

Florida Southern  
College

Lakeland, Florida

Feb. 17, 2011

# Tech Services Workflows: trends and good practices

David Whitehair

Senior Product Manager

OCLC

[david\\_whitehair@oclc.org](mailto:david_whitehair@oclc.org)



# 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

9



More links to online content/full text

More subject information

More tables of contents

Add summaries/abstracts

More information in the "details" tab\*

More author information

Add sample text/excerpts

1



Remove duplicate records

More edition information

More selection of non-English  
language items

More cover art

More reader reviews

More citation information

Add recommendations

Add editorial reviews from  
popular publications

More publisher information

4

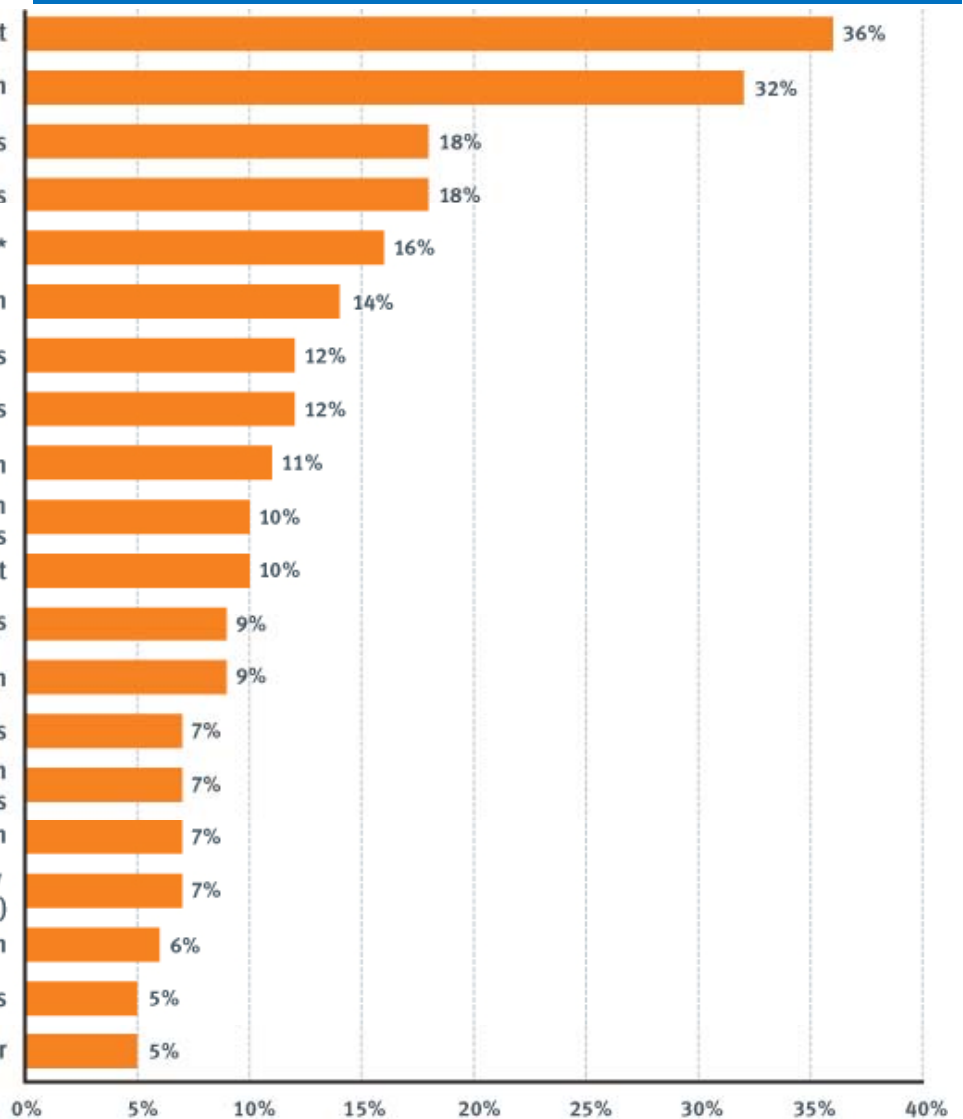


Increase accuracy  
(e.g., name, subject headings)

