

Ohio Valley Group of Technical Services Librarians  
**OVGTSL 2014 CONFERENCE**  
**NEWSLETTER**

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Athens, Ohio

*Photos by Tyler Stabile*



# Session Reports

slides and handouts from many presentations are available at  
<http://ovgtsl2014.wordpress.com/program/slides-and-handouts/>

## Keynote 1

*Gwen Evans, OhioLINK*

*Reported by Sharon A. Purtee*

Gwen Evans opened the 2014 meeting with her talk titled “The Value of Cooperation.” She began by describing OhioLINK as a cooperative of Ohio libraries (academic, public and K-12), powered by member participation. Collectively, it provides shared and direct services to 600,000 students, faculty and researchers through 20 million articles, 40,000 theses and dissertations, 81,000 e-books, and approximately 50 million library items.

The unique feature of OhioLINK is that funding is local, but resources and services are shared. The value of this arrangement is cost savings to the institutions and broader collection development across the state, as well as cost avoidance for faculty and students. Over the last decade, staff at OhioLINK estimated that, for example, the University of Akron had saved \$18 million, Bowling Green State University has saved \$22 million and Ashland University had saved \$7 million.

A recent survey of library staff and directors showed that they perceived OhioLINK’s central catalog and delivery service as its most valuable services. However, for users the growth area is digital content. In 2012, there were more than 60 million searches and approximately 30 million downloads for an average cost of \$1.23/use. For e-content, funding is centrally based with large deals negotiated for either the whole user base or for parts of the user base. OhioLINK is one of very few consortia that pool their money to buy access to shared content. Currently, about \$40 million is expended on shared content, with 91 libraries contributing over \$33 million and OhioLINK contributing over \$6 million. OhioLINK members which are charter universities contribute 66% of the budget, OhioLINK itself contributes 18%, independent colleges contribute 15%, and 2-year and technical colleges contribute 1%. Six primary vendors of electronic content account for 78% of the funds.

These funding models have served OhioLINK well, but may no longer be sustainable in the long-term. A next generation OhioLINK that capitalizes on new technology is worth a serious look. Evans mused about what that “Next-Gen OhioLINK” might look like:

- Not just shared materials, but shared space, workflows and staff.
- Expansion of the book depository system.
- Expansion of the shared print network across state lines.

- Multi-tenant systems: a single instance of software serving many customers. Each library may have ability to customize, but the software is maintained centrally and updates are made once for all users.

Issues that would need to be addressed in such a system include security of the data and applications. This is especially important for those installations that serve hospitals or children. An additional consideration is the way vendors package their suite of services and products and the flexibility of installations to parse those to individual needs.

One of OhioLINK's concerns in moving toward this new future is cost. The initial installations were state-funded; any changes would be the responsibility of the libraries. There is no best-practice or business model for sharing services and staffing costs across libraries. There is also the issue of scalability and performance as systems grow; transaction times are important.

Efficiency, sharing, creating better user experiences and making data and information quickly and easily available is OhioLINK's goal, and the value of continued and deepening cooperation is stunning. However, the challenges of getting there are striking.

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## **Expanding Access to Archival Collections through the Online Catalog**

*Jennifer N. Howard, Kentucky Historical Society*

*Reported by Miriam Intrator*

For this talk, Howard defined "archive" as including traditional manuscripts, rare books, oral histories, and genealogical sources. The projects described were intended primarily to increase genealogists' use of microfilm and vertical files.

Howard began by arguing that the catalog record constitutes the final step of processing an archival collection. She sees cataloging as a public service, in which the focus should be on *how* users actually search for and use collections. The experience of the Kentucky Historical Society (KHS, <http://history.ky.gov/research/genealogy/>), has been that "If you catalog it they will come."

KHS had two major issues it wanted to address. First, its archival collections were largely hidden; even though they were cataloged, it took users a lot of extra effort to find them. Second, there was little overlap between archival users and traditional library users, a division that was encouraged and exacerbated by separate reading rooms and staffs. In 2009, a new director merged the reading rooms and reference desks. Now, whoever is working reference does both traditional library and archival reference, and some processing and cataloging too. At about the same time as the reference merger, Ex-Libris Voyager released its Tomcat product, making new cataloging opportunities possible.

KHS users are academics, local historians, and genealogists. The latter were a primary target for the cataloging project as they tended to be traditional library users who did not use archival materials.

Microfilm cataloging was the first project undertaken by the merged department. KHS microfilm includes mostly county records recording births, marriages, deaths, wills, etc. These were not cataloged, although they did have print inventories. Now, 7,000 out of 10,000 are cataloged. Traditionally this type of microfilm would be cataloged into archival series (ex: marriage records, Jefferson County, years), but KHS asked, does this in fact work for users? Feeling that the answer was no, they decided instead to do reel-by-reel cataloging, adding copious notes defining terms and explaining concepts, subject headings, etc.

The second cataloging project tackled three sets of vertical files consisting of county and church history and records. These were housed in open stacks, but none had previously been cataloged. Staff identified and removed unique materials; published items were added either to the pamphlet or rare book collections, while manuscript and typescript materials were added to the relevant county archival collections. After careful cataloging, the next step was to make these records discoverable and accessible. KHS first created a County Search interface as most researchers search and browse by county. All KHS archival collections are indexed for the county search.

