

Technical Services Workflow Efficiency Interest Group February 2, 2015 Betty Landesman

University of Baltimore Technical Services and Content Management Dept. July 2012

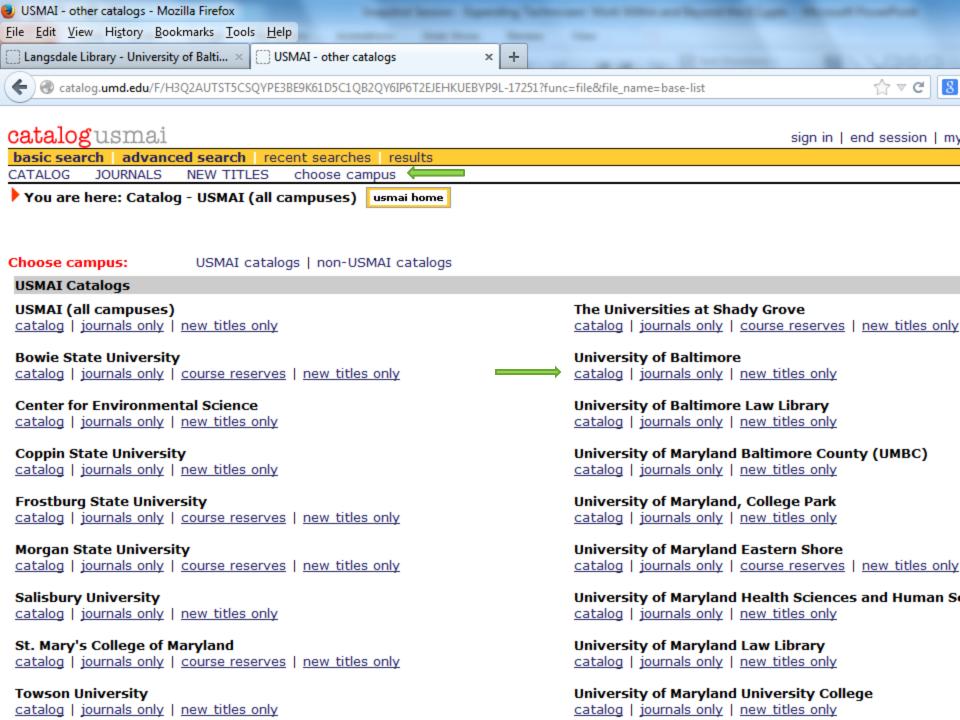
- 2 library faculty:
 Myself (Dept. Head)
 Electronic Resources Librarian
- 2 library technicians: "Acquisitions Technician" (Library Tech II) "Cataloging Technician" (Library Tech II)

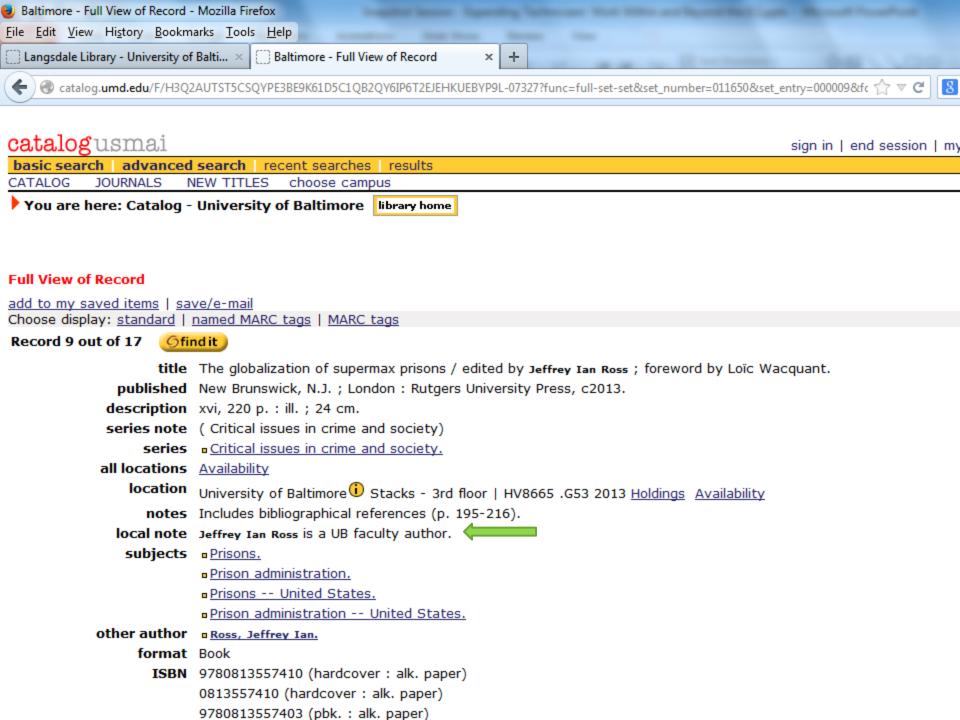
Early Changes - Within ILS

- Receipt of standing orders
 - ❖ The technician who checked in the volumes now also completed the item record creation and physical processing (barcode, security, label, etc.) instead of passing it on to the other technician
 - This necessitated the purchase of a second spine label printer – but it was worth it!
- Tracking value of gifts added to the collection
 - The technician who did the copy cataloging created an order record in the Acquisitions module (using a Gift fund) and entered the amount found in Amazon

