



Ohio Valley Group of Technical Services Librarians

2006 Conference

"Crossroads to the Future"

Wednesday, May 10, 2006

5:30-7:30 pm: **Welcome Reception** / Lilly Library

The Lilly Library is the principal rare books, manuscripts, and special collections repository of Indiana University, serving as a resource for scholars throughout the world as well as a center of cultural enrichment.

Thursday, May 11, 2006

8:00-9:00 am: **Registration & Breakfast** / Bloomington Convention Center

9:00-10:15 am: **Keynote Address: Thriving at the Crossroads** / Olcott Young Room

The theme of this year's OVGTSL conference, "Crossroads to the Future," resonates with us all. We technical services librarians may feel as though we are all at a crossroads, choosing between uncertain paths and making risky decisions. But there is another way to consider the crossroads metaphor in the technical services context. In her address, Ms. Sellberg will explore what being at a crossroads means and will argue that, for technical services librarians and the institutions they serve, there could be no better place to be.

Presenter: Roxanne Sellberg (Northwestern University)

10:15-10:30 am: **Break**

10:30-11:15 am: **Concurrent Session A**

- ⊕ **Session A1: Moving Toward a Patron Centered Collection Model: A Purchase-on-Demand Project at Indiana State University** / Bank One Rooms

During the winter of 2003, ISU's acquisitions librarian and circulation librarian embarked upon a project to provide requested interlibrary loan (ILL) materials via a purchase-on-demand program in order to experiment with faster, more efficient ways to get materials into the hands of patrons for improved customer service. The approach that was favored was to request the books through ILL at the same time as purchasing them through acquisitions, thereby giving a side-by-side comparison between the two methods. It was observed that this project would provide an ideal

opportunity to track productivity of individual units, since the time the items remained in each unit would be tracked through the library's integrated library system.

As the project has progressed, it has moved from being an exercise in instituting more efficient acquisitions methods to an effective collection development process. Both the purchasing and borrowing of titles, along with the use of multiple vendors, has been abandoned in favor of purchasing only through Amazon.com. The intent of tracking subsequent circulations and distributing the resulting information to liaisons is to create a more patron driven selection program.

Presenters: Elizabeth Lorenzen and Alberta Davis Comer (Indiana State University)

⊕ **Session A2: Metadata for You and Me: Moving Towards Shareable Metadata** / Olcott Young Room

Digital library development, particularly over the past five years, has focused increasingly on the aggregation of digital content and/or the metadata describing such content. Communication protocols like the Open Archives Initiative Protocol for Metadata Harvesting (OAI-PMH) and common metadata encoding schemas such as Dublin Core have facilitated the ease with which metadata from multiple sources can be pooled together. However, numerous studies, particularly within the OAI-PMH context, have discussed the difficulty in building services beyond search and access over metadata aggregations because of the poor metadata quality and shareability. Metadata often is not interoperable; that is, it does not make sense or loses crucial context when taken out of its local environment. We will discuss two Digital Library Federation initiatives we are currently involved in which encourage the creation of shareable metadata: [Best Practices for Shareable Metadata](#), a community-developed set of guidelines and recommendations for authoring shareable metadata; and the [MODS Implementation Guidelines](#), a set of specific recommendations for creating MODS records meant to be shared with others. The presentation will cover the rationale for sharing metadata, the common problems seen in metadata aggregations, and some proposed solutions as typified in the two initiatives described above.

Presenters: Jenn Riley (Indiana University, Bloomington)
Sarah Shreeves (University of Illinois at Urbana-Champaign)

⊕ **Session A3: Being in the Middle Sure Makes Life Interesting** / Cook Group Rooms

Technical services departments are caught in the middle of a large sandwich. One layer is the need to continue to manage the same products as we have in the past. Libraries still buy print books, serials, continuations, media-all of these materials require cataloging, processing and shelving. These are the "mark it and park it" items. The other layer is the electronic and integrating formats that require a different type of handling and organizational management. As a matter of fact, most of this the department never handles, as they are mostly virtual resources. There are URLs to manage, linking to and from web sites and the issues of changing ownership and licensing of content. Technical services and especially catalogers are challenged daily to maintain order and accessibility.

The three librarians will discuss how the catalogers are managing the short-term such as cataloging standards, implementation of new software, integrating national standards such as MARC holdings format. We will look at this through the lens of migration to Millennium (III), Connexion (OCLC), and training across jurisdictions. Long-term trends and the likely impact on technical services will also be addressed.