With the Alexander Family Collection, 74 cubic feet of materials dated from 1509 to the twentieth century, the question was how to process the collection and make it accessible to users. The solution was to organize the collection by generations. Catalog records were created for individual series with any available digital content in ContentDM linked via thumbnail through the MARC 856 field.

Another collection was the Stamper Genealogy Research Papers, comprising the working files of a professional genealogist and covering 375 years. Since the collection is made up of client files, most do not relate to one another, so again the question was, how to process and make it accessible? In this case KHS decided to catalog each folder/file based on the client's name. They created detailed summary notes including information such as names, county, and type of records in each file; and subject headings. Howard emphasized that such detail would not have been possible without dedicated interns and volunteers.

The Stamper Papers led KHS to create yet another new search mechanism, the Surname Search. This is how users, genealogists in particular, are accustomed to searching on sites like Ancestry.com. Both the Surname and County searches were created by simply making some basic visual tweaks to the Voyager catalog software's out-of-the-box subject heading search feature.

Another project was to create a Manuscripts Inventory. This began as a reference shifting project, expanded to make sure each manuscript collection had a finding aid and catalog record (in both the local catalog and WorldCat), correct information, a link to digital materials, and added headings. Published materials found in manuscript collections were cataloged separately with location given as within the manuscript collection. This inventory provides a successful example of "if you catalog it they will come," when a researcher found one of these items in the online catalog.

Howard concluded her presentation with a few thoughts about what's next for KHS. One issue is not having a circulation statistics system in place for archival materials. One solution under



discussion is to check out items to the reference desk or to a generic researcher in order to track usage. Another processing project currently underway is the Morgan Postcard Collection. The donor had organized the postcards alphabetically by city. The processing and cataloging plan is for city groups to become series level catalog records. There will be sub-groups for large cities. This is a collection that already gets a lot of use, so improving the records in the online catalog should only augment interest and usage.

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## **Working with Staff to Make Change a Positive Force — Formula for success: Revolution + Motivation = Transformation**

*Selina Wang, Oberlin College  
Reported by Kim Mullally*

Wang presented a general talk on her experience managing change as the Head of Cataloging and Metadata Services at Oberlin College. Wang has been a library professional since 1990 and joined Oberlin College three and a half years ago. Oberlin College has 3,000 students and an annual library collection development budget of \$2-3 million.

Before making any changes, Wang reviewed the responsibilities of her team and learned the workplace culture. She also observed each person's unique work habits and analyzed the department's workflows. It was important to understand why workflows existed and keep discussions on the topic of the work instead of the person.

Wang made changes to benefit the library and its users. These changes were supported with statistics. Workflow changes, such as decrease in turnaround time for rush orders, were accomplished by meeting with staff members, writing out the new procedure, revising it, and documenting it to ensure clear expectations. Now the department is saving operational costs by improving efficiency in paying invoices, decreasing cataloging backlog, improving rush order processing, and cataloging digital projects in-house.

Wang motivated her staff by keeping them up-to-date on changes and providing opportunities to learn. The staff received training to do new work, meet new cataloging standards and improve efficiency. After appropriate time to study and use the new skills, staff are responsible for using their knowledge to solve problems. Staff work independently and are responsible for collaborating when their actions impact other people. Wang and her staff also explain their work to public services staff.

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## **The Benefits of Centralized Project Management**

*Matthew E. Strauss, Ohio State University  
Reported by Debra Borrelli*

Strauss presented on the "hows and whys" of centralized project management. The structure of a project should be a temporary endeavor with a unique product which has a finite beginning and

end. In order to keep focus on the project, the centralized manager can track the progress of the project, inspire the participants throughout the project, and celebrate phase accomplishments.

Planning is essential to the success of a centralized project. Strauss defined the needed planning steps as: definition of the project, methodology, documentation, testing, training, monitoring, evaluation and completion. Two possible roadblocks to successful project management are indirect supervision of project staff, which may interfere with prioritization of project and regular work tasks, and "scope creep." The scope of a project is a balance of the duration, budget and quality for the project. Changing any one side of the balance or ballooning all sides of the balance can result in a project that never ends. Benefits for using the Centralized Project Management process are centralization of information, well-defined finite workflow, flexibility, variety, teamwork, and library cohesion.

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## **Meeting the Challenge in Managing Today's Library E-resources Discovery and Access**

*Sherab Chen, Ohio State University Libraries  
Reported by Mina Chercourt*

The Ohio State University Libraries has restructured its cataloging department and formed a new team to meet the challenges of managing and providing access to e-content. This new team is called the Collection Description and Access Department (CDAD). CDAD consists of the Head of the department, a Project Manager, an E-resources and Serials Librarian, a Western Languages and Authority Control Librarian, and a Non English Languages Librarian.

Chen's session focused on one project under the E-resources and Serials section of CDAD. The Acquisitions Department had purchased a vendor file of 17,138 records. When CDAD looked at the records, they saw the vendor record number in the MARC 001 field and the OCLC number in the 035 field. They wanted to swap these two fields. On top of that issue, 606 of the records were records for the print, rather than electronic, version of the item. CDAD found that OCLC Worldcat usually contained a suitable e-book record, but the vendor had used the print record rather than using the existing e-book record or creating a new e-book record. CDAD had two options: they could load the vendor records as is, or fix the incorrect records. They chose to fix the incorrect records.

