

Broadening Horizons: Transforming Public Services with Technical Services Knowledge

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Public
Services

The diagram consists of two rectangular boxes. The left box is blue and contains the text 'Public Services'. The right box is green and contains the text 'Technical Services'. A large, hollow green arrow points from the right box to the left box, and a large, hollow blue arrow points from the left box to the right box, indicating a bidirectional relationship between the two service types.

Technical
Services

1. Improve customer service
2. Bridge communication gaps among departments
3. Relieve technical services' overload and/or improve workflow



UNIVERSITY OF
WISCONSIN **PARKSIDE**
LIBRARY

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Sample Worksheet Questions

A user needs to borrow an item. She has a Ranger Card, but it doesn't work in the card swipe and no user comes up in Alma. What do you do?

- Use her last name to manually look her up in Alma and see if she is available.
- Tell the patron she isn't in the system, so she cannot check out materials.
- Talk to a circulation supervisor about it.

You inadvertently reached a screen in Alma that you're not supposed to be in. What should you do?

- Click "Back" on the web browser (Firefox, Chrome, etc.).
- Run for a supervisor.
- Click around until you reach a screen that's familiar.
- Click "Cancel" or "Back" within the Alma screen.

Student Employee Libguide: Alma Help

- Alma Help
- Quick Links
- Materials from Other Libraries
- Library Equipment Computers, Etc.
- Phone Etiquette
- Answering Questions
- Using Chat
- Campus Geography
- Intro to the Archives
- Meet the Library Staff

Registering a New User

Unless otherwise stated, new users are almost always **COMMUNITY**.

To register a new user, click on the blue Alma drop down menu. Toggle over to **Checkout/Checkin**. Then toggle down to **Manage Patron Services**.

You should get the checkout screen. On the right hand side of the page, click on Resiger New User.

Go to Return Items

Register New User

Once you click on this button, a new screen should appear. We'll go through the necessary steps together.

Here is the first step of Registering a New User:

User Details

User Information

| | | | |
|--------------|---|---|--|
| First name * | <input type="text" value="John"/> | Middle name | <input type="text" value="Q"/> |
| Last name * | <input type="text" value="Public"/> | Primary identifier * | <input type="text" value="This is where you put the new barcode #"/> |
| Title | <input type="text"/> | | |
| PIN number | <input type="text"/> | <input type="button" value="Generate"/> | |
| Job category | <input type="text" value="Please select a value"/> | Job description | <input type="text"/> |
| Gender | <input type="text"/> | User group | <input type="text" value="COMMUNITY"/> |
| Campus | <input type="text"/> | Preferred language | <input type="text" value="English"/> |
| Birth date | <input type="text"/> | Expiration date | <input type="text" value="1 year from date of issue"/> |
| Purge date | <input type="text" value="3 years from date of issue"/> | | |

Results

- Better communication
- New perspective
- Increased efficiency
- Improved understanding

3 (Reverse) Cross Training Projects at Kennesaw State University

Public Services staff helping Technical Services

*Sandra Barclay
Special Formats Cataloging Librarian*



STURGIS LIBRARY

385

HORACE W. STURGIS
LIBRARY
385 COBB AVENUE



LAWRENCE V. JOHNSON
LIBRARY

Overview at KSU

About 55 employees of library system + student assistants

5 Technical Services Librarians and 3 staff in Technical Services

3 projects in the last 5 years



2013 Project – Big Cataloging Backlog

- Idea from new Library Director
- Director asked for volunteers to help
- We also had 2 interns at different times who helped



2013 Project – Big Cataloging Backlog Statistics

| | June | June-Errors | July | July-Errors | August | August-Errors | |
|----------|------|-------------|------|-------------|--------|---------------|------|
| Intern 1 | 65 | 20% | 188 | | - | | |
| Intern 2 | 229 | 7.9% | - | | - | | |
| Hank | 84 | 7.1% | 141 | | - | | |
| Sophia | 77 | 6.5% | 162 | | 49 | | |
| Madelyn | 40 | 20% | 218 | | - | | |
| TOTAL | 495 | 10% | 709 | 15% | 49 | | 1253 |

1253 books cataloged was worth the effort!

2013 Project – Big Cataloging Backlog Lessons Learned

- Too many errors
- Training plan
- Catalogers needed to change their mindset on what was important



2015 Project - Data Review

- Consolidation
- Volunteers from Public Services to serve as back ups
- Trained together with Technical Services staff



Cataloging Data Review Training

Backup people

- Jeff, Amie, and Carl
- Backups will fill in if/when needed – to do review in area of absent person.