Presenters: Sharon Bressert-Purtee and Susan Banoun (University of Cincinnati)



11:30 am-12:15 pm: Concurrent Session B

⊕ **Session B1: Preparing for Electronic Claiming and Electronic Invoicing: Working with Your Serials Vendor** / Bank One Rooms

Whether you are migrating to a new system or ready for electronic claiming and/or invoicing on an existing system, collaborating with your serials vendor can make the process more efficient and effective. Hear a detailed discussion of the process involved when instituting electronic claiming and/or electronic invoicing and how a library and a serials vendor managed the process from beginning to end. Beginning with the cleaning of serial check in and order records, configuring your system and working with your serials vendor to integrate the electronic processes into your procedures.

Presenters: Eve Davis (EBSCO Information Services)
Michelle Early (Xavier University, Cincinnati)

⊕ **Session B2: Digital Semantics: Automated Metadata Capture Translation and Delivery** / Cook Group Rooms

OCLC has multiple projects underway to capture technical, structural, administrative, descriptive, and preservation, metadata. The metadata is captured from many alien sources, including Dublin Core, common .MIME file types, vendor inventory systems, Web Sites, etc. OCLC is working on methods of capturing this data and translating (that is, cross-walking), it into MARC and other formats. After cataloging enhancements and quality control, the data may be delivered to libraries in MARC and also in other formats including ONIX, Dublin Core, and other output formats. All of these projects are in various stages of development and thought at OCLC. The presentation will give an overview of the various efforts, the prominent metadata schemes, how they fit together, and how the projects will help libraries crosswalk, enhance, and manage collections using the various types of metadata semantics, metadata input schemes, and metadata output formats in the digital library environment.

Presenter: Tony Chirakos (OCLC Online Computer Library Center)

12:15-1:45 pm: Lunch & Business Meeting / Olcott Young Room

1:45-2:30 pm: Concurrent Session C

⊕ **Session C1: Don't Shovel Snow with a Soup Spoon: Effective Technical Service Outsourcing Using OCLC PromptCat and Vendor Processing Services** / Bank One Rooms

Each year the Michigan State University Libraries purchases thousands of new monographs to help meet the research and curricular needs of the University's students and faculty. While the university's commitment to protect the materials budget from reductions during economic downturns is laudable, the Libraries' Technical Services division is faced with the challenge of receiving, cataloging, and processing its new receipts with less staff than ever before. Something like trying to clear twelve inches of snow from your driveway using nothing but a soup spoon! At MSU, monographs ordered from Yankee Book Peddler are received shelf-ready through OCLC's PromptCat service, providing enhanced processing efficiency for fully half of the library's monographic orders. This presentation will describe the Libraries' shelf-ready workflow, compare the workflow to traditional copy cataloging routines, discuss advantages and disadvantages of the shelf-ready approach, and provide at least five reasons why PromptCat shelf-ready processing is a more effective snow shovel than a soup spoon

Presenter: Leah Black (Michigan State University)

⊕ **Session C2: A Model Storage Collection – A Fork in the Road or a Roundabout** / Cook Group Rooms

The University of Kentucky Libraries recently received funds from a state grant (Library Services and Technology Act, Library Automation for Academic Libraries Subgrant) to create, operate, and evaluate a model library storage facility. The objective of the project is to create a model of a high density storage facility which will serve as the precursor of a permanent off-site storage facility which the library intends to construct when funds become available. Through the course of the grant, we will develop and test the capabilities of the Voyager Integrated Library System to make Voyager function as the facility's automated retrieval inventory control system. Items sent to the model facility will be shelved by size in order to maximize space. We will develop a workflow for accession, retrieval and delivery of items. Although this model facility is located within an existing library building located on the UK campus, the workflows that are developed during the course of the project will be carried over into the operation of the library's permanent off-site storage facility when it is constructed. The presenters will describe their experiences in planning for, creating, operating, and evaluating the model library storage facility.

Presenters: Nancy Lewis and Mary McLaren (University of Kentucky)

⊕ **Session C3: Five Years of Electronic Resources Cataloging at Ohio University Libraries** / Olcott Young Room

Since the hiring of the first formally titled Electronic Resources Cataloger in 2001, Ohio University's Alden Library has embarked on ambitious and pioneering efforts to provide access to electronic resources via the catalog. Lessons learned from OU's experience can be applied to fledgling e-resource cataloging programs at other libraries, and provide a foundation for carrying existing programs into the future. Aspects of OU's experience to be addressed include:

- E-resource cataloging policies and procedures: from chaos to consistency
- Coordinating acquisitions and cataloging: from chaos to consistency
- Which resources get cataloged: from squeaky-wheel system to inclusive policy
- Cooperative cataloging and outsourcing: from ignorance and resistance to knowledge and acceptance
- Developing a sense of responsibility and ownership toward e-resource cataloging

Presenter: Carrie Preston (Ohio University)

2:30-3:15 pm: Concurrent Session D

⊕ **Session D1: When Two Streams Meet: Joining Acquisitions and Federal Document Processing** / Bank One Rooms

Due to the library reorganization, the Acquisitions Dept. and Federal Depository Librarian were asked to investigate and test the possibility of Acquisitions staff handling current receipt and check-in of federal documents. In August 2005, with a small transition group, the project began. The transition group reviewed the current process and developed a strategy to mainstream receipt and check-in. This presentation will address this process and the resulting procedures and training methods.

Presenters: Kate Seago and Sandra McAninch (University of Kentucky)

✦ **Session D2: Testing Federated Search Activated Resources in a Multi-Campus Installation: What Can Go Wrong** / Cook Group Rooms

Indiana University purchased SIRSI OneSearch and is providing federated searching to seven of the campuses in the I.U. system. The MUSE Administrative Console and federated searching server are located in Bloomington but testing must occur on each campus. The challenge has been extending OneSearch to a multiple campus state-wide organization with each campus having its own web pages, subscriptions, IP addresses, proxy servers, and native database configurations to add to the already significant complexity of federated searching. Testing of activated resources on the Kokomo campus has evolved from defining success as clicking on a result and getting an article to needing to verify that the correct resource is being searched, that it is accessible from off-campus, and that all and only the subscribed portion of the resource is being searched, as well as many other possible problems. Testing has also expanded to include the analysis and comparison of search defaults and functionality in the native database and within OneSearch. This analysis has led to the question of whether search defaults should be made as consistent as possible for all subscribed resources to provide more effective federated searching.

Presenter: Kirsten Leonard (Indiana University Kokomo)

✦ **Session D3: 'Oh, So We're Going to Be Just Like Amazon, Huh?': Preparing the Catalog for FRBR, XML, Open-Source ILSs and Patron-Initiated Catalog Enhancement** / Olcott Young Room

As we move closer to integrating our catalogs with other information sources, we find that earlier cataloging practices and the necessity of quick-and-dirty methods for acquiring catalog records have caused innumerable challenges to this integration. In this presentation I will detail some of the more egregious errors in MARC records, tools for repairing them and explore techniques for creating a more robust catalog. I will also show some current examples of enhanced catalogs and share a vision for Miami University's enhanced catalog and discuss the value of local catalogs in a world of increasing globalization of information.

Presenter: Ross Shanley-Roberts (Miami University (Ohio))

3:15-3:30 pm: Break

3:30-5:00 pm: Optional Tours: Participants will have the opportunity to tour these places:

- ✦ [E. Lingle Craig Preservation Laboratory and Auxiliary Library Facility](#)
- ✦ [Lilly Library](#) (rare books and manuscripts behind the scenes tour)
- ✦ [Kinsey Institute Library](#)
- ✦ [IU Art Museum](#) (docent-led tour of the permanent collection)
- ✦ [Archives of Traditional Music](#)
- ✦ [IU School of Law Library](#)

For some tours, space is limited. Sign-up for tours may be indicated on your registration form or during on-site registration. Attendees will be assisted with directions to libraries and parking, but transportation is not provided. Information on locations of the individual libraries can be found on the [Map of the IUB Libraries](#)

6:30 pm: Dinner / Olcott Young Room

Friday, May 12, 2006

8:00-8:45 am: **Breakfast** / Bloomington Convention Center

8:45-9:30 am: **Concurrent Session E**

⊕ **Session E1: Metadata Design, Planning and Implementation for Digital Library Projects** / Bank One Rooms

The process required to create metadata records for digital collections, particularly non-textual digital collections, can be very different from that for traditional cataloging of print resources in a number of ways. These differences can have significant impact on workflows since the process can be much more heuristic and iterative than linear in nature. An overview of critical issues, followed by the steps (as developed by the presenter) involved in metadata design will be followed by a brief look at the planning and implementation phases. Topics covered will include evaluation of collections and legacy metadata, research and selection of best practices, element sets, content standards, value schemes, the importance of documenting local practice and the use of data dictionaries in planning and implementing projects. Critical decision points and issues related to interoperability will be highlighted.