CDAD performed a test load in order to discover the incorrect records, then extracted them from the file. After correcting those records, they could then reload all the records together. The tools used for this project included MarcEdit, the Innovative Interfaces Sierra Integrated Library System client, and Microsoft Word and Excel for creating lists. The original file was split into four files. This was in part because of size limits on files in Sierra, but it also made assessing their methodology much easier and was better for quality control. CDAD found that extracting the incorrect record was time consuming, but fixing the records was not difficult. Having already paid the vendor for these records before seeing them, CDAD paid the added expense of staff time. Nonetheless, in the long run, correcting the records was the better option as loading the incorrect records would not have been good for the user.

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## **Reimagining Digital Content on Ohio Memory: Beyond Search and Retrieval**

*Lily Birkhimer and Phil Sager, Ohio Historical Society*

*Reported by Kathryn Bacone*

Birkhimer and Sager gave helpful advice on how to improve access to digital content, reach new audiences, and increase user interaction. First was an overview of Ohio Memory, its mission to provide access to historical treasures, its inclusion in the Ohio Bicentennial Project, and its substantial content which includes over 295,000 items. The scope of Ohio Memory includes historically significant materials common to all Ohioans, and materials that are unique to a specific local community. One example is the Ohio digital newspaper collection.

To demonstrate how they've increased awareness, the presenters navigated the Ohio Memory website. The site's "Learning Resources" include historical quizzes, timelines, "Then and Now" maps, the Chronicling America project, featured topics, and a blog. One successful event to increase user interaction was Ohio Memory Madness: people were asked to vote for their favorite cultural object for a chance to win prizes. 6,500 people participated in the event's second year.

Birkhimer and Sager demonstrated how to use the "Then and Now" maps application to show off images, video and other media, and associated metadata, so people can see the amazing content in your digital collections. The presenters provided an information sheet with links and codes for this and other applications used for Ohio Memory (available on the Slides and Handouts page of the conference web site).

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## **3 x 3 : Three approaches to describing 3-D objects**

*Libby Hertenstein, Nancy Down, and Liz Tousey, Bowling Green State University*

*Reported by Valentine Muyumba*

Down, Hertenstein, and Tousey presented on the 3-D objects collected by the Browne Popular Culture Library (BPCL), Sound Recordings Archives, and Curriculum Resource Center at Bowling Green State University (BGSU).

Objects collected by the BPCL range from a Godzilla bank, to a squirrel puppet, to a Victrola record player. The librarians displayed several examples of BPCL realia, most notably the Maria Wakefield Star Trek Collection.

"More than just a home for compact discs and vinyl records, the Sound Recordings Archives also preserve a variety of sound recording and playback machines," including such examples as an Edison Home Phonograph (circa 1901), a morning glory horn and crane manufactured between 1904 and 1910, and a Sony Walkman cassette player circa 1989 or 1990.



The Curriculum Resource Center serves the College of Education, teachers, and local families, and collects a variety of items including toys and teaching kits.

Librarians at BGSU have found interesting way of storing, cataloging, and preserving 3-D objects. Some of the objects come to BGSU without their original packaging or instructions, making it difficult to catalog them without spending a lot of time researching the objects online. With no standard manuals or best practices, the librarians have had to rely on MARC 500 notes to describe each item, and apply Special Collections and Archives philosophy when cataloging. They use metadata standards to describe the objects.

A general rule is to be FLEXIBLE. At the Curriculum Resource Center, over 300 MARC 500 fields are used to describe teaching kits, making it possible to update the records when kits come back to the library with missing parts. At the Sound Recordings Archives, a "Historical Sound Equipment Input Form" aids in describing these historic objects.

At BPCL, items are sorted into categories like science fiction, fantasy, romance, mystery/crime, Disney, fast food, and pop culture icons. Librarians photograph the items in order to give the patron a better idea of what the item looks like, and store them in bins with photograph attached on the outside. They have also advertised the 3D-objects by creating a Youtube video: <https://www.youtube.com/watch?v=mJEICY6HrE4>. This helps make the rest of the campus aware of the rare objects found in the BPCL. The bibliographic records created by the catalogers also help collectors in the area identify their own personal collections.

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## **Streamlining Workflows: Transforming 20th Century Metadata Processes for 21st Century Access**

*Heather Fox, University of Louisville*

*Sarah Dorpinghaus, University of Kentucky*

*Heather Stone, Filson Historical Society*

*Reported by Stephanie Bricking*

Stone, Dorpinghaus and Fox all spoke about ways they streamlined workflows at their institutions to facilitate access to their collections. Each provided practical ways to improve workflow that many can implement at their own institutions.

Stone, from the Filson Historical Society, spoke about the process of streamlining training and workflows to clean up metadata for their migration to PastPerfect Online. The legacy metadata had several search limitations because previously there were few data entry standards and limited training for volunteers and staff. Several changes were made to make the workflow smoother, including the increase in PastPerfect licenses for staff members, which provided appropriate security settings and improved usage statistics. Stone also developed a searching cheat sheet and is in the process of creating a cataloging manual. Finally, staff are cleaning up

authority files within PastPerfect. By focusing on small changes, Filson staff have made their materials more discoverable and will save themselves time in the long run.