Review

5 day period – March 3-9 – maybe a few days earlier

2 types of data review during the 5 day period :

Review Part A - check randomly selected samples of Bibs, Mfnds, Items for both libraries

Review Part B - check a few of every combination of your assigned current locations and items (example: General Oversize (location), book (item type) to see that they are migrated properly using the Merge Map.

In Google Cataloging -> DATA REVIEW folder

Emma - Google

How to use the form:

- Review Part A
- Review Part B

Important Points:

- Do not fix any errors in either system.
- Do some in every area each day. Snow, fire, plague could come!

You may be the only person looking at your locations -- you will be responsible for making sure that they migrated properly.

Voyager Cataloging - [lib 685401 : When sugar ruled : economy and society in northwestern Argentina, Tucumán, 1876-1916 / Patricia Juarez-Dagpe]

File Edit Record Display Options Window Help

New Open Save Search Headings Titles Save to DB Get Bib New Hldgs Get Hldgs New Items Get Items Hierarchy Help

MAFC System | History |

Suppress from DPAC

Leader: [0105loc a200007 a 450] [00]

005: [0010073146214 0] [00]

008: [130015 1 2010 ____ dlc ab ____ b ____ 0 0 1 ____ 0 ____ eng ____]

| Tag | fl | qz | Subfield Data |
|-----|----|----|---|
| 010 | | | 1a 2000047876 |
| 005 | | | 1a (OCoLC)ocn471811377 |
| 040 | | | 1a DLC 2b eng 1c DLC 1d BTCTA 1e YDXCP 1f CDX 1g Ca |
| 016 | 7 | | 1a 015621986 22 Uk |
| 020 | | | 1a 9780896802742 (pbk. : alk. paper) |
| 020 | | | 1a 0896802744 (pbk. : alk. paper) |
| 020 | | | 1a 9780896804630 (electronic) |
| 020 | | | 1a 0896804631 (electronic) |
| 043 | | | 1a s-ag--- |
| 050 | 0 | 0 | 1a HD9114.A72 1b J83 2010 |
| 049 | | | 1a GKJ |
| 100 | 1 | | 1a Juarez-Dagpe, Patricia Isabel, 196 |
| 245 | 1 | 0 | 1a When sugar ruled : 1b economy a |
| 260 | | | 1a Athens : 1b Ohio University Press |
| 300 | | | 1a ill, 233 p. : 1b ill., maps : 1c 22 c |
| 480 | 1 | | 1a Ohio University research in intern |
| 504 | | | 1a Includes bibliographical reference |
| 505 | 0 | | 1a Introduction : setting the stage -- f |
| | | | factory workers -- Sugar and the pro |
| 650 | 0 | | 1a Sugar trade 1z Argentina 1z Tucu |
| 650 | 0 | | 1a Sugar trade 1z Argentina 1z Tucu |
| 651 | 0 | | 1a Tucumán (Argentina) 1x Econom |
| 651 | 0 | | 1a Tucumán (Argentina) 1x Econom |
| 651 | 0 | | 1a Tucumán (Argentina) 1x Social co |
| 651 | 0 | | 1a Tucumán (Argentina) 1x Politics a |
| 651 | 0 | | 1a Argentina 1x Politics and govern |
| 651 | 0 | | 1a Argentina 1x Politics and govern |
| 830 | 0 | | 1a Research in international studies |
| 994 | | | 1a C0 1b GKJ |

Voyager Cataloging -

File Edit Record

New Open

Voyager Cataloging - [lib 713307 for lib 685401 : When sugar ruled : economy and society in northwestern Argentina, Tucumán, 1876-1916 / Patricia Juarez-Dagpe]

File Edit Record Display Options Window Help

New Open Save Search Headings Titles Save to DB Get Bib New Hldgs Get Hldgs New Items Get Items Hierarchy Help

MAFC System | lib 713307 | History |

Suppress from DPAC

Leader: [0015loc a2000001 450]

005: [00130000754323 0] [00]

008: [130017 2 p ill 0 1 2 001 a u eng 0 13070]

| Tag | fl | qz | Subfield Data |
|-----|----|----|---|
| 852 | 0 | | 1b Stacks 1b HD9114.A72 1b J83 2010 1b Copy 1 |

Title: [When sugar ruled : economy and society in northwestern Argentina, Tucumán, 1876-1916]

Location: [Stacks] Call #: [HD9114.A72 J83 2010]

Barcode: [XXXXXXXXXXXX] Temp. Loc.: []

Pres. Loc.: [Stacks] Temp. Type: []

Item Type: [book] Media Type: []

Engn: []

Over: []

Year: []

Caption: []

Free text: []

Spec: []

