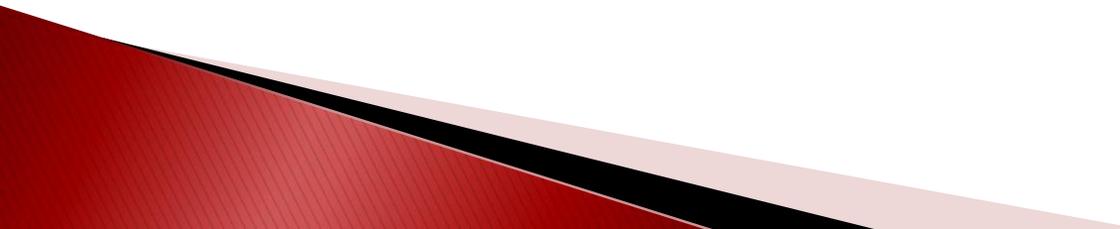


# **Best Practices for Collaboration in Technical Services and How it Can Filter Out to the Rest of the Library**

By Erin E. Boyd, Olga Casey, Ruth Elder, and Jana Slay



# **What is a Wiki and the History of the Troy University Technical Services Wiki**

**Ruth Elder for Jana Slay, M.L.I.S.**

Head of Technical Services

Troy University Library

Troy Campus

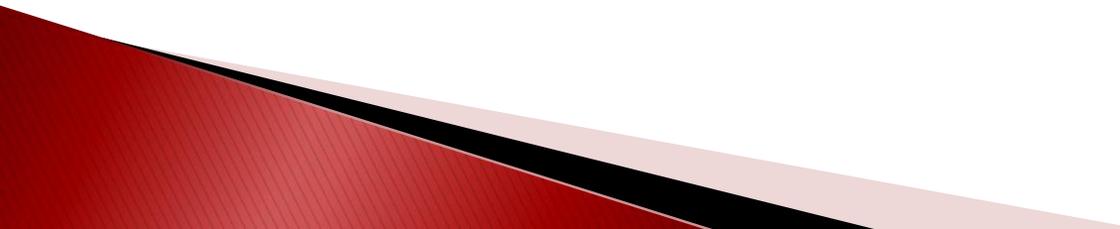


# A Bit of History

- ▶ Wikis
  - What is a wiki?
  - Who uses them?
  - Who can see my wiki?
- ▶ Troy University Technical Services
  - Our history
  - Previous manuals
  - Divergent practices



# Choosing a Wiki & Getting Started

- ▶ Reasons for choosing a wiki
  - ▶ Comparing wiki software
  - ▶ Choosing one that works for the organization
  - ▶ Defining goals
  - ▶ Creating a hierarchy
  - ▶ Involving others
- 

# Our Wiki

The screenshot shows a Confluence workspace page. At the top, the breadcrumb navigation reads 'My PBworks > Workspaces > TROY Libraries' Technical Services'. The user 'Ruth Elder' is logged in, with options for 'account', 'log out', and 'help'. Below the navigation, there are tabs for 'Wiki' and 'Pages & Files'. A search bar is present with the text 'Search this workspace'. The main content area has 'VIEW' and 'EDIT' tabs. The page title is '★ Troy University Libraries' Technical Services Wiki', with a note that it was last edited by Erin 1 year, 4 months ago. A 'Page history' link is visible. The main text states: 'This wiki will be used to create and revise uniform technical services' policies and procedures for Troy University Libraries. It will cover the areas:'. Below this, there are links for 'Acquisitions', 'Cataloging', 'Physical Processing', and 'Serials'. A comments section shows 5 comments, with a 'Delete all comments' link. A comment from 'Anonymous said' at 2:31 pm on Jun 18, 2007 is visible, with 'Reply' and 'Delete' options. A welcome message follows: 'Welcome to our wiki! I look forward to working with everyone on this project and hope that you will all enjoy making technical services run smoothly on all of our campuses. Please use the comments area to discuss how we can unify our various procedures across the libraries or why it is important to keep individual procedures under specific circumstances.' On the right side, there is a sidebar with a 'Create a page' and 'Upload files' section, and a 'Share this page' section with options like 'Put this page in a folder', 'Add Tags', and 'Copy this page'. Below that is a 'Navigator' section showing a tree view of 'Starred Pages and Files' including '949 field', 'Accessions Lists', 'Accessions Setup', 'Acquisitions', and 'Add a Call Number'. At the bottom of the sidebar is a 'Recent Activity' section showing 'Cataloger's Projects' renamed by Erin.

