile is active

Technical Services librarian needs to:

- Implement procedures to use Cataloging Report and to include records in workflow
- May include quality check on records
- May include physical processing

Systems librarian needs to:

- Work with Technical Services librarian to ensure that local system load tables will load records
- May need to provide details about what is required for local fields (usually 9XX fields)
- Set up procedures to pick up and load records

WorldCat Collection Sets



- Save staff time and expense of cataloging hundreds or thousands of titles
- MARC records for vendor sets of microform and electronic collections ready to load
- Holdings automatically set in WorldCat



- Over 300 collections available, some at no charge:
 - Elsevier
 - John Wiley
 - Springer
 - Knovel

<http://www.oclc.org/worldcatsets/sets/default.htm>

SPRINGER COMPUTER SCIENCE - 2011 2/3/11 - (075)

Subset Information

Set Name / Symbol

SPRINGER COMPUTER SCIENCE - (SPRCS)

Subset Name / Symbol

SPRINGER COMPUTER SCIENCE - 2011 2/3/11 - (075)

Physical Format

Electronic

Domain URL

<http://dx.doi.org/10.1007/>

Published by

Springer

Cataloging Information

Cataloged by

OCLC

Cataloging status

Ongoing

Number of titles

15 Records

Formats represented

Books: 15

Subject headings

100% subject analysis using LC subject headings

Level of cataloging

100% of the cataloging is level I

Sample Records

- **697506445**
-

Additional Information

This set is being subsidized by the vendor; no record delivery cost will be incurred by the library. Users may request that a call number be added to the records. However, custom call numbers (pulling numbering from the 533 or 830 field in microform records) are not available for electronic sets.

- Record editing
 - Replace 856 fields (Electronic Location and Access) with a single 856 field of your choice
 - Replace (or add, if none exists) public note (‡z) in 856 fields
 - Delete specific field(s)
 - Add constant data to all records

- Create standing order for some sets to automatically receive new records added to the set
- Option to omit records that already have holdings attached
- Record Delivery
 - EDX (FTP), Product Services Web

Bibliographic Record Notification



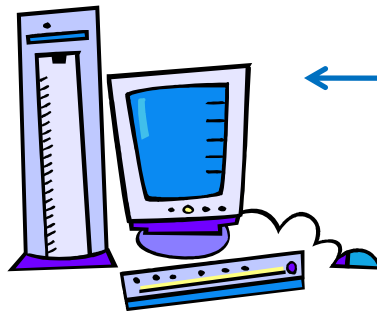
Record in your ILS

100: 1	: Galloway, Steven, d1975-
245: 14	: The cellist of Sarajevo / Steven Galloway.
260:	: New York : b Riverhead Books, c 2008.
300:	: p. cm.
650: 0	: Yugoslav War, 1991-1995 \$v Fiction.
650: 0	: Violoncellists \$v Fiction.
650: 0	: Snipers \$v Fiction.
651: 0	: Sarajevo (Bosnia and Herzegovina) \$v Fiction.
655: 7	: War stories. 2g \$f



Upgraded WorldCat record

Upgraded record in your ILS



100	1	Galloway, Steven, \$d 1975-	
245	1 4	The cellist of Sarajevo / \$c Steven Galloway.	
260		New York : \$b Riverhead Books, c 2008.	
300		xvii, 235 p. ; \$c 19 cm.	
520		While a cellist plays at the site of a mortar attack, his neighbors, two other men set out in search of bread and water to sustain themselves as her army becomes increasingly threatened. The cellist's life is the life of the cellist.	
651	0	Sarajevo (Bosnia and Herzegovina) \$v Fiction.	
650	0	Yugoslav War, 1991-1995 \$v Fiction.	
650	0	Violoncellists \$v Fiction.	
650	0	Snipers \$v Fiction.	
655	7	War stories. 2g \$f	



- Types of upgrades
 - Encoding level (All, 2, 3, 5, 7, 8, K, M)
 - Added or enhanced data in 505 Table of Contents
- Limit by format (books, sound recordings, scores, etc.)
- Limit by publication year (1995-)

- Record editing
 - Add constant data
 - Move call number to 099 or move 082 to 092
 - Delete fields (5XX, 6XX, 7XX, and/or 8XX)
- Record Delivery
 - EDX (FTP), Product Services Web

Bibliographic Record Notification benefits



- Get materials in the hands of patrons more quickly -
- accept brief record initially and later receive upgraded data
- Ease catalog maintenance—your staff spends less time searching for and editing records and has more time for other tasks
- Improved record maintained results in increased access to your library materials

Thank You!



Questions?

