Collaboration Can Make a Dream Come True: The “Magnificent 7” builds a single depository catalog

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- Kelly L. Shook/Kent State University
- Judith A. Scalf/NE OH Regional Library Depository
Collaboration Can Make a Dream Come True: The “Magnificent 7” builds a single depository catalog.

- Introduction
- NE Ohio Pilot Project-Summit-June 10, 2010
- NE Ohio Depository
- NW Ohio Depository
- SW Ohio Depository-Elite 8
- OHDEP -2 years later
- Questions
Collaboration Can Make a Dream Come True

- NWORBD 1997
  Perrysburg

- CEOD 1995
  Columbus

- SWORD 1994
  Middletown

- NEORD 1994
  Rootstown

- SEORD 1996
  Athens
Representatives from each depositing library and other interested parties met.

Two distinct, cooperative projects were authorized.

- Implementation of a shared catalog at the Northeast Ohio Regional Depository.
- A collective de-duplication project with reference serials.
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Under the leadership of Kent State University Libraries, the initial phase of the Ohio Depository shared catalog (OHDEP) was initiated by loading the holdings of the 5 contributing libraries in Northeast Ohio.
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Implementation Philosophies.
- Use of working committees.
  - NE Ohio Depository Implementation Coordinator - Kelly L. Shook.
  - Kent State University Libraries Systems department.
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Implementation Philosophies.
- NE OHDEP Implementation Working Committees
  - Initial and Ongoing Load – Mike Kreyche
  - Circulation and ILL – Cindy Kristof
  - Database Clean-up – Anita Martin and Dianne Centa
  - NE Regional Depository Working Group
Kent State University Libraries Staff Involved with the NE Ohio Depository Project

Tom Klingler
Mike Kreyche
Dave Gaj
Rick Wiggins
Cindy Kristof
Anita Martin
Dianne Centa
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Implementation Philosophies.
  - Use of uniform practices and procedures documentorm
  - Access to local and central catalogs for patrons would not be degraded.
  - OHDEP records would reflect ownership of contributing library.
    - Ohio Depository Northeast: Kent State University v.1 1913 Available
    - Ohio Depository Northwest: University of Toledo v.1 1913 Available
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Implementation Philosophies.
  - Use of OhioLINK policies as the basis for OHDEP system implementation
  - Ability to exclude records from being contributed to the OHDEP System
    - Government Documents – 88,309 items
    - Special Collections – 4,282 items
    - Materials identified by selectors and or faculty – 29,603 items
    - Determined the order of the implementation of each institution on the OHDEP system
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Implementation Processes.
  - Development of the implementation steps for each institution.
  - Development of an implementation timeline.
    - NE Implementation Timeline
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Implementation Processes.
  - Identified and resolved unique issues with each institution's implementation.
    - Each institution had its unique set of problems and issues.
    - Each institution’s implementation was a learning experience.
  - Document the implementation.
    - PBWiki
Implementation of Shared Catalog at the NE Ohio Regional Depository

Implementation Philosophies

- Communicate the OHDEP project to others
  - NE Ohio Regional Depository Report
    - NE Report
    - Appendix A
    - Appendix B
  - Article was published by Kay Downey, in a special issue of Collection Management, v. 37 no. 3/4 (July 2012)
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Institution’s Initial Record Contributions to the OHDEP system
  - Kent State University
    - 95,790 Bibliographic Records
    - 312,486 Item Records
  - Northeast Ohio Medical University
    - 29,979 Bibliographic Records
    - 90,725 Item Records
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Cleveland State University
  - 20,932 Bibliographic Records
  - 121,697 Item Records

- Youngstown State University
  - 40,325 Bibliographic Records
  - 118,337 Item Records
Implementation of Shared Catalog at the NE Ohio Regional Depository

- University of Akron
  - 261,604 Bibliographic Records
  - 405,323 Item Records

- Northeast Regional Depository - Total
  - 448,630 Bibliographic Records
  - 1,048,568 Item Records
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Outstanding issues, policies and procedures
  - Throughout the project issues, policies and procedures were identified in the following ways:
    - Through the various committees
    - During clean up and preparation of local systems data
Implementation of Shared Catalog at the NE Ohio Regional Depository

- After initial loading of each institution’s data into the OHDEP system
- After ongoing loading of each institution’s data into the OHDEP system
- Reality of additional depositories wanting to come on the OHDEP system that was initially created with few policies in place
Implementation of Shared Catalog at the NE Ohio Regional Depository