Presenter: Jody Perkins (Miami University (Ohio))

⊕ **Session E2: Crossroads of Collection and Content** / Cook Group Rooms

Like almost every library in the country Steely library was staring at a bleak reality; recurring cost items were consuming 80% of the materials budget. To make matters worse, each year the price of recurring cost items was taking a greater percentage of the total materials budget. In 2005/06 Steely Library implemented a new plan for survival, the Information Broker Service. The presenters will show how Steely Library cancelled high cost/low use journals to fund the purchasing of articles and materials requested by the faculty, staff, and students of Northern Kentucky University.

Presenters: Lois Schultz and Sheri Myers (Northern Kentucky University)

⊕ **Session E3: The Feasibility/Viability of Electronic Books** /Olcott Young Room

Electronic books, while not as popular as electronic journals continue to be produced, marketed, and used with marginal popularity. Why is it that we see a strong public demand for electronic journals and a reluctance to use e-books? One reason that e-journals succeed is because they are often shorter and easier to print. Research on user preferences indicates mixed reactions to the use of e-books. Is it possible that the printed word is the best technology for monographic publications? Is the problem with e-books more complicated than simple nostalgia for the touch and feel of a book? Current research regarding the use of e-books has not been widely distributed. This presentation will review survey responses, reactions, and feelings toward e-books, along with some of the current research findings indicating that there may be more problems with e-books than meets the eye.

Presenter: Susan E Thomas (Indiana University South Bend)



9:45-10:30 am: Concurrent Session F

⊕ **Session F1: Using the Accelerated Improvement Process in Technical Services** / Bank One Rooms

The Accelerated Improvement Process (AIP), as presented by the University of Wisconsin-Madison Office of Quality Improvement, through workshops at IUPUI, is a structured approach which enables a group to quickly create or improve a process. IUPUI University Library used AIP initially, and successfully, to quickly implement a purchase-on-demand ILL process. The presenters will discuss the components of AIP and its recent use by teams in Cataloging, Acquisitions, and Digital Libraries to deal with processes such as a new workflow for PromptCat and shelf-ready books, electronic resources problem reporting and serials invoice payment.

Presenters: Ann O'Bryan and Robin Crumrin (Indiana University-Purdue University Indianapolis)

⊕ **Session F2: It's Got Numbering, But It Looks Like a Book: Some Factors to Ponder When Choosing Serial or Monographic Cataloging** / Cook Group Rooms

It's not too difficult to determine which items *could* be cataloged as serials. But *must* any individual volume that could be done as a serial end up on a serial record? What about duplicates? Strays? Special issues? Odds and ends? The decision should weigh patrons' information needs, treatment of previously received issues, the availability of bibliographic copy, language and subject expertise in tech services, LC's treatment decision, and the nature of the local collection. Ideally the choice involves input from both the selector and technical services; but if the selector is not available, or defers to tech services' judgment, it may be possible to identify some guidelines. This presentation will suggest some of the factors that might influence cataloging treatment.

Presenter: Christopher H. Walker (Pennsylvania State University)

⊕ **Session F3: Data Hunters, Gatherers and Deliverers: New Role of the Agent as Intermediary in the Drive for E-Access and Usage Data Standards** / Olcott Young Room

As neutral parties serving the subscription needs of libraries and publishers, agents provide a number of important services to support electronic media, many of which facilitate greater efficiency and improved access in the e-resource supply chain. As a result, agents possess essential information needed by libraries and publishers. Our program will look at how agents are uniquely positioned to form collaborations with libraries, publishers, and ILS vendors to drive standards and transparency that enable organizations to better evaluation collection needs and enhance access to e-resources.

We'll examine the creation of new standards for Electronic Resource Management (ERM) data, automatic retrieval of usage statistics, license information exchange, and automatic e-access registration. Our program will explore how COUNTER compliance standards and new partnerships with usage statistics aggregators are enabling organizations to more efficiently manage and evaluate usage statistics from multiple sources. In addition, we'll look at how agents are teaming up with ILS vendors and publishers to develop new Electronic Data Interchange (EDI) interfaces to reduce costs and generate greater efficiency

Presenter: Alison Roth (Swets Information Services)



10:30-10:45 am:

Break

10:45 am-12:00 pm:

Featured Speaker: The Future of Librarianship Holds Lots of Promise
/ Olcott Young Room

Don't let some of those pundits pull the wool over your eyes, because the future of libraries is bright. No, libraries of the future will not necessarily look like libraries of the past or present, but the fundamental characteristics of librarianship will remain relevant. All that is needed is a re-examination of traditional library processes and a re-learning to how to apply them to meet our dynamic technological environment and evolving user expectations.

Presenter: Eric Lease Morgan (University of Notre Dame)



End of Conference