

September 15, 1999

MEMORANDUM

TO: LRC Directors
Community College System

FROM: Pamela B. Doyle
Library Resources

SUBJECT: Changes in Technical Services Procedures

As we begin a new fiscal year, Library Resources is making some changes in the Technical Services procedures. These changes will minimize the work required of the colleges when ordering library materials and make the cleanup of the Data Automation Center (DAC) database an integral part of the cataloging procedures. These changes will also move us closer to accomplishing other goals that will enhance services provided to the libraries.

Changes Affecting DAC Libraries

College Procedures:

1. DAC libraries that have been sending purchase requisitions to Library Resources for ordering, receiving, and cataloging will no longer do pre-order searching on the DAC.
2. DAC libraries that have been placing their own orders and having the materials shipped to Library Resources for receiving and cataloging will no longer do pre-order searching on the DAC.
3. DAC libraries that have been placing their own orders, receiving the materials from the vendors, but requesting cataloging information from Library Resources **will still be required to do pre-order searching.**
4. Materials being ordered do not have to be separated into DAC and non-DAC batches and ordered on separate requisitions. They may be combined on one purchase requisition.
5. DAC libraries that have been using the acquisitions module may continue and will continue to have responsibility for entering the data.

Library Resources Procedures:

6. Library Resources will catalog materials using the following bibliographic sources, listed in priority order: DAC, Library of Congress, and OCLC.
7. Materials received from colleges or vendors will first be searched in the DAC. If an acceptable bibliographic record is found, a default holdings record will be attached. If

it is not found, the title will be searched in the Library of Congress database, then OCLC. If an acceptable record is found, it will be exported to the DAC and a default holdings record attached. If it is not found, an original will be entered in OCLC and exported to the DAC.

8. During the search process, if duplicate records for an item are found, the cataloger will review each record, decide which record to retain, then merge the records and holdings onto the remaining record.
9. Labelsets will be provided, but they will be printed from the DAC rather than OCLC.
10. Since the DAC database will be the primary source for cataloging information, we can no longer provide a shelflist card. Libraries requiring a shelflist card may use the pocket or circulation card label that is provided and attach it to a 3x5 card.
11. Materials will be shipped to the libraries as soon as cataloging is completed. They will no longer be delayed while waiting for the shelflist card to arrive from OCLC.
12. Accession/packing lists will still be provided for materials shipped to the libraries.
13. Slips received from DAC libraries will be searched using the same priority: DAC, Library of Congress, and OCLC.

Changes Affecting Libraries Not Using the DAC

1. Libraries may continue to order materials using the same procedures as previously.
2. Library Resources will continue to catalog materials, including Slips, using OCLC as the primary bibliographic source.
3. Labelsets will be provided and printed from OCLC.
4. A shelflist card will not be provided. Libraries requiring a shelflist card may use the pocket or circulation card label that is provided and attach it to a 3x5 card.
5. Materials will be shipped to the libraries as soon as cataloging is completed. They will no longer be delayed while waiting for the shelflist card to arrive from OCLC.
6. Accession/packing lists will be provided for materials shipped to the libraries.
7. Procedures are being discussed to export bibliographic records from the DAC database to disk, so libraries with local systems can download them into their catalog.

REASONS FOR THE CHANGES

To enhance the quality of the DAC union database. From the establishment of the DAC, the goal has been to have one bibliographic record for each format and edition of a title. When the databases of the 40 participating libraries were uploaded into the DAC, match points were defined that we believed would eliminate most duplication that could be detected by “machines”. Unfortunately, the libraries had used a variety of vendors to convert their manual card catalogs to machine readable format thereby creating multiple records for the same edition and format. A second process was run to eliminate duplicate records from the same vendors. Both processes were successful but did not eliminate all the duplication. Humans must review the remaining duplicate records. The merging of duplicate records will become a part of the daily cataloging tasks completed at Library Resources as a part of the cataloging procedures.

To reduce the paperwork required to purchase materials. When the DAC was first implemented, the DAC colleges were asked to do pre-order searching of all materials purchased to eliminate duplication of bibliographic records. As a result of pre-order searching, materials that already had a record in the database were to be ordered and shipped directly to the college. Not only did the college have to handle all work related to the ordering, but they also had to make arrangements to get labelsets, accession

records, and associated supplies. Materials not in the DAC could be ordered through Library Resources and cataloged.

Colleges will no longer have to separate orders by what is in the DAC and what is not. Orders can be combined on one requisition. The hardware and software needed for Library Resources to resume searching the DAC and merging duplicate records is now in place. Library Resources has already begun searching the DAC database as the first step in cataloging any item.

To enable us to provide other services. By using the DAC as our primary source of bibliographic records, we are using records that have already been acquired from OCLC and several retrospective conversion vendors. Library Resources will be able to reduce the ongoing costs associated with OCLC cataloging. These costs will not be eliminated because OCLC will continue to be used for cataloging materials for all colleges not currently using the DAC and for searching and exporting bibliographic records to the DAC database.

Any cost savings realized through the reduction in OCLC costs will be used to pay ongoing costs associated with the monthly uploading of bibliographic data from the DAC to the North Carolina Union Catalog (NCUC). Since 1985, all the bibliographic data entered into OCLC by Library Resources has been uploaded to the NCUC, so it would be available to all OCLC member libraries through the interlibrary loan subsystem. Bibliographic data generated through retrospective conversion projects had never been entered into OCLC. In recent months, Library Resources has been involved in a project to update the NCUC by uploading all the MARC bibliographic data from the DAC into the NCUC. Procedures are being developed to upload to OCLC on a monthly bases all MARC bibliographic data and holdings data added to or deleted from the DAC. The monthly uploads should keep the bibliographic data for each college current in OCLC.

For libraries that are not part of the CCLINC cooperative, Library Resources will continue to have your bibliographic data uploaded monthly from OCLC into the NCUG. However, you are encouraged to submit proposals to the State Library for Library Services and Technology Act (LSTA) grants to upload bibliographic data from your local systems and to develop ongoing monthly dataloads of additions and deletions.

The new procedures described above are already in place, so you should soon be receiving materials cataloged using the new procedures. If you have questions or concerns about these changes, please contact me at doylep@ncccs.cc.nc.us or (919) 733-7051 ext. 635.

cc: Presidents

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