My PBworks > Workspaces > TROY Libraries' Technical Services

Ruth Elder account log out help

Wiki Pages & Files

Search this workspace

VIEW EDIT

## ★ Troy University Libraries' Technical Services Wiki

last edited by Erin 1 year, 4 months ago [Page history](#)

This wiki will be used to create and revise uniform technical services' policies and procedures for Troy University Libraries. It will cover the areas:

- [Acquisitions](#)
- [Cataloging](#)
- [Physical Processing](#)
- [Serials](#)

Comments (5) [Delete all comments](#)

**Anonymous said**  
at 2:31 pm on Jun 18, 2007  
[Reply](#) [Delete](#)

Welcome to our wiki! I look forward to working with everyone on this project and hope that you will all enjoy making technical services run smoothly on all of our campuses. Please use the comments area to discuss how we can unify our various procedures across the libraries or why it is important to keep individual procedures under specific circumstances.

**Navigator**

- ★ Starred Pages and Files
  - 949 field
  - Accessions Lists
  - Accessions Setup
  - Acquisitions
  - Add a Call Number

Pages Files options

**Recent Activity**

- [Cataloger's Projects](#)  
renamed by Erin

# Practical Uses of the Wiki

**Ruth Elder, M.L.S.**

Cataloging Librarian

Troy University Library

Troy Campus



# Cataloging Section

**VIEW** **EDIT**

☆ **Cataloging**

---

last edited by  Erin 3 months, 1 week ago

---

[Searching](#) -- how to find the best record

[Library Materials](#) -- by format

[Tools](#) -- Call numbers, Cutter numbers, Subject headings

[Connexion](#) -- Client or Browser, accessing OCLC

[Sirsi](#) -- Reports, Call Numbers, 949 subfields, etc.

[Catalogers' Projects](#) -- items for the Cataloging Librarians to review

# Cataloging Section

**VIEW** **EDIT**

☆ **Searching**

---

last edited by  Ruth Elder 11 months ago

---

[Cataloging](#) | [Searching](#)

[Search for record in OCLC Connexion Client](#)

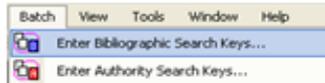
[Search for record in SIRSI](#)

# Cataloging Section

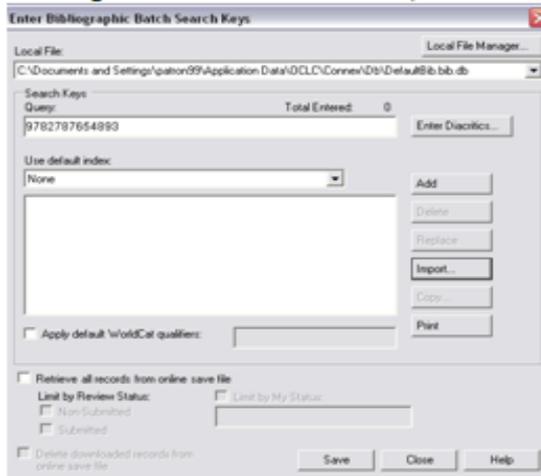
## Search for Record in OCLC Connexion:

### A. Search for several items with ISBNs:

1. On **Batch** menu click **Enter Bibliographic Search Keys**



2. In the **Query** box type ISBN – typically from back of book (10 or 13 numbers with nothing in front and no dashes)



3. Hit **Enter**
4. Continue until all ISBNs are entered then click **Save and Close**



# Cataloging Section

[VIEW](#) [EDIT](#)