For Dorpinghaus at the University of Kentucky, automation is an important way to streamline workflows. When migrating digital objects and metadata to the Kentucky Digital Library, Dorpinghaus found that “programmers are friends” and were willing to help write code to increase efficiency in the archivists’ workflows. She also noted that one must continually assess workflows to find ways to increase efficiency. At UK, programmers developed two programs, Gossamer (which creates an empty directory structure based on EAD containers) and Abby Normal (which provides a test area for quality control). If there are no programmers at your institution, Dorpinghaus suggested talking to IT staff to find ways to make workflows automated, searching for existing tools, becoming your own programmer, and seeking help on listservs.

Fox, from the University of Louisville, used the Caufield & Shook Collection as an example of streamlining metadata workflow. Legacy documents, spreadsheets and databases created over the years were spread across different directories, and those working on the collection were located in different spaces of the library. Fox’s goals were to centralize metadata and find places where student workers could perform tasks. Using the command line interface, she exported file names from the image directory into an Excel spreadsheet which she used to create a master database of the collection. Fox also sought database help from the Office of Libraries Technology so student workers could record basic metadata during the scanning process. To streamline workflows, Fox says to identify inefficiencies, delegate tasks, learn tech tips, and ask the experts.

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## **Off-Road Authority Control**

*Chris Long, Indiana University*  
*Reported by Katherine Marschall*

Long, a cataloger at Indiana University (a PCC contributor), addressed the problems of creating authority records for personal names. He began by pointing out the classic justifications for authority control (browse list displays, correlation of information), but also addressed the effect that the newer discovery layers are having on searching the catalog. Discovery layers start with keyword searching, but they use facets to limit searches. Facets are pulled from the access points in bibliographic records, so when the headings are not correct, results are not correctly sorted into facets. As Long stated, “catalog sins are being brought to light.” Linking data requires accurate data.

Compounding the problems of authority control, the rules have changed! Undifferentiated headings for personal names, those catch all records for multiple people with the same name that we can’t distinguish from one another, are no longer acceptable. In addition to the traditional birth or death date, or fuller form of name, RDA also allows: period of activity, profession or occupation, other term of rank, honor, or office, and the ever popular “other designation.”

The first step Long recommends is deciding whether the person in question is alive or dead. A carefully worded email (try not to sound like a stalker!) directly to the author is often the most helpful approach. If you have information about where he or she works, look for an organizational website (they often list fuller forms of names). Social media, particularly LinkedIn, can be helpful. Often, we forget to follow our own advice: consult a librarian. Colleagues at other organizations can be good resources.

If the author is probably dead, Google can be helpful, but generally returns too much information. The Social Security Death Index (SSDI) is available online and has a name index to the deaths recorded by the SSI starting in 1962. Genealogy websites are also helpful. Familysearch.org and GenealogyBank.com are free, and your institution might have a subscription to the library edition of Ancestry.com. There is even a compendium of indexes: Online Searchable Death Indexes & Records ([www.deathindexes.com](http://www.deathindexes.com)) which list more searchable sites, some free, some not. Another creative way to look for information on dead authors is to look for tombstone transcription sites, such as Find A Grave ([www.findagrave.com](http://www.findagrave.com)), USGen Web Tombstone Transcription Project ([www.usgw-tombstones.org](http://www.usgw-tombstones.org)) or Internment.net ([www.internment.net](http://www.internment.net)).

In the question and answer session, these sites were recommended for music and video: Discogs ([www.discogs.com](http://www.discogs.com)) for music and IMDb for movies. We were also reminded to add all the information we could to the authority records, using 670 fields.

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## **Lavery's Collection Development: At the Corner of Library Wide Assessment and Value Added Services**

*Kate Ross and Micquel Little, St. John Fisher College  
Reported by Kathryn Bartelt*

The Purchase On Demand (POD) initiative at Lavery Library at St. John Fisher College is different from the typical POD system—an automated process based on specific criteria that triggers a purchase of material. This collection development tool, launched in 2009, evolved into a system of examining ILL requests to determine the most valuable action regarding a patron request for material—action that focuses on the best outcome for the user. In addition to this goal of outstanding service and satisfaction for users, incorporating assessment measures within the POD initiative is useful for developing Lavery Library's assessment plan with the ultimate goal of demonstrating how the Library adds value to a student's education.

Using GIST (Getting It System Toolkit) software with ILLiad allows retrieval of additional information from the library user requesting an Interlibrary Loan. Asking the user questions including "what will this resource be used for" and "what is your status" allows analysis of the request and more informed decisions regarding purchase or retrieval of the requested item. Communicating with all parties involved with the ILL transaction—students, faculty, library staff and liaison librarians— was an important element in the project.

Over a 16 month period, 2,171 ILL requests were submitted and analyzed. Using established criteria, approximately 55% (1,205) of the requests were borrowed, 29% (622) were purchased, and 16% (357) were cancelled.

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## **The Dilemma of Building Ebook Collections: Acquisition, Access, and Ambiguity**

*Lynda Fuller Clendenning, Indiana University*  
*Reported by Janet Nicholson*

Acquisition of electronic books has become a maze and matrix of choices. Various methods of ebook acquisition were discussed in this presentation, including patron-driven acquisition, publisher packages, subscription, and individual title selection. The presenter estimates that her library has over one million ebooks, and a major challenge for her department is title overlap. It's understandable why she discussed ambiguity. It's the state of not knowing all the paths a library user takes to access electronic materials, as well as not knowing which platform the ebook is located.