Data Review Checklist

Bibliographic Record

| | Tab | Tag (Field numbers) | Indicator | Subfield | Note |
|-----------------------|---------|-----------------------------|---|---|--|
| Control Fields | | | | | |
| 1 | MARC | Leader: Type of Record | | a | Language material |
| 2 | MARC | Leader: Bib level | | m | Monograph |
| 3 | MARC | 008 | | | Fixed - all this should transfer to new database |
| 4 | History | | | | Compare - did new record retain history? |
| Data Fields | | | | | |
| 1 | | 020 (ISBN) | indicators migrated to new database if there are any? | a | 10-digit or 13 digit ISBN |
| | | 035 (system control number) | | z | Canceled ISBN |
| | | | | a | is the number the same in old and new? |
| | | | | 9 | in new database, this is the Bibliographic number from the old database - at the top of the window of old record. |
| 3 | | 050 (LC call number) | | ab | did call number migrate to new database? |
| 4 | | 1xx (main entry) | | | check the indicators between the tag and subfields (sometimes one will be blank) |
| 5 | | 245 and 246 (title) | | | check the indicators between the tag and subfields (sometimes one will be blank) |
| 6 | | 490 (series statement) | | | are the series entries the same in both records? |
| 7 | | 830 (series added entry) | | | are the series entries the same in both records? |
| 8 | | 590 (local notes) | | notes from Marietta campus - are they there and do they say (Marietta Campus) at end? | |
| 9 | | 592 (local notes) | | notes from Kennesaw campus - are they there? | |
| MFHD | | | | | |
| 1 | MARC | Leader: Type of Record | | x,v | second letter (byte 7) x - single part items or v - multiple part items |
| 2 | MARC | Leader: Encoding Level | | 1,3,4 | encoding level (byte 17) 1 - single part items, 3 - multiple part items, 4 - multiple part (2 or more levels of enumeration) |
| 3 | History | | | | did it retain history? |
| 4 | | 852 (location) | indicators migrated to new database if there are any? | | is first indicator 0 - LC class number? |
| | | | | b | \$b location correct? check Merge Map! |
| | | | | h | \$h call number correct or present? |
| 5 | | 866 (textual holdings) | | 8 | field link info present? ex) ‡8 0 |
| | | | a | did coverage info transfer? ex) ‡a v.1-v.3 | |
| Item Record | | | | | |
| 1 | | Call number | | | correct? |
| 2 | | Barcode | | | correct? |
| 3 | | Perm Location | | | same as MFHD? |
| 4 | | Item Type | | | correct? check Merge Map! |

Cataloging Data Review for Voyager Consolidation

| | Person 1 | Person 2 | Person 3 | Person 4 | Person 5 | Team Totals |
|------------------------------|-------------|-------------|-------------|------------|-------------|-------------|
| Bib | 530 | 529 | 400 | 400 | 265 | 2124 |
| MFHD | 530 | 531 | 450 | 453 | 165 | 2129 |
| Item | 528 | 530 | 425 | 424 | 214 | 2121 |
| total | 1588 | 1590 | 1275 | 1277 | 644 | 6374 |
| Day 1 completed bibs | 25 | 7 | 27 | 20 | 20 | 99 |
| completed mfhds | 15 | 17 | 23 | 10 | 14 | 79 |
| completed items | 15 | 17 | 34 | 18 | 12 | 96 |
| % complete to date | 3.463476071 | 2.578616352 | 6.588235294 | 3.75880971 | 7.142857143 | 4.298713524 |
| Day 2 completed bibs total | 53 | 67 | 124 | 74 | 108 | 426 |
| completed mfhds total | 0 | | | | | |
| completed items total | | | | | | |
| total to date | 53 | 67 | 124 | 74 | 108 | 426 |
| % BIBS complete to date | 10 | 12.66540643 | 31 | 18.5 | 40.75471698 | 20.05649718 |
| Day 3 (Thurs) total bibs cor | 300 | 226 | 266 | 310 | 108 | 1210 |
| % BIBS complete to date | 56.60377358 | 42.7221172 | 66.5 | 77.5 | 40.75471698 | 56.96798493 |
| Day 4 (Friday) bibs comple | 530 | 452 | 400 | 400 | 265 | 2047 |
| %BIBS complete to date | 100 | 85.4442344 | 100 | 100 | 100 | 96.3747646 |

2015 Project - Data Review

Lessons Learned

- We used Public Services staff who had been trained
- They worked off spreadsheets “assigned” to other staff
- Their time was limited – their priorities were different than ours
- Helped to have treats around
- No way to evaluate accuracy



2016 Project – Special Cataloging for Centers

- Director asked for 2 volunteers from library faculty
- 7 months, 4 hours per week