---

☆ **Library Materials**

---

last edited by  [elderruth3@...](#) 4 months, 3 weeks ago

---

[Cataloging](#) | [Materials by format](#)

[Books](#)

[Serials](#)

[A-V materials](#)

[Scores](#)

[Thesis](#)

[Digital images](#)

[Government Documents](#) -- when, where, and how

# Cataloging Section

VIEW

EDIT

## ☆ Tools

last edited by  eb 4 months ago

[Cataloging | Tools](#)

[Library of Congress Classification Outline](#)

[Classification Web](#) for Library of Congress Subject Headings, LC Call Numbers, LC - Dewey correlations, etc.

[Sudoc Classification](#) for understanding Government Documents call numbers

[Cutter Table](#) for LC class numbers

[Cutter-Sanborn Table](#) for Dewey class numbers

[US Codes in AACR2](#)

# Cataloging Section

VIEW EDIT

---

☆ **Connexion**

---

last edited by  Erin 11 months ago  Pag

---

[Cataloging](#) | Connexion

OCLC is Troy's source for bibliographic records. Member libraries worldwide contribute new cataloging records and download copies of existing records into local systems.

Help and information from OCLC on [using Connexion](#) (Browser and Client)

Connexion Client [Tutorials](#) , including Overview, Save File, Batch Processing, and more

Connexion Browser [Tutorials](#) , including Overview, Editing Bibliographic Data, Managing Constant Data, and more

Logon to Connexion [Browser](#)

Download Connexion [Client](#)

[Troy Libraries Holding Codes](#)

[Creating Constant Data and Automatic Stamps](#)

[Pinning Records for Comparison](#)

# Cataloging Section

**VIEW** **EDIT**

☆ **Sirsi**

---

last edited by  Erin 4 months ago

---

[BibLoad Report -- LC with overlay -- older Sirsi](#)

[Withdrawing Materials](#)

[Editing Records and Adding Volumes and Copies](#)

[Updated Adding Volumes](#)

[949 field](#)

[Toolbar Wizard Button Names](#)