More format/type information

Add ratings

Other







Quilts 001 by Lansing Public Library, Lansing Illinois

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



Warm! by malamantra

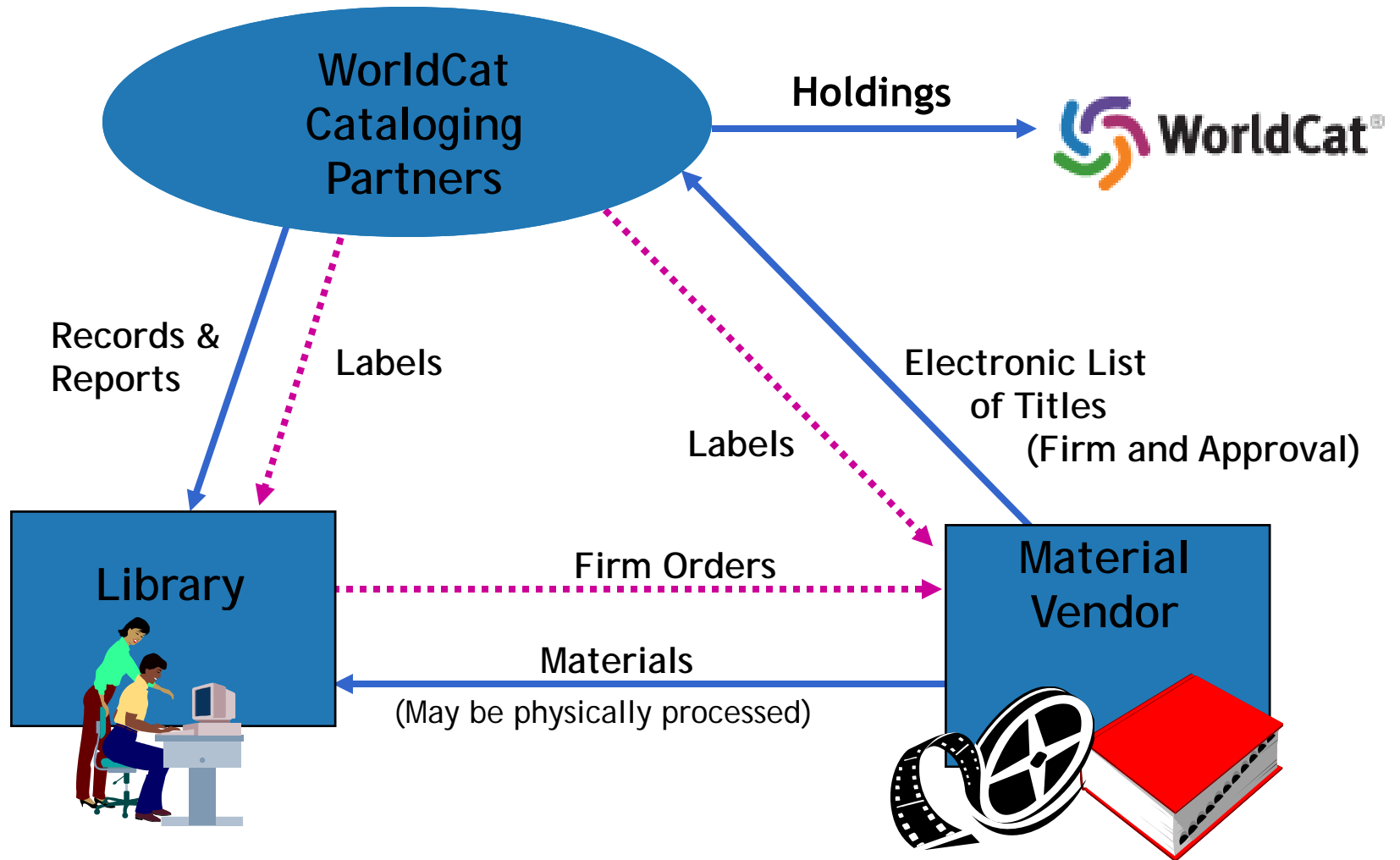
<http://www.flickr.com/photos/meghanandnick/2141323599/>

