

Gabi Gulya, Metadata Librarian

Staci Ross, Cataloging/Metadata Librarian

Brenda Salem, Hispanic Languages Catalog Librarian

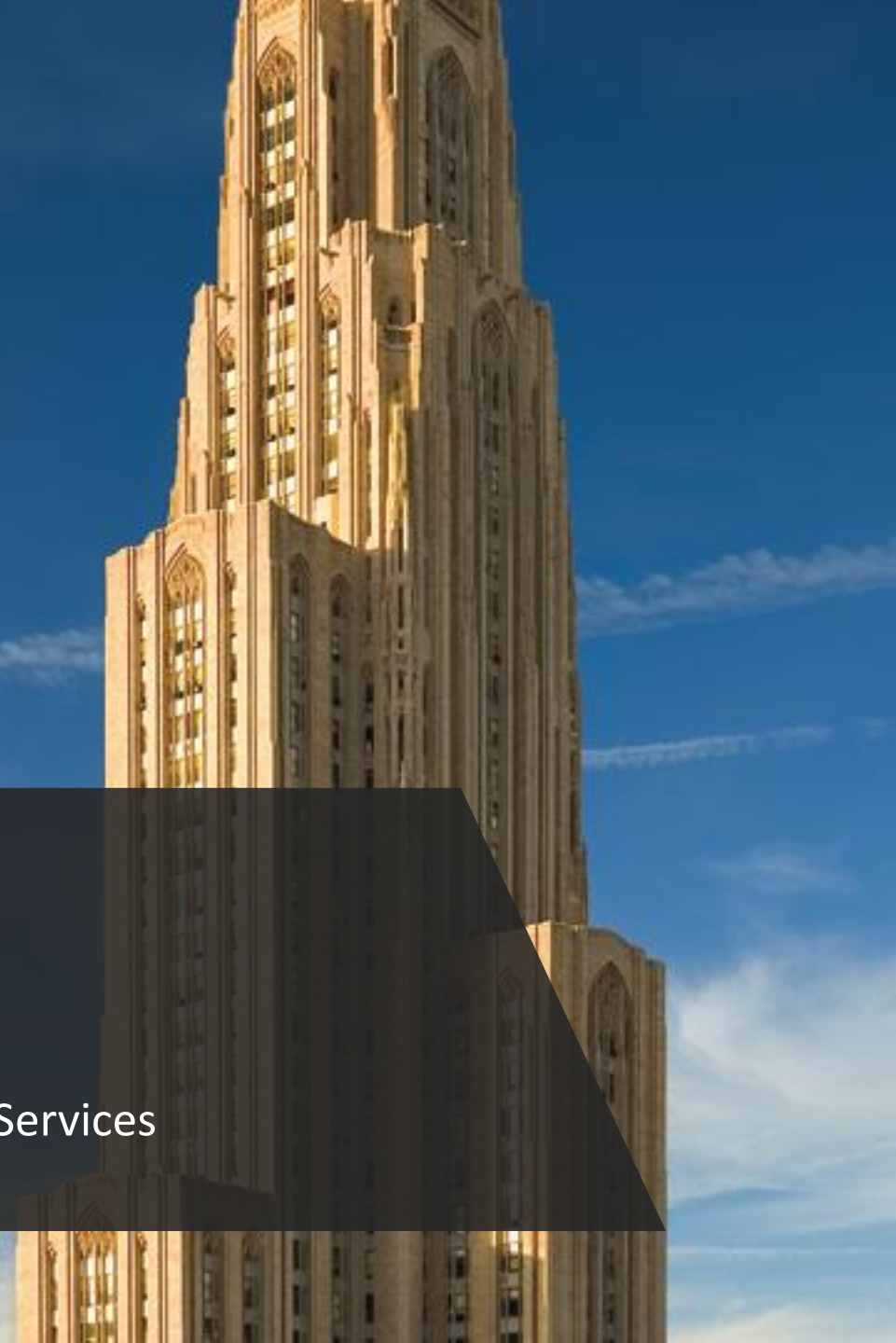
University Library System, University of Pittsburgh