2016 Project – Special Cataloging for Centers

| | Cataloged | Errors |
|-------------|-----------|--------|
| Volunteer 1 | 235 | 6% |
| Volunteer 2 | 364 | 4% |
| Total | 599 | |



2016 Project – Special Cataloging for Centers

Things came up

- Family issues/Vacations
- Another job
- Fizzled out



2016 Project – Special Cataloging for Centers

Lessons Learned

- Takes a lot of time to train, review, reinforce, and maintain quality
- Better training made a big difference in errors
- Public service people get to see and appreciate what we do
- They like doing something different



Challenges from 3 Projects

- It took a lot of time to quality check the work – was it worth it?
- It took a lot of time to set up Voyager and OCLC authorizations, Connexion and Voyager preferences on workstations, organizing who was expected what day/time and which workstation they would work on, and making sure there would be work for them to do



Positive Outcomes from 3 Projects

- We learned that good training makes a big difference
- We got to know each other better
- Helped Public Services in their job duties: understanding call numbers better, details in the MARC fields, understanding time it takes to copy catalog, better relationships with Technical Services
- Helped Technical Services: improve our documentation, develop better relationships with others, 1852 books got cataloged that might still be waiting, data got reviewed that would not have



Participants said

“It was an incredibly valuable experience!”

“This helped me understand the catalog, subject headings, and book acquisitions better”

“I was able to understand some of the challenges related to this type of work and the time and knowledge it takes to make sure the records are accurate and helpful to our patrons”

“It was a great opportunity to experience the work of a different unit of the library”

“Reinforced my belief that library staff who work in public service areas and technical service areas truly benefit from spending time in each others jobs”



Broadening the Reference Interview: Teaching E-Resource Troubleshooting to Front Line Staff