## Three OCLC services



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

# WorldCat Cataloging Partners



# WorldCat Cataloging Partners vendors



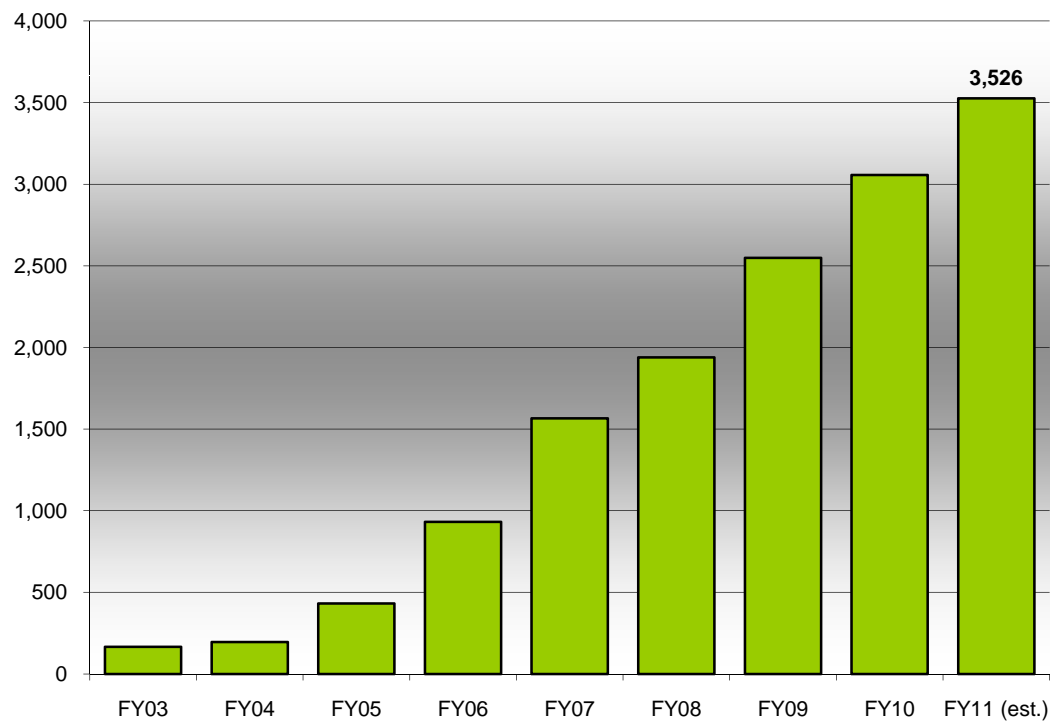
- Over 50 vendor partners
  - Baker & Taylor, Inc.
  - Casalini Libri
  - Coutts Library Services
  - Follett Library Resources
  - Harrassowitz
  - Ingram Library Services
  - Midwest Library Services
  - YBP Library Services

[http://www.oclc.org/catalogingpartners/wccp\\_partners.htm](http://www.oclc.org/catalogingpartners/wccp_partners.htm)

# WCP Growth



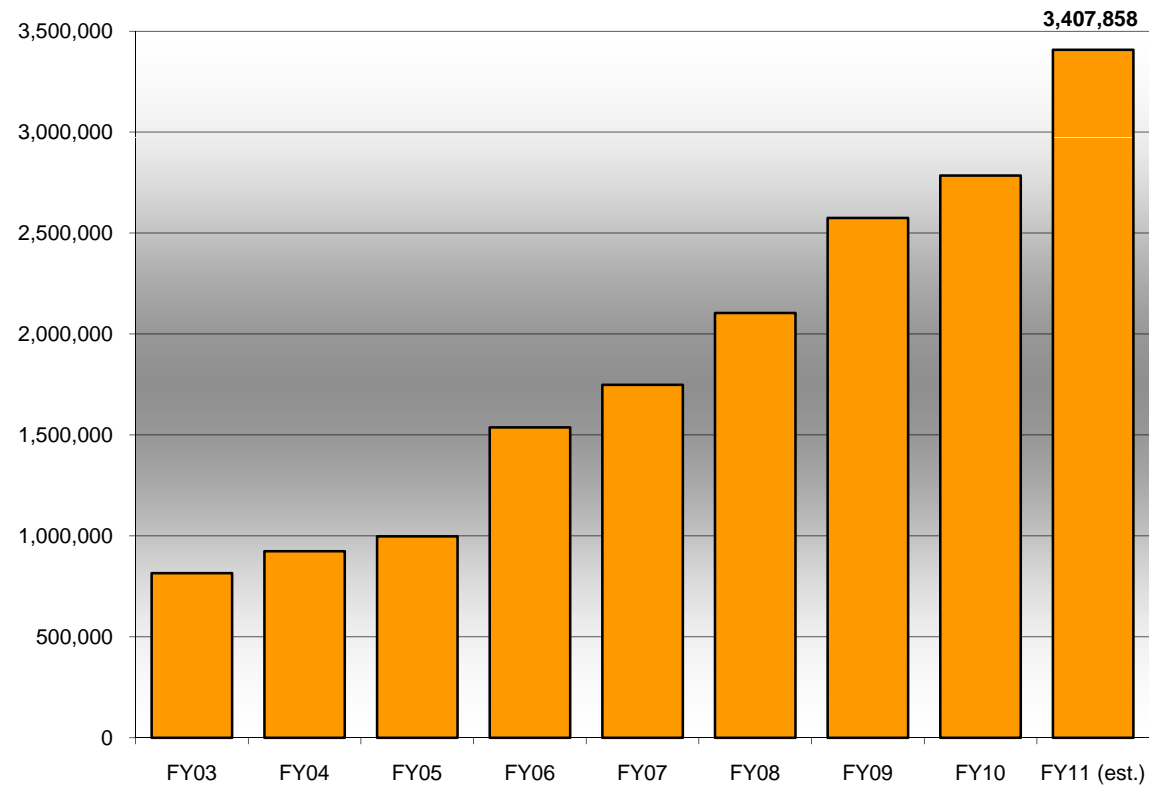
# of Libraries using WCP (at year end)



# 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



- 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?