The presenter also discussed the challenges of accessing ebooks, including broken URLs, proxy issues, changes to IP addresses, and compatibility issues with network browsers. Some possible solutions presented by Clendenning to resolve the dilemmas of building ebook collections included platform and aggregate consolidation, expansion of staff and technology, and support for multiple user devices. Ebooks are here to stay and demand for them is increasing, so electronic resource acquisitions units must rise to the challenge of dealing with a volatile acquisitions environment.

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## **From Microfilm to Digital Images: The National Digital Newspaper Program**

*Jenni Salamon and Kevin Latta, Ohio Historical Society*  
*Reported by Carrie Preston*

Ohio History Connection (formerly known as the Ohio Historical Society) has been digitizing microfilm newspapers since 2008, working with the National Digital Newspaper Program (NDNP) and the Ohio Memory project. Managed by the Library of Congress, the NDNP combines content from state partners to produce the Chronicling America historic newspaper archive. NDNP standards attempt to promote high quality digitization and sustainable access.

Salamon and Latta offered tips for selecting content for digitization, including advantages and disadvantages of digitizing microfilm vs. print originals. Selection criteria used by Ohio History Connection include historical significance, geographic coverage, and chronological span. Technical specifications for image and metadata produced by the project were discussed, including standards for online character recognition (OCR). Metadata Encoding and Transmission Standard (METS) is the primary format used for structural and technical metadata at the reel and issue levels. CONSER-compliant MARC records are also produced. Microfilm

reels and digital images must be reviewed carefully before and after scanning to ensure completeness and accuracy of the images and metadata. Finally, advice on hosting of the final images was provided, with emphasis on the Chronicling America and Ohio Memory site hosting used by Ohio Historical Connection.

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## **Collaborative Troubleshooting of Electronic Resources with Public Services Staff: Two Heads Are Better Than One**

*Karen Reiman-Sendi and Judith Ahronheim, University of Michigan  
Reported by Debra Borrelli*

Ahronheim and Reiman-Sendi presented a discussion of their library' schema for managing electronic resource access problems. They use a Customer Response Manager (CRM) product, *Footprints*, to receive, initiate, route, track and manage problem tickets and/or reports. With an average of 190 Summon (discovery layer) and 104 Technical Services problem reports generated per month, the different skills of staff bring better results for their users. Good record keeping and regular communication are critical for the success of the collaboration. The University of Michigan Library web site includes a Library Outages kiosk where unexpected problems and planned maintenance reports are posted for the public and staff.

Public Services staff initially troubleshoot problems by replicating the incident, determining the patron affiliation and checking the patron's library account, and checking the Library Outages kiosk for computer/Internet issues. Public Services staff then have the opportunity to refer the patron to other e-resources or invite them to visit the library for consultation and alternative sources, which provides teachable moments in the public interaction. Technical Services staff troubleshoot the problem by reproducing the problem, reviewing error messages, responding to the problem reporter, pushing a notice to the Outages kiosk, identifying the cause, and contacting responsible partie(s) for corrections. Once a problem is reported corrected or "closed," Technical Services staff follow up to be sure the problem is not reproduced and report to both the original reporter as well as the Outages kiosk. Persistence, good communication skills and the ability to explain technical issues in non-technical terms go a long way in the success of electronic resources management.

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## **Using CONTENTdm for Archives Administration: A Case Study**

*Rhonda Rinehart and Jodi Kearns, University of Akron  
Reported by Janet Carleton*

Rinehart and Kearns discussed their work at their institution, the Center for the History of Psychology (<http://www.uakron.edu/chp/>), and how they leveraged their CONTENTdm install to serve as their catalog and behind-the-scenes collection management tool in addition to displaying digital collections.

Historically, assets were entered into a paper card catalog. In the 1990s the card catalog was converted into a database using too few fields and no controlled vocabulary. The archives and museum at the Center for the History of Psychology are not part of a library, so they were unable to piggyback on an integrated library system, and had to seek other options. In the 2000s, along came an institutional site license for CONTENTdm which the CHP used and continues to use in the traditional manner of showcasing unique digital collections.

However, as dissatisfaction grew with the inadequate 1990s database, staff had the idea to try using CONTENTdm as a collections management system. They created non-public collections by format, such as artifacts (934 records), books (8,884 records), and moving images (4,057 records); and added item records. Additionally, the list of “collections” includes the accession log, projects, invoices, and such.

Staff from across the CHP can search and update their work, all in the same accessible database. A collection record contains fields for tracking projects and workflows--date received, acknowledged, number of boxes, donor information, deed of gift, priority for processing, and more. An unusual implementation, but one that suits the purposes of using one available tool, familiar, already paid for, and installed.

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## Keynote 2

*Ben Hunter, University of Idaho Library  
Reported by Kate Seago*

Ben Hunter, Head of Cataloging and Collections at the University of Idaho Library, presented the Friday morning keynote. His address, which focuses on defining what “technical services” does, was a good counterpoint to Gwen Evans’ data driven presentation on the value of collaboration for libraries. Mr. Hunter moved us from data and daily operations to a look at the underlying values and philosophy that drives what technical services is and should be in the future.

Hunter pointed out that when asked, technical services librarians tend to define themselves by what they do (such as acquisitions, cataloging, and preservation). The *Encyclopedia of Library and Information Science* defines technical services by its functions, and in opposition to public services. However, these definitions overlook the important question of why we do what we do. Furthermore, if we define ourselves solely by function, what happens when those functions disappear or change significantly? Using Ranganathan’s five laws of library science, the “why” of technical services becomes clear in helping the user find what he needs.