Kate Hill

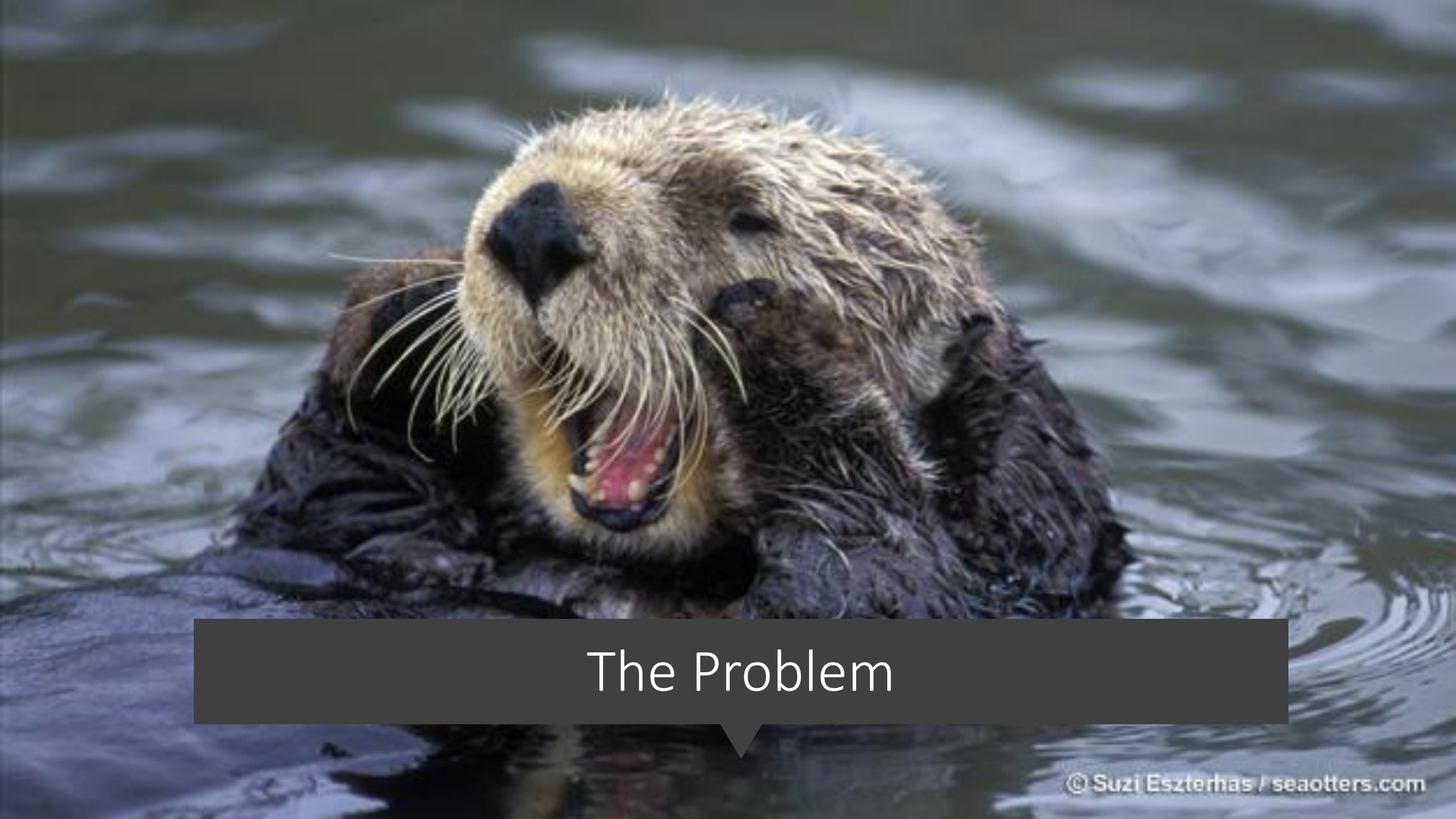
Electronic Resources Librarian

University of North Carolina at Greensboro




THE UNIVERSITY *of* NORTH CAROLINA
GREENSBORO

University Libraries



The Problem

to resources 

A-Z doesn't think we have Museum helveticum, but the catalog knows that we do.




Hi,

A patron called who was unable to connect to the Springer Link database for the last two days on multiple browsers and I didn't have any luck connecting, either.

