

Catalogers Group

October 25, 2007

Minutes

Present: John Riemer, Sara Layne, Louise Ratliff (recorder), Claudia Horning, Nancy Norris, Nora Avetyan, Valerie Bross, Caroline Miller, Elaine Sakamoto, Raphael Villena, Rita Stumps, Chamy Kincy, Sharon Benamou, Laura Horwitz, Paul Priebe, Peter Fletcher, Anna Berkovich, Nelson Velasquez

Upcoming R2 Workflow Consultants Visit

John explained as background that we had wanted a consultant at the time of the move, but they were unavailable. The emphasis has changed a great deal since then. Major focus of consultants now is to look at the feeds of work to Acq and Cat, from many different places. They will look at cross acq-cat workflow, but mainly at collection development.

John asked for questions staff had about Sharon Farb's Oct 24 message.

Objectives #2 and 3 relate to an expansion of shelf-ready services and cataloging on receipt. Seeks clarification about whether these are objectives for R2 to look at. What is the difference between these two? Shelf-ready refers to material already physically prepared and ready to shelve, with bib records delivered ready for loading into Voyager. Cataloging on receipt (usually taking place in acquisitions units) is done for material that lends itself to little or no intervention. Material cataloged on receipt still needs physical preparation. Outsourcing of cataloging usually refers to sending material to an outside agency after it is received, which we do now for Arabic through OCLC TechPro. The future extent of cataloging on receipt at UCLA remains to be seen. Right now, for YBP, some 7500 books per year come shelf-ready.

Authority control is done post cataloging. Do the vendors generate authority records? Our shelf-ready profile consists primarily of PCC and DLC bib records, for which authority records usually have been created already. With TechPro, OCLC does the cataloging, but does not create name authority records.

How does this impact our PCC participation? John encourages PCC cataloging for as much original cataloging as possible.

What does cataloging on receipt entail? The book does not come physically prepared but Acquisitions could "update" the OCLC record when they receive the book and download copy.

Problems were identified in the item records that recently began being created upon receipt. Clean up is found to be needed in cases where the work is only partially done. Example, items are entered without volume numbers in them. Sometimes the barcodes are attached to the wrong bib record or holdings record.

Rita: If more work were to shift to Acquisitions, what would happen to our jobs? John: there will always be plenty of work to do, e.g., producing fuller records in lieu of what we now minicat; create digital library project metadata (re-do existing or add new). Lots of records go through copy cataloging that could use more headings. Also, with the WorldCat Local plan for using WorldCat records for our online catalog, editing would have to be done directly to WorldCat records instead of to Voyager. He certainly expects to need as many people as we have now. The overall size of the workload will not lessen, but will increase.

Paul: If responsibilities shift, would Acquisitions be trained? John: recently they requested training on searching Voyager & OCLC & on how to recognize a serial. They could use a training coordinator, which they do not have.

Laura. Re standardization, what provisions are being made for other branches that have their own acquisitions unit, like Music? How involved will they be in the consultant meetings? This will really affect them. John: if acquisitions activities are done in several places, the more similar they can be, the better. If there are reasons to deviate, that's another thing; but the general trend now is to centralize things. Music does have some unique aspects, so it lends itself less to centralization.

Sara: Another approach is to try to define carefully what would qualify for shelf-ready or cataloging on receipt. Right now, for example, shelf ready does not include numbered series; that's an approach to managing this process. Priebe wonders how customizable this may be.

Laura: LC does not have good copy for this music & scores.

Rita: Other languages would not be good candidates for shelf ready, e.g. Scandinavian. Many of these need parallel records. Sara: We can evaluate what copy we edit very little and that might be a good candidate.

Brainstorming about Sharon Farb's list of things to discuss for the R2 visit:

Documents:

Paul: Annual reports & statistics will not be normal for the past year, as the move affected so much. They should not be viewed as normal. Look at the data from earlier years.

Laura: staffing issues have also affected productivity this past year.

Sharon B: It would be helpful to look at annual reports from us, SEL, Biomed, etc. to see what went on before now.

ISSUES:

Valerie: The point of view. quality control, the type of community we are serving (specialized interests). For example, shelf-ready as applied to Arabic—how would you be serving the Middle East Studies dept. with American materials? The underlying assumption is that everything is a barrier to shelf-ready, but the barrier is that we are collecting these materials. Important to emphasize that our collections are what make us unique.

Rita: there will never be shelf-ready for many of our materials. We have many little workflows here and there for different types of materials, languages, and clients.

John: There are many ways in which the work and materials flow to us.

Sara: some of the barriers to shelf ready have nothing to do with us. For example, how do you get a book to the right location, shelf ready? It is a whole workflow question. There are different workflows for different branches and vendors. Technical barriers exist.

Nora: Talking about small libraries. Armenian and Persian materials don't come from publishers in Iran or Armenia. The records that exist are very bad (transliteration, structure, etc.) UCLA is the center of Southern California with our specialized collections.

Peter: Our physical separation from the collections is an obvious issue that should not be overlooked.

Rita: this is a huge issue for the studies centers. It is very convoluted getting things back and forth. Priebe, problematic communication with selectors. Ratliff: communication with academic schools and departments, such as Public Policy, for theses and dissertations.

Peter doesn't know whether the selector has seen the items that were left on the "show shelf" which need answers to his questions.

John: Could we use scanner/fax machines to send info back and forth?

John highlighted aspects of the upcoming R2 visit: We have recommended grouping together the selectors, acquisitions, and catalogers for particular formats/issues and discussing together. Possible groupings: Maps, Music, Arabic & other non-Roman language materials, government docs, Shared Print materials. Who else should they visit with? There are 30 1-hour time slots for meetings with various people/groups. They will write up a report by sometime in December.

Documentation to give to them:

Annual reports, stats, Kinross Client Units and Workflows task force reports. Our unit website will give them the big picture of the detail of our work, copycat and rapid processing procedures, Voyager documents that deal with implementation, workflows, migration.

Issue: Tracking materials. E-resources. Clean up issues that involve people in cataloging and in acquisitions (e.g., monographs vs. serials). This has come up recently in TPAC.

Issue: Benamou: language materials for which we have no expertise.

BSTF Report, SOPAG page (especially the FAQ on collaboration with OCLC)

Length of time it takes to replace staff who have left. Time & training to replace staff.

Staff cuts made at time of the 2003 consolidation, and the consequences of dealing with the resulting workload, which has not gone away.

YRL renovation, will there be an impact? As we reorganize, we continually move people around—this amounts to a “tax” on workflow.

High priority issues for R2:

Ratliff: Areas of back-and-forth between cataloging and acquisitions, both administrative and technical approaches to dealing with bibliographic problem resolution.

Benamou: Have R2 look at our longstanding problems—issues about what selectors acquire and what we do with it.

Norris: The layout of Kinross, and its effectiveness. John: We could give them the floorplan as it exists now, showing which groups are in which locations, the one we used for our open house.

Miller: issue of storage of backlogs; lack of training facilities. Their view of the floorplan might be helpful and generate some constructive ideas.

Arabic is the Number One priority!!

Rita: the copy is really poor and it requires a lot of work. It is not straightforward because of the records, in addition to the language. Every aspect, from selection all the way down to minicattling, is problematic. For example, with copy, subjects are often just wrong.