**\*\*** [Procedures for new version of SIRSI/Dynix Symphony](#)

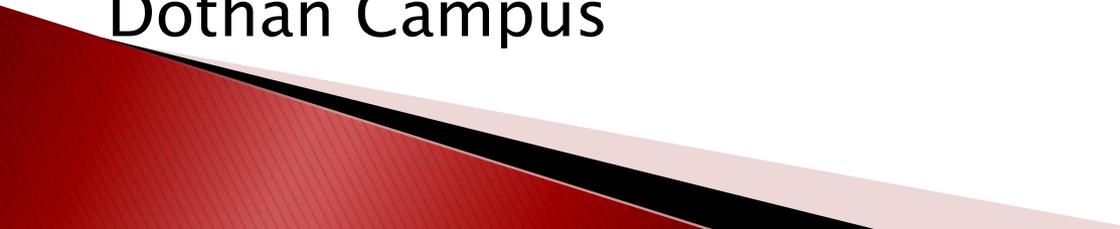
# Cataloging Meetings & Communication

**Olga Casey, M.L.I.S.**

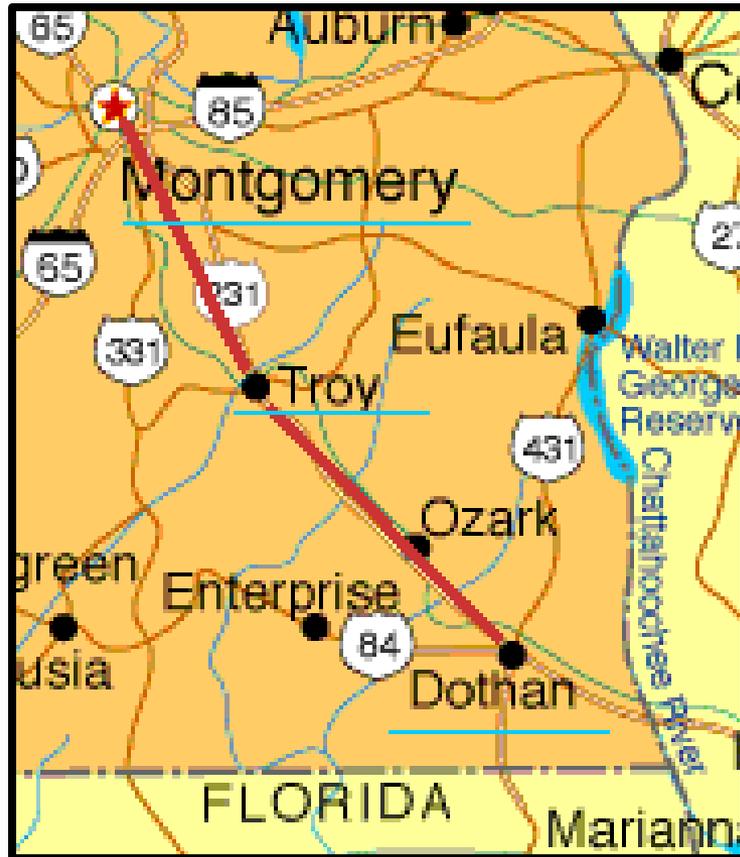
Technical Services Librarian

Troy University

Dothan Campus



# Regular Cataloging Meetings



# Forms of Communication

- ▶ Wiki
- ▶ Phone
- ▶ Email
- ▶ Google Documents
- ▶ Skype (discussed but didn't try yet)
- ▶ Face2face meetings
- ▶ Etc.



# Regular Cataloging Meetings

## Typical Agenda:

- ▶ On-line training
- ▶ Preparation of poster sessions and presentations
- ▶ Setting up of cataloging software in a uniform way
- ▶ Problem solving
- ▶ Discussion of new developments (e.g. RDA)

# Regular Cataloging Meetings

## Outcomes:

- ▶ Professional development
- ▶ Consistency and uniformity of bibliographic records
- ▶ Openness and readiness for changes and innovations
- ▶ Mutual support, absence of the feeling of isolation from the colleagues

# Initiating Collaboration & Filtering to Other Campus Libraries and Library Departments

**Erin E. Boyd, M.L.I.S.**

Cataloging/Reference Librarian

Rosa Parks Library

Troy University, Montgomery Campus

# Filtering to the Rest of the Library

- Created Summer 2010
- Organize all departments' policies and procedures
- Cross training
- Invitation Only

## ★ Rosa Parks Library Wiki Manual

last edited by  Erin 0 minutes ago  Page history

Welcome to the Internal wiki for the Rosa Parks Library at Troy University Montgomery Campus!

**Purpose:** *This wiki will be used as a tool to communicate all current policies and procedures of each department. As policies are updated, please update them on your portion of the wiki.*

Share, collaborate, and learn from each department at the library!

<a href="#">Library Staff Information</a>	<a href="#">Workstudy Schedule</a>
<a href="#">FAQ in the Library</a>	<a href="#">Librarian Weekend Schedule / Library Staff Weekend Schedule</a>



Access Services



Reference Services



Technical Services



Student Assistants

# Access Services

## 1.) Circulation

- Policies/Procedures
- Reserves Policies
- Information Sheets

## 2.) Interlibrary Loan

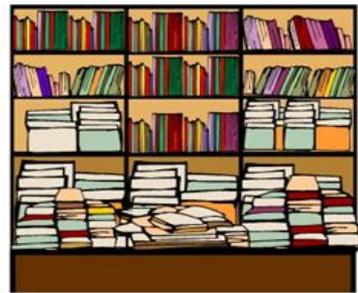
- Policies
- Procedures

## 3.) Stacks Management

- Shelf Reading Training and Assignments
- Inventory
- Physical Count Information

☆ Access Services

last edited by  eb 0 minutes ago

 <p>Circulation</p>	 <p>Interlibrary Loan</p>
 <p>Stacks Management</p>	

[Wiki Home](#)