Next - Augmenting the ILS

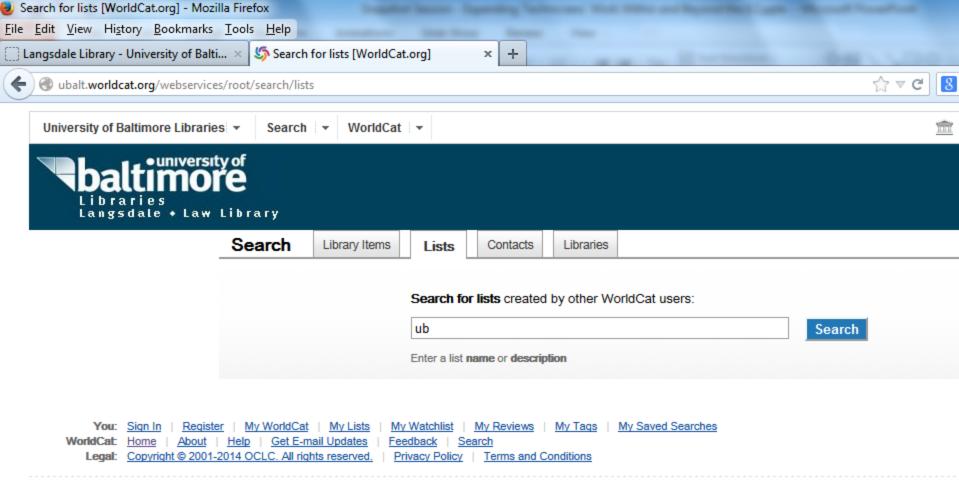
- Consortium implementation of "vintage" Aleph system
 - Shared bibliographic record
 - Local data in "special" fields so would only display in "your" catalog
 - And only in the Aleph catalog (not very visible in WorldCat Local record)
 - Started a program to add a note that someone was a UB faculty author – great idea but hard to see in catalog:



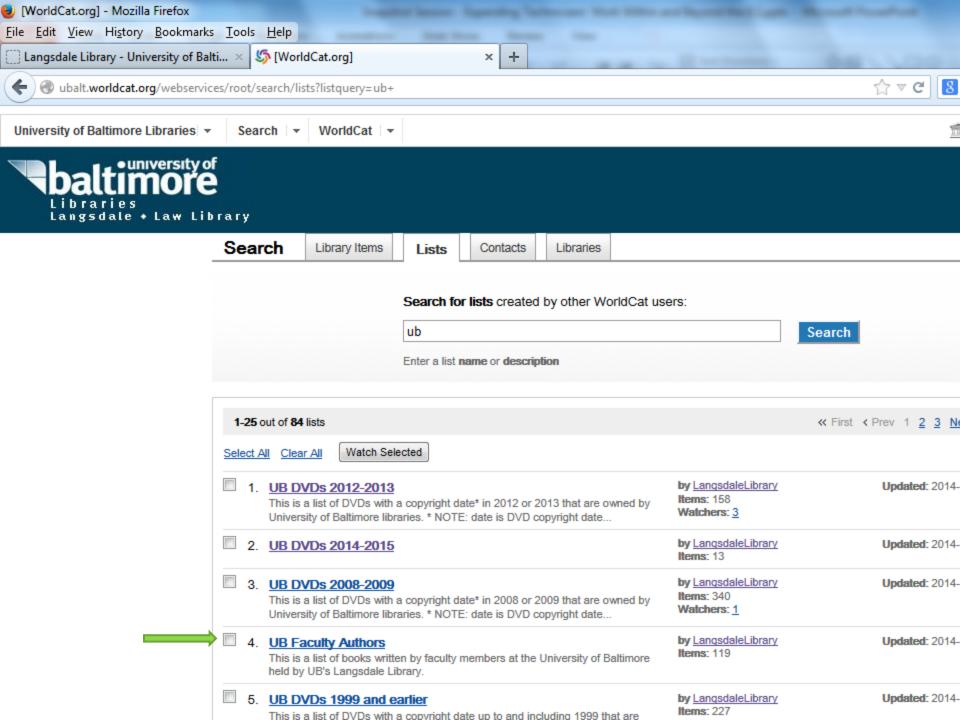


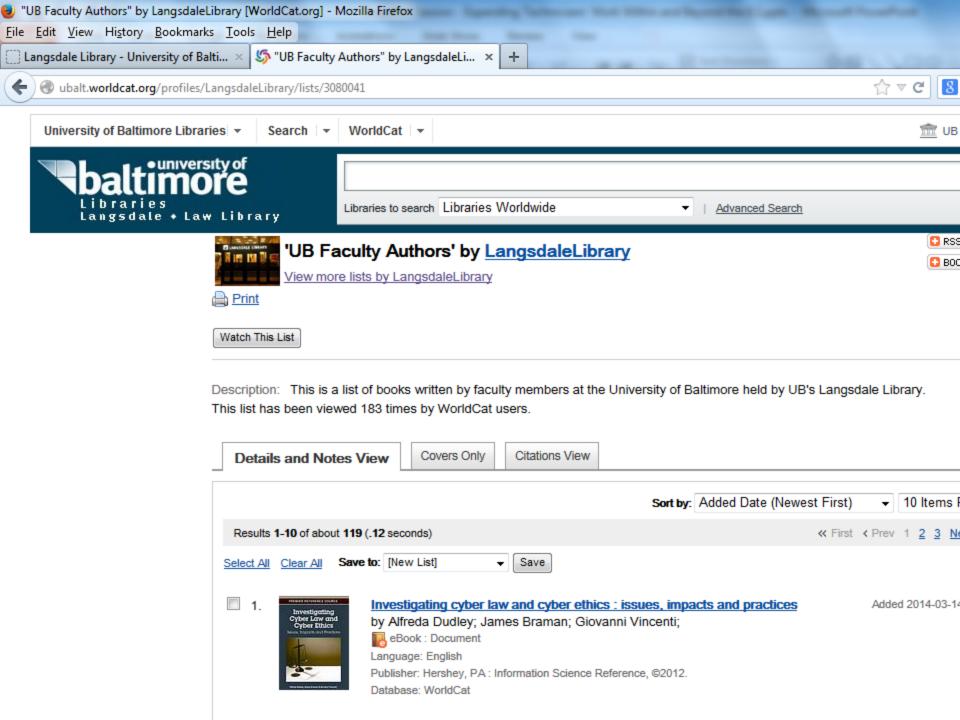
WorldCat Lists

- Learned about this feature from Reference staff, who had started lists for DVDs and Leisure Reading
- Created new lists for Faculty Authors and Alumni Authors, took on responsibility for updating all WorldCat lists as just one more step in cataloging new materials – while we have the item in our hand



WorldCat is the world's largest library catalog, helping you find library materials online.





eBook Processing

- We purchase individual titles only
 - Technicians created acquisitions records and catalog in Aleph, same as for print
 - Electronic Resources Librarian activated in SFX
 - (and all of the above were not always synchronous)

❖ Now:

- Order though jobber
- ❖ When notified that title is live, technician who does the copy cataloging receives the title in Aleph, completes bib/item work, AND activates the title in SFX
 - Complete Aleph work => copy OCLC record #, paste into Connexion to bring up record, update holdings => copy ISBN, paste into SFX object search, activate appropriate portfolio

A-Z List (Serials Solutions)

- Includes individual journal subscriptions, both print and electronic
- The Electronic Resources Librarian was the only person who updated Serials Solutions
- Catalog and A-Z often out of sync as we added/ cancelled subscriptions and did major journal withdrawal projects – different staff members updating different systems

First Step:

- HUGE print journal withdrawal project
 - Technician deleted from catalog and OCLC
 - ❖ Technician then learned to delete from A-Z list same idea, just different keystrokes

Next Steps:

- Major Aleph work needed to update journal records representing transition from print, subscription changes, etc.
- Trained technician who checked in (what's left of) our print journals in Aleph to update SFX and A-Z list

And Then Came The Tsunami Of Change ...

- Both technicians left and we hired new technicians
- The new acquisitions technician left after 9 months
- The new cataloging technician took on most of his responsibilities to keep things going – and thrived
- We rewrote the acquisitions technician's position to be halftime and include some responsibilities outside of TS
- ❖ We had the opportunity to review the position classifications and the full-time staff member was reclassified to Library Services Specialist
- Having achieved salary savings by changing a position to half-time, we are trying to get approval to hire another librarian to handle the hard cataloging

"Whoever Has the Item/ Information Completes the Work"

RECORDS ARE RECORDS
UPDATING IS UPDATING
THE SOFTWARE DOESN'T MATTER!

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