<https://library.uncg.edu/dbs/auth/go.asp?vdbID=428>



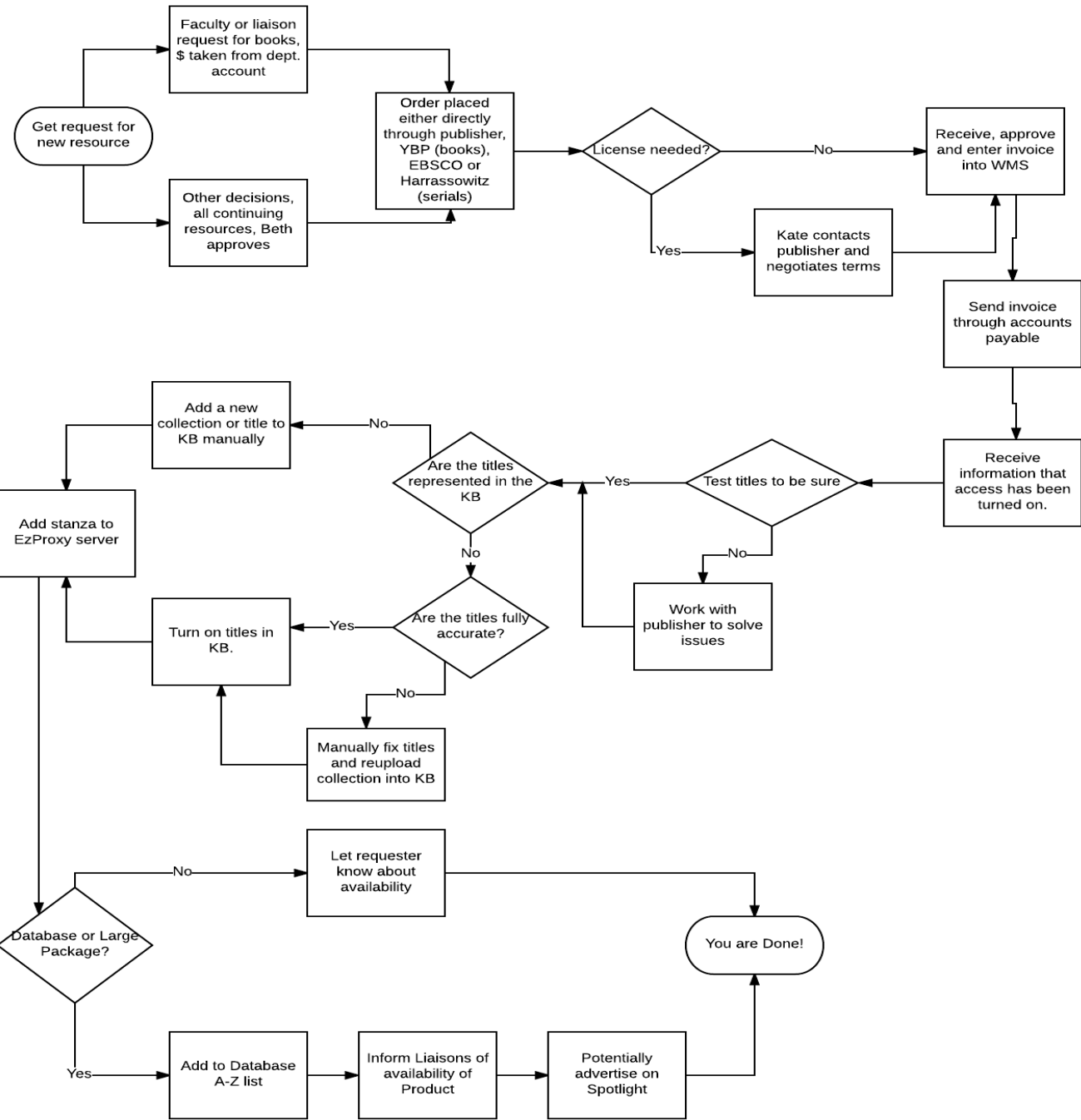
4 older messages

 **Electronic Resources** You are correct. We do not have access to ... 1/8/16 

  1/8/16   

to me 

Right. :) But is there any reason that our database link isn't working?



Ulterior Motives



dailyotter.org/2011/08/14/plotting-otter-plots/



The plan: Let's do a workshop!

E-Resources Troubleshooting Pre Assessment

Please answer the following questions before Friday, March 4th. They will help me make sure that the workshop

How comfortable are you with diagnosing the cause of an electronic resource access problem?

| | | | | |
|------------------------|-----------------------|-----------------------|-----------------------|------------------|
| | 1 | 2 | 3 | |
| Not comfortable at all | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | Very comfortable |

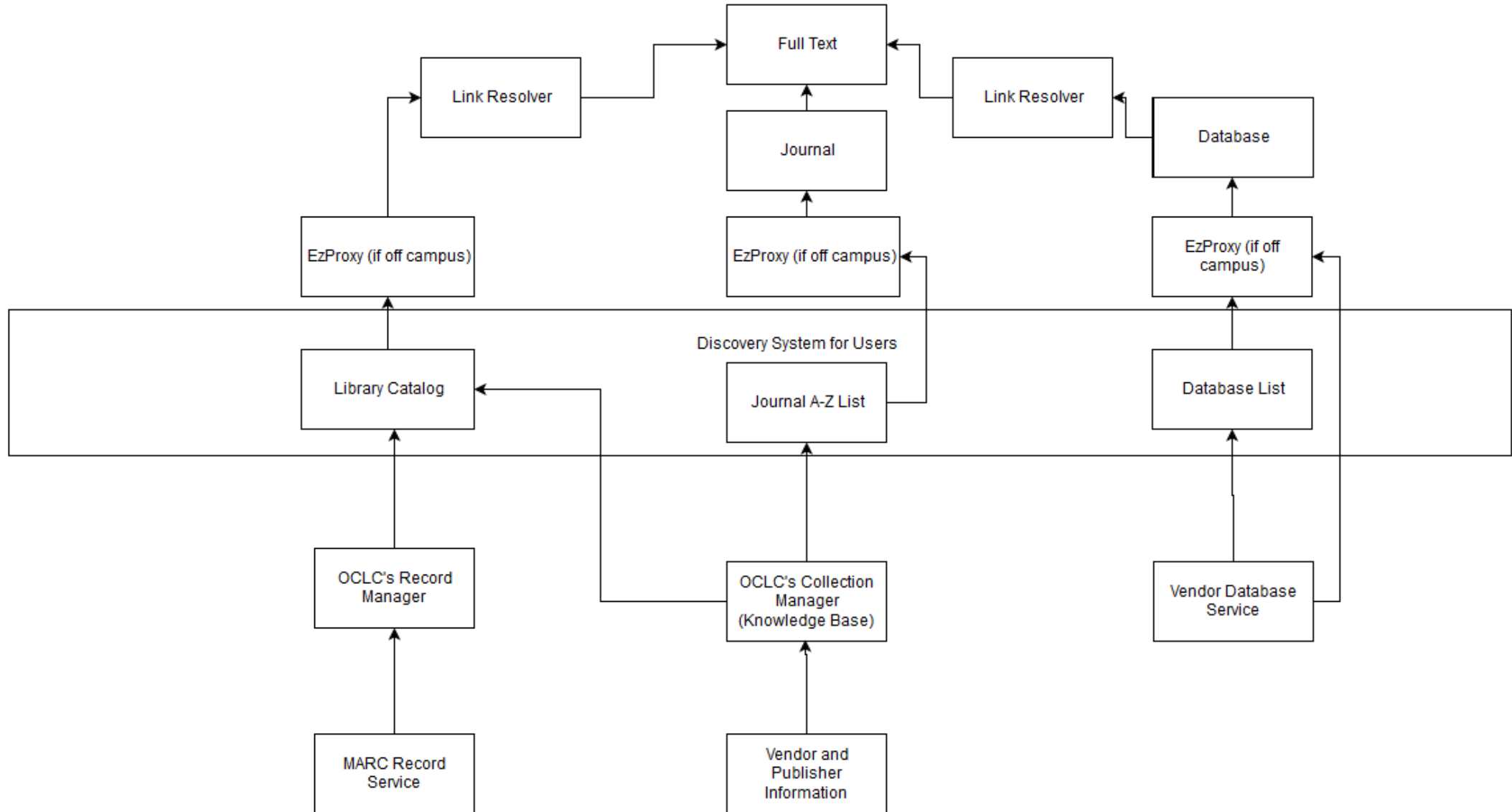
How comfortable are you with explaining an access issue clearly to a patron?