# Reference Services

## 1.) Reference

- FAQs from Patrons
- KIOSK Information Sheets

## 2.) Library Instruction

- Commonly Used Handouts
- Information Sheets
- Library Instruction Information

## 3.) Periodicals

- Check-in Procedures
- University-wide Procedures

### ☆ Reference Services

last edited by [eb](#) 3 months, 3 weeks ago

 <p>Reference</p>	 <p>Library Instruction</p>
 <p>Periodicals</p>	

[Wiki Home](#)

# Technical Services (Montgomery)

## 1.) Acquisitions

- Procedures
- Vendor information

## 2.) Cataloging

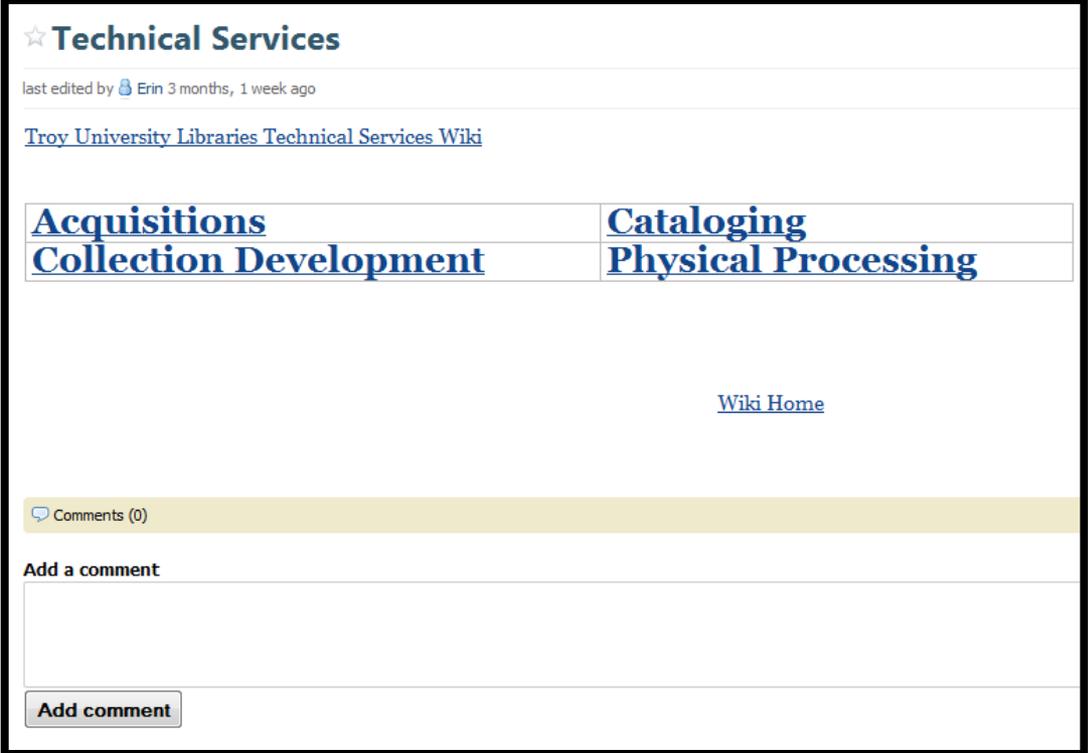
- Procedures
- Cataloging tools
- Stats sheets

## 3.) Collection Development

- Collection/Weeding policies
- Order forms
- Liaison assignments

## 4.) Physical Processing

- Procedures for each collection



The screenshot shows a Wiki page titled "Technical Services" with a star icon. Below the title, it indicates the page was last edited by Erin 3 months, 1 week ago. A link for "Troy University Libraries Technical Services Wiki" is provided. A table lists four categories: Acquisitions, Cataloging, Collection Development, and Physical Processing. A "Wiki Home" link is located below the table. A comments section shows 0 comments and includes an "Add a comment" text area and button.