WPWWC ACRL Conference Summer 2020

Recording available at: <https://youtu.be/UTy4kKhXkz0>


# On the Same Page:

Fostering a Culture of Collaborative Communication in Technical Services





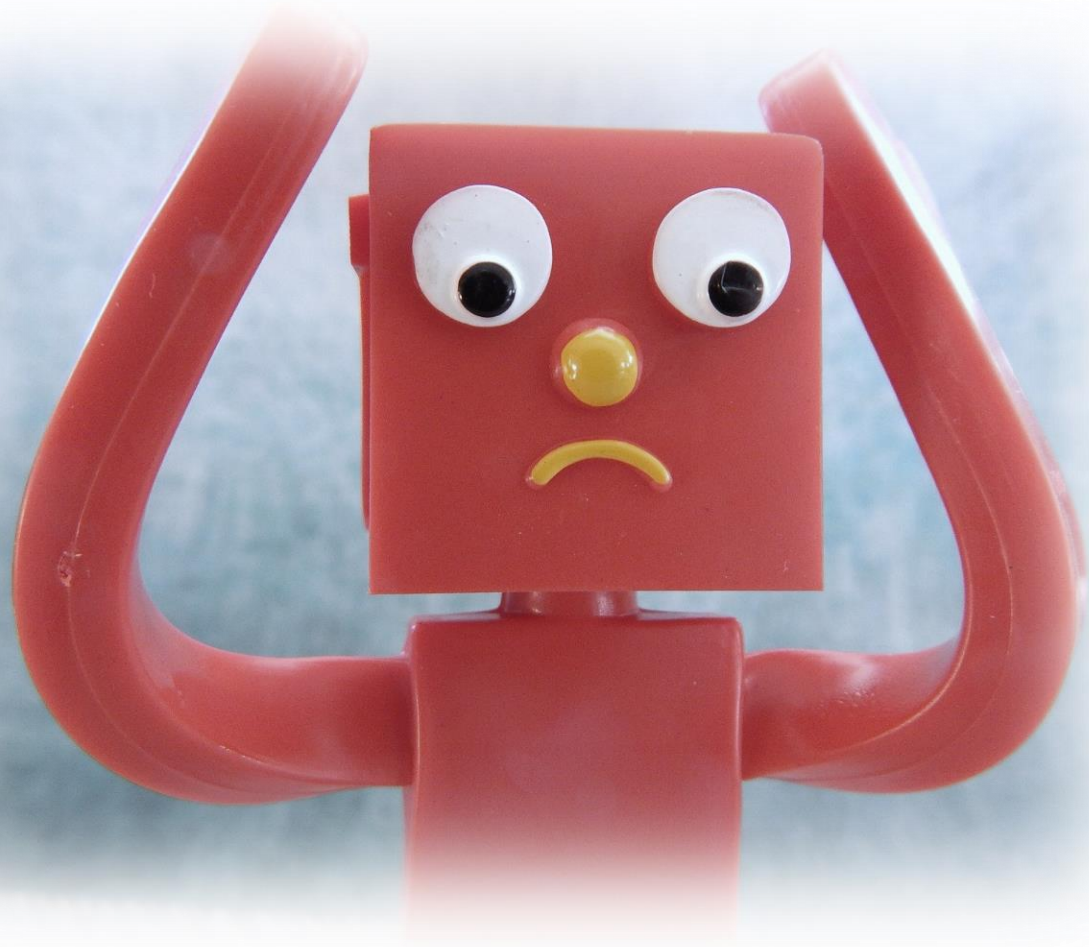
**WHY  
DOCUMENTATION  
MATTERS**

A road closure sign with the text "ROAD CLOSED" in bold black letters on a white background. The sign is mounted on a metal post and is flanked by two vertical posts supporting three horizontal barriers with red and white diagonal stripes. The background shows a desert landscape with sand dunes and sparse green vegetation under a clear blue sky.

**ROAD  
CLOSED**

- Staff changes and attrition
- Changing nature of library services, resources, and technology
- Unify actions and decisions
- Communicate local practice
- Contribute to the profession
- Sense of responsibility and professionalism





***Staff Attrition***

***Technology***

***Library Services***

***Local Practice***



42% - Employee's brain

22% - Paper documentation

20% - Electronic documentation

12% - Electronic knowledge base





*University of Pittsburgh*

# University Library System

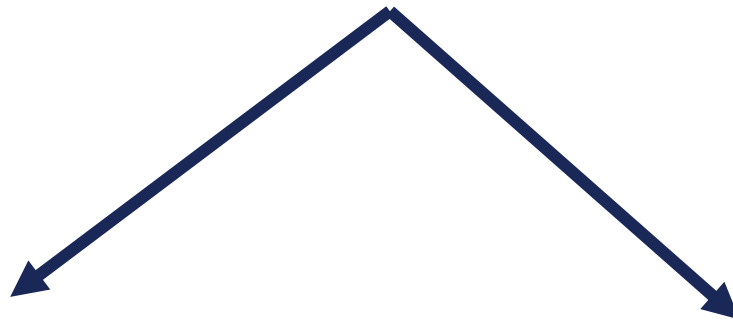
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RESOURCES | TECHNOLOGY | EXPERTISE