| | | | | |
|------------------------|-----------------------|-----------------------|-----------------------|------------------|
| | 1 | 2 | 3 | |
| Not comfortable at all | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | Very comfortable |

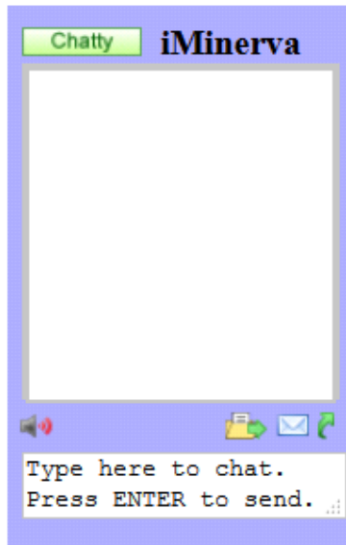
How knowledgeable are you about the back-end systems that control access (OCLC knowledgebase and catalog, VDBS, EzProxy, etc.)?

| | | | | |
|--|---|---|---|--|
| | 1 | 2 | 3 | |
|--|---|---|---|--|

Text



Communication!



Are you trying to access this resource from on or off campus?

Can you tell me where you are when you are trying to access this resource (for example, google, our databases page, our journal A-Z list, the catalog). Could you maybe send me a link?



What error message are you seeing when you try and access this resource?

erhelp@uncg.edu (Your Best Referral!)

- Provide:
 - Name and contact info of the patron
 - Name of resource and what access method they were using to get to the resource (Journal A-Z? Database? Google Scholar? The Catalog?)
 - Error message received (if any)
 - Description of any methods you used to do initial troubleshooting.

A Chat comes through...

- Hello, I am trying to access an article in the International Journal of Nursing Education Scholarship, and the library website says we have access, but when I click on the link to the article there is only an option to purchase the article or sign in with a username or password. Please advise.

Lessons Learned





More group
work



Drawing by Sam Garton.



©Kit Chase, 2012

This time with
librarians!

Illustration by Kit Chase
“Bookish Otter”

Actual computer lab!





More group
work

Assessment



Illustration by Sam
Garton

Positives

I really like the explanation of how things are handled on the backside.