Hunter then moved from defining technical services to discussing futurists and various ways to plan for possible futures. One method, scenario planning, takes two variables and considers them in a grid pattern. This was the methodology the American Research Libraries used in their report looking at research expertise and individual research as the variables. This resulted in scenarios such as scarce research resources making researchers disinclined to share; or an



abundance of research and individual researchers free to make use of the research, resulting in collaboration.

Next he returned to the problem of defining ourselves by functions rather than focusing on why we do what we do and what skills and knowledge we bring to the table. By focusing on why rather than what, technical services librarians can face the challenges presented in the ARL scenarios and current trends on campus. Our expertise lies in behind the scenes activities and functions that are complementary and occasionally overlap with public service, but meet the same goal of helping the user find what he needs. Furthermore, the skills and specialized knowledge found in technical services are particularly applicable to digital age, when good metadata and authority control are necessary for successful searching by users. He followed up with some examples where technical services staff were able to repurpose their skills to help with digital scholarship or data management projects.

In conclusion, Mr. Hunter challenged the audience not to let themselves be defined by narrow functions, but instead to think broadly and strategically about how to apply the skills and knowledge of technical services staff to meet the challenges facing the libraries now and in the future.

After the presentation, Mr. Hunter took questions from the audience covering his thoughts on music cataloging under the new RDA rules and accommodating discovery tools, and about what his experience with the cross institution collaboration on cataloging was so far.

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## **Copy-Cataloging Made (Even) Easier**

*Richard Wisneski, Case Western Reserve University  
Reported by Libby Hertenstein*

This presentation was intended for those who perform or supervise copy cataloging. Wisneski presented a workflow for copy catalogers and student employees that relies on Excel spreadsheets and the Create Lists function within Innovative Interfaces' Millennium ILS to review and catalog mostly monographic material. This process would be most useful to Innovative ILS-using institutions who are not able to customize their load profiles. This process allows employees to catalog a set of 25 books in one hour.

The workflow involves running three lists on materials that are purchased from vendors. These lists are for item records, order records, and bibliographic records. Once the lists are made, data are exported into an Excel spreadsheet for review. Copy catalogers and student employees review the data and look for missing call numbers, location errors or special notes, for example special processing requests. If these errors or notes are found, student employees flag the items for professional attention. Paraprofessionals are also utilized to fix the errors or address the notes.

Following the review process, the workflow uses Millennium's Global Update function to make changes to the records in the three Excel lists. Previously, Case Western used the Rapid Update function for this, but Global Update is preferred because it allows a preview of changes before actually updating the records.

The first list to be changed with Global Update is the order record list. The receiving date is added to these records and the record status is changed from ordered to purchased. The listed bibliographic records are then updated to include a cataloging date and a MARC 951 field which includes a 4 digit year, 2 digit month, and first name of cataloger. This information is valuable because it allows for future statistics gathering. The final Global Update occurs to the records in the item record list, when workers change the status of the items from "in processing" to "check shelves." The suppression fixed field is also changed to display the item in Case's public access catalog and in OhioLINK's central catalog.

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## **No Longer Hidden: Creating Access To Special Collections**

*Nancy Richey and Amanda Drost, Western Kentucky University  
Reported by Julene Jones*

Richey and Drost discussed their collaboration around the cataloging and processing of a portion of the hidden collections housed in Special Collections at Western Kentucky University. These hidden collections included folklife interviews, manuscripts, photographs, posters, oversized political signs, family archives and various other ephemera, much stored in boxes, untouched and unsorted for decades. Throughout this project, both Richey and Drost focused on identifying and prioritizing materials for cataloging that were unique or of local importance in their collection, which is used primarily by genealogists. These collections have been inaccessible to scholars and "it must be our aim to provide sufficient physical and intellectual access to them," stated Richey, citing the frequent distinctions made between preservation and access: as two separate competing processes (preservation versus access), as the same process (preservation as access), or as two means to an end (preservation and access).

Drost described the processing and cataloging workflows developed for this project, including the creation of policies surrounding the processing of the materials and a collection development policy, particularly for the retention of duplicates. The backlog included multiple duplicate copies of some items and it was decided that no more than two copies of any item would be retained unless the item was of particular significance in local history, or to the collection as a whole. Drost is in the process of creating a wiki-based manual for cataloging material from Special Collections including instructions, policies, emails and detailed minutes of the meetings held during this project.

By creating access through cataloging and providing digital access to materials or finding aids in PastPerfect, scholars have already reaped the benefits of these two librarians' efforts. They report that the digital asset management system PastPerfect was chosen over CONTENTdm by Western Kentucky University because of its lower cost and ease of use by library staff. Richey

has written an article evaluating PastPerfect which will be published in the July issue of *Computers in Libraries*.

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## **Lightning Rounds**

### **Publishing Cross-Platform E-Books With Open Source Tools**

*Elias Tzoc and Jason Paul Michel, Miami University*

### **Unexpected directions: Moving from Dublin Core to MARC**

*Natalie Bulick, Indiana State University*

*Reported by Carrie Preston*

Tzoc and Michel reported on the production of open access e-books by Miami University Libraries Center for Digital Scholarship. Creation of e-books involved combining files in both written word and variety of multimedia formats to produce end products in two popular e-book formats, ePUB and MOBI. The presenters demonstrated the creation of an ebook from existing digital files using Calibre e-book management software, and noted several potential pitfalls in the process.

