Five Years of Electronic Resources Cataloging at Ohio University Libraries

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My History with OU Libraries

- July 2001: hired straight out of library school as Electronic Resources Cataloger (new position)
- 2002/03: re-organization of technical services; my position became part of new Serials & Non-Print Cataloging Department
My History with OU Libraries

- Late 2004/early 2005: replaced retiring supervisor as head of Serials & Non-Print Cataloging Department
- Am still responsible for day-to-day work of e-resource cataloging
E-Resource Cataloging Policies and Procedures

from chaos to consistency
Starting Point: 2001

Many e-resource cataloging policy decisions had been made by non-catalogers

- Assistant Dean for Collection Development
- Bibliographers’ Council
- E-resources Team
- “Squeaky wheel” individuals
Starting Point: 2001

- Policies were idiosyncratic to OU Libraries and incongruent with state and national standards (OCLC, AACR, OhioLINK)
- Policies were labor-intensive and required much duplication of effort
- Decisions were not documented; reasoning behind policies was no longer clear
2001-2006: Traveling Toward Consistency

- Examine professional literature and state and national standards for e-resource cataloging
- Work to incorporate best practices and standards into OU Libraries policy
- Advocate for the elimination of labor-intensive idiosyncratic policies (a work in progress)
Coordinating Acquisitions and Cataloging

from chaos to consistency
Starting Point: 2001

- Assistant Dean for Collection Development personally handled e-resource acquisitions
- Cataloger was often unaware of new e-resource subscriptions or changes to old subscriptions
- Introductory e-mails, vendor contact information, licenses, etc. were inaccessible to cataloger
2001-2006: Traveling Toward Consistency

Retirements and new hires in Acquisitions and Collection Development create opportunities for change

- Keep introductory e-mails, license agreements, etc. organized and accessible
- Establish specific procedures to ensure electronic titles are activated and cataloged
2001-2006: Traveling Toward Consistency

2004-present: OU Libraries create and fill position of Electronic Access Librarian

- Registers/activates subscriptions & serves as vendor contact
- Establishes procedures to ensure cataloger is aware of new subscriptions and changes to existing subscriptions
Which E-Resources Get Cataloged?

from squeaky-wheel system to
(more) consistent policy
Starting Point: 2001

Cataloging was often initiated when a non-cataloger asked that a particular set of e-journals, e-books, etc. be cataloged

- Assistant Dean for Collection Development
- Reference Librarians
- Subject Bibliographers

Many items went uncataloged because no one had asked for them to be cataloged
Starting Point: 2001

- Catalogers were out-of-touch with the relative popularity, importance, and cost of various e-resources.
- Squeaky wheel principle trumped rational consideration of the value gained from cataloging particular sets of e-journals and e-books.
2001-2006: Toward Inclusive Cataloging

Consider rational criteria when performing cataloging triage

- Scholarly importance of resource
- Cost of resource
- Size of potential audience
- Ease of access by methods other than the catalog
- Feasibility of cataloging job (including availability of vendor-supplied records)
2001-2006: Toward Inclusive Cataloging

- Inventory large sets of uncataloged, paid-access e-journals and e-books
- Examine alternatives and discover the best approach to cataloging each specific set
  - Vendor-supplied records
  - Batch searching in OCLC
  - Quickly-created “short form” Marc records
  - Old-fashioned, title-by-title cataloging
  - Etc.
Cooperative Cataloging and Outsourcing

taking advantage of opportunities
Starting Point: 2001

- Catalogers feared that outsourcing would threaten catalog quality and job security.
- Government documents cataloging was outsourced, but possibilities for outsourcing other e-resource cataloging had not been seriously investigated.
2001-2006: Toward More Outsourcing and Cooperation

- Dean of Libraries supports and encourages outsourcing
- Successful experiences build staff acceptance
  - OCLC PromptCat
  - Prefabricated Marc records for e-resources provided for free (by vendors and/or OhioLINK)
2001-2006: Toward More Outsourcing and Cooperation

- 2005: OU libraries contract with Serials Solutions to provide a limited number of prefabricated Marc records for electronic journals
- January 2006: contract expanded to provide over 30,000 Marc records for e-journals
- Goal of universal cataloging for paid-access e-journals is brought much closer to reality
Lessons Learned

- Set rational cataloging policies congruent with national standards
- Non-catalogers’ input is necessary and welcome, but catalogers should be the ones to ultimately set cataloging policy
- Document policy decisions
Lessons Learned

- Establish a clear procedure for informing catalogers of new electronic acquisitions
- Make cataloging triage decisions based on rational criteria
- Examine alternatives to find the best approach to cataloging each set of e-resources
Lessons Learned

- Embrace outsourcing and cooperation. It's the only way a large modern library can come close to providing full cataloging of its subscription e-resources.
- Accept that e-resources are here to stay. Catalogers must take ownership of the task of providing access to these resources.
Recommended Reading


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Contact Information

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