## Technical Services

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4 Units



9 Librarians

17 Full Time Employees  
(6 Paraprofessionals)



Previous Attempts  
at  
Documentation



[cataloging](#)[geography](#)[languages](#)[orgs/pubs](#)[general](#)[bolivia](#)[videos](#)[cd-roms](#)[pitt](#)[other catalogs](#)[misc](#)

## CATALOGING

[Classweb](#)[Cataloger's Desktop](#)[Bibliographic Formats and Standards \(OCLC\)](#)[MARC 21 Concise Format for Authority Data \(LC\)](#)[MARC standards \(LC\)](#)[Genre/Form Headings at LC: General Information \(LC\)](#)[OCLC Connexion browser](#)[Worldcat \(OCLC\) / free Worldcat Beta](#)[Connexion client documentation](#)[Connexion: Search and Browse Worldcat](#)[Connexion System Alerts](#)[RLG-OCLC Transition](#)[RLG's Eureka \(RLIN\)](#)[Voyager Wiki / Endeavor SupportWeb](#)[TB250: Parallel Records](#)[TB251: Connexion WorldCat Searching \(table of indexes\)](#)[TB253: ISBN and OCLC Number Changes](#)[Duplicate Records Report \(OCLC\)](#)[Authority Record Change Request \(OCLC\)](#)[NACO / SACO / PCC / CPSO](#)[free PDFs of CDS publications](#)[NACO Participants' Manual](#)[Literary Author \(053\) Request Form \(LC\)](#)[Change in Practice for Counting Non-Filing Characters \(LC\)](#)[Access Level Record for Serials Pilot Project \(CONSER\)](#)[Autocat archives](#)

## GEOGRAPHY

[GEOnet Names Server \(NGA\)](#)[Geographic Names and the World Wide Web \(CPSO\)](#)[MARC Code list for Countries](#)[MARC Code list for Geographic Areas](#)[Geographic Cutter Numbers \(Tables G1548-G9804\)](#)[UT Maps collection - The Americas](#)[Maps of Latin America \(LANIC\)](#)[World Atlas - South America](#)[UN Cartographic Section](#)[Reference Web Resources \(LC Geo. & Map Reading Room\)](#)[Embassy World maps by country](#)[Multimap search page for regional maps](#)[Tesauro ISOC de Topónimos](#)[Tesauro Alfabético Conceptual - Bolivia section](#)[Thesaurus of Geographic Names \(Getty\)](#)[Maps of Bolivia \(Embassy World\)](#)[Maps of Cuba \(Embassy World\)](#)[Maps of Brazil \(Embassy World\)](#)[Languages of Bolivia map \(Ethnologue\)](#)[Languages of Brazil map \(Ethnologue\)](#)

## Catalog Management Unit Procedures

<a href="#">receiving</a>	<a href="#">member copy cataloging</a>	<a href="#">dvds</a>	<a href="#">microforms</a>	<a href="#">maps</a>	<a href="#">sound cds</a>	<a href="#">cd-roms</a>	<a href="#">special collections</a>	<a href="#">resources</a>
<b>GENERAL RESOURCES</b> <a href="#">MARC Code list for Countries</a> <a href="#">MARC Code list for Geographic Areas</a> <a href="#">NACO Participants Manual</a>								
<b>RECEIVING</b> <a href="#">Local Document on Receiving?</a>								
<b>MEMBER COPY CATALOGING</b>								
<b>Local Procedures</b> <a href="#">Member Copy Cataloging Guide (Revised 2/10)</a> <a href="#">Book Sizing Designations</a>								
<b>Resources</b> <a href="#">Cataloger's Desktop</a> <a href="#">RDA Toolkit</a>								
<b>DVDs and OTHER AUDIO-VISUAL</b>								
<b>Local Procedures</b> <a href="#">Videorecordings Cataloging Guide (Updated 7/11)</a> <a href="#">Processing DVDs for storage</a> <a href="#">Processing DVDs accompanying a journal issue</a> Accession numbers for DVDs can be obtained from the folder in CMU, Rm.325 Place flag on item indicating DVD accession number								



Technical Services

Technical Services

Cataloging

End Processing and Serials

Thomas Boulevard Building Issues

Search this site...