Bulick reported on her experience in moving from Dublin CORE metadata production to MARC cataloging. Resources she utilized include the OVGTSL 2013 pre-conference on RDA cataloging; cataloging literature and listservs; and project-based learning, particularly a project to transform electronic thesis and dissertation metadata from Dublin CORE to MARC format. Her library's adoption of RDA cataloging, which necessitated library-wide policy examination, helped her get immersed in MARC cataloging in order to gain practical experience. Bulick gave examples of undesirable results that can arise when using OCLC's WorldCat Digital Collection Gateway to translate data, as well as instances where lack of local staff training or policy consistency led to later difficulties in metadata processing.

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## **Tech Services Outreach?**

*Alexander Papson, University of Notre Dame*

*Reported by Robin A. Buser*

The University of Notre Dame Hesburgh Libraries has created a Center for Digital Scholarship (CDS). A wide range of software and hardware are available to assist researchers with digital projects. The CDS staff members are a combination of librarians, a Council on Library and Information Resources Postdoctoral Fellow, and staff from other centers around the University. Staff provide workshops on digital topics such as metadata creation, Geographic Information Systems, and data mining and analysis. Staff also provide personal consultations with researchers. Workshops pertaining to copyright are being planned.

The presentation included details on the physical space, the software and hardware available to researchers, and on the development of the workshops. In its six months of existence, the Center has proven to be a valuable tool for the university. The workshops have been attended by faculty, graduate students, undergraduate students, and researchers not connected with the university. The CDS strives to teach researchers to create metadata, rather than doing it for them. The CDS is beginning to bring researchers from different parts of the University together when they are working on similar projects.

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## **Dead Links? No Problem. We're In This Together.**

*Kathryn Lybarger, University of Kentucky  
Reported by Patricia Guardiola*

Lybarger, Head of Cataloging and Metadata at the University of Kentucky's Young Library, presented on challenges of, and solutions for, dead ebook links in a library's catalog. Lybarger began by contrasting the process of preserving print materials with today's challenges of preserving digital materials, specifically ebooks. She referenced Terry Sanders' concept of the "slow fire" in relation to the slow decay of print books. With print collections, we can scan a static, physically accessible collection for problems such as broken bindings and brittle pages (by administering the double fold test). In preserving print materials, we have the option of deacidifying the document, replacing it, or even digitizing it. We might also have copies stored elsewhere, meaning that patrons can still access the book when another copy is out for preservation.

Ebooks, as Lybarger emphasized, present a different set of challenges than physical books, particularly regarding the accessibility of an item online. With ebooks, it is the responsibility of the vendor to maintain working links for the items. Ebooks are unique in that titles can be fluid: some titles can be swapped for others, titles can be updated with new editions, and links can be discontinued by the vendor (sometimes without the library's knowledge). The corresponding URL for an ebook can be migrated to a new platform, or it can be incorrectly structured, necessitating error corrections of the URL's syntax. So, an ebook is a special case in that its preservation depends on its active link and current license, which in turn provides the patron with access through the library catalog.

When an ebook no longer has an active link through the catalog - whether due to a bad URL, an expired license, discontinuation of the title, etc. - Lybarger referred to the resulting loss of access as a "zombie link" or a "dead ebook." Sometimes a vendor will notify the library in advance that a certain link will become a zombie link and will provide a new link. Other options for finding zombie links in a library's catalog include vendor reports on discontinuations; lists on the vendor's web site; investigating IP addresses; and checking links manually. Lybarger's advice included modifying the 856 field in the ebook's OCLC record, and distinguishing DOIs and permanent URLs as the most fixable types of links. Lybarger presented several tumblr sites that she created. She also asked the audience for advice on sharing information on zombie ebooks. Some responses included creating a Google Doc that could be shared and posted to the tumblr

site below; subscribing to an RSS feed of updates to the tumblr site; and creating social media hubs such as a Facebook group or Twitter feed, or a listserv.

- Kathryn Lybarger's page on "z-books:" <http://zombie-ebooks.tumblr.com/>
- Helpful macros: <https://github.com/zemkat/voyager>
- Other cataloging information by Lybarger: <http://problem-cataloger.tumblr.com/> and <http://library-computer.tumblr.com/>

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## Teaching a New Dog New Tricks: Reflexivity and the Digital Repository Paradigm

*James Bradley, Ball State University  
Reported by Janice Gustaferra*

In his decade of work with Ball State University's Digital Media Repository (DMR) (<http://libx.bsu.edu/>), Bradley has noted some interesting changes in the way that digital collections are accessed and used. Several years ago he noticed that instead of going directly to a digital repository homepage, which can be seen as entering by the "front door," people tended to find items in digital collections through search engines and social media sites - the "back door." Regardless of how the public got to the digital content, however, the approach to and use of the digital content and associated metadata was primarily linear. Recently, though, Bradley has seen a more circular trend, with digital content and metadata being reused for new purposes. He and his colleagues have taken advantage of this insight by continually asking the question "how can we push this further?" in order to add value to the digital collections. Attendees at this session were fascinated by the results of this work.