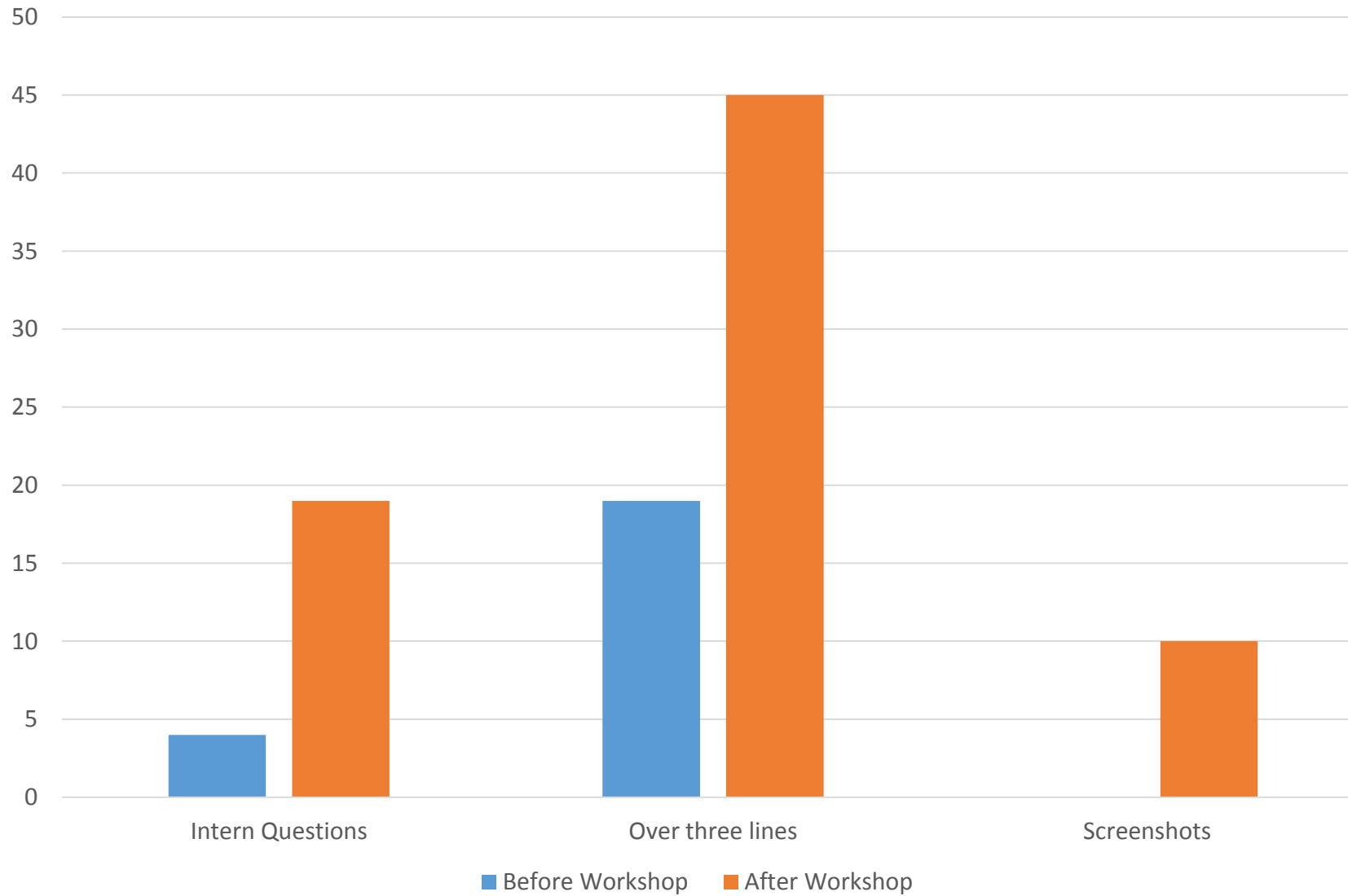
the flow chart of sorts on how to diagnose technical issues was great!

Negatives

spending more time on the flowchart(especially the bottom boxes) for clarity with solid examples would have helped clarity.

More time for the practical side of training as it was helpful but my partner was not able to give it a go because of time constraints

Improvement in erhelp emails



Next Steps



Photography by
Jack Clegg for the
BBC

Bridging the Technical Services Gap for Subject Liaisons

Krista Schmidt
RIS Librarian/STEM Liaison
Western Carolina University

Problems Categorized

Workflow Confusion

Language Disconnects

Information Overload

Underlying Reasons

Philosophy vs. Practice

Training

Routine vs. Rare

Framework for Liaison Guidance

To start: Brainstorming session; main processes and main issues

Questions ONLY. No answers
Practical, not philosophical in nature

Later: Fine details and specific questions; nitty-gritty

Combed email, minutes, etc.

Finally: Refine questions and detail amount

Examples: Main Process Categories

Collection Development

Budget

Ordering

Acquisitions

Receiving & Processing

Cataloging

Collection Maintenance

Examples: Main Process Categories

Collection Development

Budget

Ordering

Acquisitions

Receiving & Processing

Cataloging

Collection Maintenance

Examples: Main Process Categories

Collection Development

Budget

Ordering

Acquisitions

Receiving & Processing

Cataloging

Collection Maintenance

Examples: Main Process Categories

Collection Development

Budget

Ordering

Acquisitions

Receiving & Processing

Cataloging

Collection Maintenance

Question Examples:

Budget

What happens to money from fees and fines; does that money come back to the library? Does money for lost books go directly to replacement funds?

What is the process for requesting additional continuing resources or for making changes to the suite of continuing resources to which the library subscribes? How does this affect allocations?

Acquisitions

How long does pre-order searching take? Am I responsible for any of that?

Does acquisitions prioritize how orders are placed? If so, what are the prioritization criteria?

Receiving & Processing

Where are approval plan items received and processed? Are our approval items shelf-ready or not? In either case, at what point are they comingled with non-approval plan items?

When is the majority of collection designation done at this library? Who is responsible for it? Do liaisons have any say in where things go (reference, stacks, leisure reading, etc.)?

What about You?

- What cross-training initiatives have you tried in your library?
 - What worked?
 - What didn't?
- What kind of cross training would you want to try in your library that you haven't done yet?
- What do you think are the biggest barriers (both real and perceived) to implementing cross training in your library?
- Do you think any of the cross training initiatives presented could work in your library?

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