☆ **Technical Services**

last edited by  Erin 3 months, 1 week ago

[Troy University Libraries Technical Services Wiki](#)

<a href="#">Acquisitions</a>	<a href="#">Cataloging</a>
<a href="#">Collection Development</a>	<a href="#">Physical Processing</a>

[Wiki Home](#)

 Comments (0)

Add a comment

# Student Assistants – Circulation

## ☆ Rosa Parks Library Student Assistants

last edited by  Amy Smith 3 months ago

 Page history

Welcome to the Internal wiki for Student Assistants at the Rosa Parks Library at Troy University Montgomery Campus!

**Purpose:** *This wiki will be used as a tool for communication and training of all current policies and procedures at the Circulation Desk.*

<a href="#">Information</a>	<a href="#">Policies</a>	<a href="#">Workstudy Schedule</a>
<a href="#">Procedures</a>	<a href="#">Stacks Maintenance</a>	<a href="#">Opening and Closing</a>
<a href="#">Telephone</a>	<a href="#">Interlibrary Loan (ILL)</a>	<a href="#">Daily Activities</a>

 Comments (0)

Add a comment

Add comment

0/2000

 Invite more people

 Share this page

 Put this page in a folder

 Add Tags

 Control access to this page

 Copy this page

### SideBar

If you have any questions, please see Amy. [amishoe@troy.edu](mailto:amishoe@troy.edu)  
(334)241-9785

[Edit the sidebar](#)

### Recent Activity

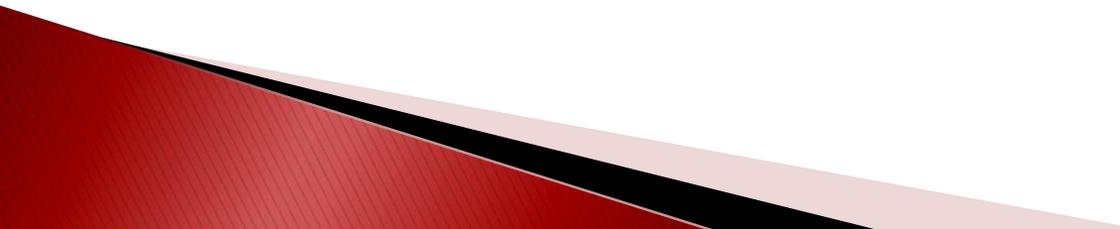
 [Workstudy Schedule](#)  
edited by Amy Smith

 [Workstudy Schedule](#)  
edited by Amy Smith

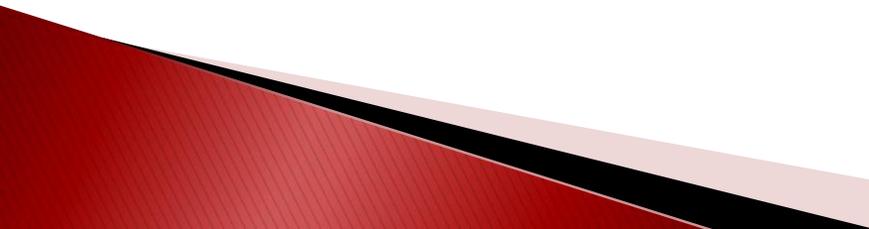
 [Shelf Reading Assignments](#)  
edited by Student Assistants

 [Shelf Reading Assignments](#)

# Collaboration Ideas Implemented @ Montgomery

- ▶ Internal wiki for library system-wide policy creation and revisions
  - ▶ Departmental wikis for policies and training
  - ▶ A space to collaborate on library or bibliographic instruction information sheets and handouts
- 

# Other Collaboration Ideas

- ▶ **Collaboration among library staff**
    - Create departmental wikis for policies and training
    - Create an internal wiki for Library System wide policy creation and revisions
    - Project management
  
  - ▶ **Collaboration among libraries**
    - Consortium agreements
    - Statewide
- 

# Questions?

- ▶ Erin Boyd – eeboyd@troy.edu
- ▶ Olga Casey – oknyaz@troy.edu
- ▶ Ruth Elder – relder71917@troy.edu
- ▶ Jana Slay – jslay@troy.edu

Evaluation form:

<http://www.surveymonkey.com/s/alctsevents2012>