Bradley originally found examples of reuse in student work. For example, art students viewed examples of past student work, which is exhibited in the DMR, prior to creating their own pieces for a similar assignment. One example of a digital initiative going a step further is the Ball State Digital History Portal (<http://cms.bsu.edu/academics/libraries/collectionsanddept/archives/collections/digitalinitiatives/bsudigitalhistoryportal>), which includes new student work referencing digital copies of primary source materials. The What Middletown Read project (<http://www.bsu.edu/libraries/wmr/index.php>) could have been limited to a digital collection of accession and circulation records from Muncie Public Library from 1891-1902, but with the addition of Census data and city and county records from that time period it has become a tool for sociological study. Another fascinating example is the Indiana Architecture X 3D project (<http://libx.bsu.edu/cdm/landingpage/collection/IndArch3D>). In this case, Bradley learned that architecture students were taking advantage of a collection of digitized architectural drawings by creating digital 3D models of items detailed in the drawings. The digital initiative team took this a step further by not only adding these 3D models to a digital collection but also by including downloadable files for 3D printing. Plans are in the works to use 3D scanning of artworks in the David Owsley Museum of Art at Ball State to create 3D printing files and to create K-12 lesson plans to accompany these 3D models and printing files. The projects and ideas covered in this session inspired attendees to take a new look at digital collections.





# **Business Meeting Report**

*Reported by Natalie Bulick, Secretary*

May 29, 2014

Ohio University Inn and Conference Center, Athens, Ohio

The meeting was called to order at approximately 12:15 PM by Carrie Preston, Chair.

## **Introductions and Recognitions**

Carrie Preston introduced the 2013/14 officers:

Chair: Carrie Preston, Ohio University

Secretary: Natalie Bulick, Indiana State University

Treasurer: Michael Farmer, Ohio University

Past Chair: Dianne Grayson, University of Southern Indiana

Carrie Preston recognized the 2014 conference Planning Committee, Program Committee, scholarship recipients, and sponsors. Scholarship recipients were:

Peggy Griesinger, student at Indiana University

Patricia Guardiola, student at University of Kentucky

Jennifer Seymour, student at Kent State University

A motion to approve the 2013 business meeting minutes was made and affirmed by the membership.

## **Treasurer's Report**

The treasurer, Michael Farmer, summarized the report distributed to the membership.

Incoming balance August 31, 2013: \$13,466.95

Income received: \$17,420.17

Balance, May 23, 2014: \$28,676.70

Expenses as of May 23, 2014: \$2240.42

Total projected expenses: \$17,336.97

## **Old Business**

Change to OVGTSL Bylaws recommended by OVGTSL Web Site Task Force:

### **Article IV, Section H (replaces Article VI, Section C)**

Section H.1 A Webmaster shall be elected for a three year term from the membership.

The Webmaster will establish and maintain the OVGTSL web site, consisting of a brief history of the organization, a list of the current officers, and other appropriate information.

The web site will be hosted independently of any member institution and financed by OVGTSLS. The Webmaster may appoint additional individuals and/or groups to assist in maintaining the web site as necessary.

Section H.2 Information pertaining to the spring meeting will be incorporated into the OVGTSLS web site. The Webmaster will supply login information and basic assistance to member(s) of the Planning Committee appointed by the Vice Chairperson (Chair Elect), who will take primary responsibility for creating and maintaining meeting related content.

#### **Article VI, Section C**

~~A website shall be maintained for the Ohio Valley Group of Technical Services Librarians. The website will contain a brief history of the organization, a list of the current officers, a link to the current annual meeting information, and other appropriate links. It will be the responsibility of the annual meeting host site to maintain a website at their institution for current annual meeting information and to provide the URL to the website contact for a link to be added to the organization website.~~

This amendment was passed by a vote of over 2/3 of members present at the business meeting.

Joan Milligan, University of Dayton, was nominated for the new position of Webmaster. A call for additional nominations from the floor was made, but none were received. Milligan's nomination was approved by the members present.

#### **New Business**

Carrie Preston proposed the following slate of officers for 2014/15:

Chairperson: Carrie Preston, Ohio University  
Vice-Chair (Chairperson-Elect): Natalie Bulick, Indiana State University  
Secretary: Diana Reid, University of Louisville  
Treasurer: Heather Rayl, Indiana State University  
Archivist: Kathryn Lybarger, University of Kentucky

The slate was approved by the members present.

#### **Announcements and Adjournment**

Natalie Bulick announced the OVGTSLS 2015 Conference, to take place May 18-20, 2015 in Terre Haute, Indiana.

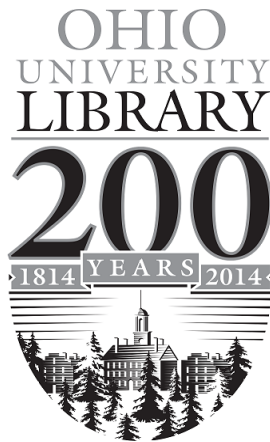
Door prizes were distributed and the meeting was adjourned at 1:15 PM.



# OVGTSL 2014 Conference Sponsors

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\$1000 and Above



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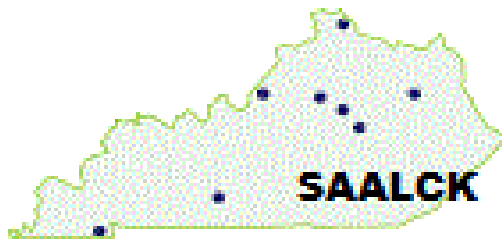
To \$500



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Gifts and Door Prizes