- Issues, policies and procedures were broken down by categories
  - Catalog Database Maintenance
  - Circulation and Interlibrary Loan
  - System and Administration
- Committees were formed by OhioLINK Administration
  - NE Ohio Depository Catalog Database Maintenance Working Group – Jeff Trimble, Chair, Youngstown State University
NE OH Regional Library Depository
NE OH Regional Library Depository

- Service Improvements
  - Direct service.
  - Function as our own Interlibrary Loan Department.
  - Illiad and DOCLINE implementation.
  - Response straight to requester.
NE OH Regional Library Depository

_workflow Changes_
- Circulation
- Cataloging
- De-duping
NE OH Regional Library Depository

- Workflow Changes- Circulation
  - Login to one – not five catalogs.
  - Time management – now at our discretion.
  - Statistical tracking: one place, one catalog.
  - From 15 staging groups – two staging groups.
Circulation - Pulling Requests

Circulation – Separating Requests
After – One catalog checkout
After – One catalog for Scanning
Circulation – Statistics

- Total Req.: Increase of 2,113
- Books Increase: Increase of 239
- Scans Decrease: Decrease of 1,874
NE OH Regional Library Depository

❖ Cataloging Efficiencies

- One catalog – not five
- Standard processes and procedures
  - Accessioning
  - De-Accessioning
  - De-Duping
NE OH Regional Library Depository

- Cataloging Efficiencies - Accessioning
  - Login into single catalog
  - Tray next available appropriate size match
  - Continuously fill trays, shelves, and ranges
Cataloging Efficiencies - Accessioning
Cataloging Efficiencies De-Accessioning

- Single summary record
- Update, delete multiple items from various schools in one place
Cataloging Efficiencies - De-Duping

- Easier comparison of holdings
- Easier identification of keepers – non-circulating and circulating
- Transfer of volumes between facilities expedited
- Statistical tracking
NE OH Regional Library Depository

- Efficiencies for Contributing Libraries
  - Checking for duplicates before processing for Depository
  - Elimination of time for shared de-duping spreadsheet
  - Collation of possibly 13 library holdings reduced to one summary record
NW Ohio Regional Book Depository
NW Ohio Regional Book Depository

- Record loading
  - The University of Toledo
    - 192,000 Bibliographic Records
    - 398,163 Item Records
  - Bowling Green State University
    - 396,277 Bibliographic Records for
    - 700,769 Item Records
  - Northwest Depository OHDEP-TOTAL
    - 588,277 Bibliographic Records
    - 1,802,921 Item Records
NW Ohio Regional Book Depository

- Efficiencies Realized
  - Simplified depository workflow for UT, BGSU and NWDepository
  - All institutions standardized how we handled material
    - Icode2: s no loc no cent
    - Items now get a removable label so when Depositary Staff handle an item for accession they know what to do with it:

  Removable ID Labels
  Use Avery® TEMPLATE 5160®

  www.avery.com
  1-800-GO-AVERY

  BG Depository
  Location _________
  Status _________
SW Ohio Regional Book Depository
SW Ohio Regional Book Depository

Wright State University – OHDEP Implementation

Timeline:

- **March and April 2012**
  - Database Preparation and Cleanup
  - Suppress/De-Contribute Local Records from OhioLINK
- **May 2012**
  - Load Records into the OHDEP system
- **June 2012**
  - Test Circulation System
  - Uns suppress/Contribute OHDEP Records to OhioLINK
- **August 2012**
  - Cleanup and Ongoing Load Procedures
SW Ohio Regional Book Depository

- Record loading
  - Wright State University
    - 221,230 Bibliographic Records
    - 434,475 Item Records

- Wright State University Goal
  - To facilitate statewide de-duplication projects
OHDEP Shared Depository Catalog

- **Elite 8**
  - KSU, NEOMED, CSU, YSU, UA, UT, BGSU and WSU

Total Bibliographic Records in OHDEP: **1,258,137**

Total Item Records in OHDEP: **3,285,963**
OHDEP Shared Depository Catalog

❖ OHDEP – September 21, 2012
  ▪ Circulation and ILL from OhioLINK Central Catalog
  ▪ Record Display: Bibliographic and Item Records

❖ OHDEP Serial Holdings
  • YSU (Jeff Trimble) developed MARC Holdings guidelines and MsExcel spreadsheets for each library and is managing
    • OHDEP MARC Holdings record
    • OHDEP public display
  ▪ OCLC Serial Holdings
Questions:

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