Technical Services Organizational Chart

Documents

Local Procedures

Backstage Files

Special Project Procedures

Building Issue Report Form

Technical Services Sharepoint Site Project

Links

General Cataloging Resources

Professional Resources

DVDs and other Audio-Visual Cataloging

Maps Cataloging and Geography Resources

Serials Cataloging

Art Materials Cataloging

Authority Control

Language and Region Resources

CD-ROM Cataloging

RDA TRAINING

Discussions

Cataloging Discussion

 All Site Content

[Technical Services SharePoint Site](#)

[Technical Services Organizational Chart](#)

[ULS Staff Directory by Department](#)

[Technical Services SharePoint Site Project](#)

Local Procedures

<input type="checkbox"/>	Type	Name	Modified	Modified By
		Cataloging	7/9/2012 2:52 PM	Salem, Brenda
		End Processing	7/9/2012 2:52 PM	Salem, Brenda
		Ordering and Acquisitions	10/2/2013 3:34 PM	Salem, Brenda

Special Project Procedures

<input type="checkbox"/>	Type	Name	Modified	Modified By
		Nesbitt project revision July 2013D	1/7/2014 3:30 PM	Salem, Brenda





## Catalog Management Unit Procedures

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### GENERAL RESOURCES

[MARC Code list for Countries](#)  
[MARC Code list for Geographic Areas](#)  
[NACO Participants Manual](#)

### RECEIVING

[Local Document on Receiving?](#)

### MEMBER COPY CATALOGING

#### Local Procedures

[Member Copy Cataloging Guide \(Revised 2/10\)](#)  
[Book Sizing Designations](#)

#### Resources

[Cataloger's Desktop](#)  
[RDA Toolkit](#)

### DVDs and OTHER AUD

#### Local Procedures

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### [cataloging](#)

### [geography](#)

### [languages](#)

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### [general](#)

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### [cd-roms](#)

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[Tesauro Alfabético Conceptual - Bolivia section](#)  
[Thesaurus of Geographic Names \(Getty\)](#)  
[Maps of Bolivia \(Embassy World\)](#)  
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[Maps of Brazil \(Embassy World\)](#)  
[Languages of Bolivia map \(Ethnologue\)](#)  
[Languages of Brazil map \(Ethnologue\)](#)



Catalog Management Procedures Page

Latin American Links Page





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<input type="checkbox"/>		Nesbitt project revision July 2013D	1/7/2014 3:30 PM	Salem, Brenda

# Technical Services SharePoint Site





Difficult document management system interface

Users not invested

Lack of transparent  
communication

Inconsistent storage and  
update of documents







## Documentation Needs for Open, Collaborative Communication Systems

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- Shared documentation
- Shared access
- Shared ownership
- Version control



Legacy  
documentation

The background is a detailed technical drawing of a mechanical assembly, likely a turbine or engine component, rendered in white lines on a blue grid. The drawing includes various parts, dimensions, and labels such as 'Turbine 13', 'Maschine', 'Abflüßkanal', 'Luft', and various alphanumeric codes like 'A1', 'A2', 'B', 'C', 'D', 'E', 'F', 'G', 'H', 'M', 'N', 'O', 'P', 'Q', 'R', 'S', 'T', 'U', 'V', 'W', 'X', 'Y', 'Z'. A central white arrow points from the bottom-left oval to the top-right oval. Two other white arrows point downwards from the top-left and top-right ovals to the bottom-left and bottom-right ovals, respectively.

Plan

Platform

User buy-in

# WHY DOCUMENTATION MATTERS





# Remote Work Procedures

Updated Pages

[Back to Technical Services Wiki homepage](#)

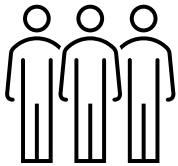
- [Metadata and Discovery](#)
- [University of Pittsburgh Digital Collections Clean-Up](#)
- [A&SC Finding Aids](#)
- [Copy Cataloging - General Guidelines](#)
- [Installing WinSCP on Your Home Computer](#)

- [Connexion Basic Installation](#)
- [Setting Up Voyager Preferences](#)
- [Guidelines for Bulk Importing Remotely](#)
- [Importing Records in Voyager](#)
- [Installing MarcEdit on Your Home Computer](#)
- [Installing WinSCP on Your Home Computer](#)
- [RDA Toolkit Remote Access](#) - Please note: Limited to 3 concurrent users.
- [ULS Help Desk Documents](#)
  - Includes instructions on accessing Remote Desktop (in Windows) and installing Voyager and Connexion on non-ULS computers

## Remote Work Procedures

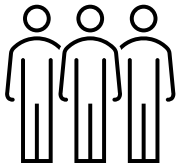
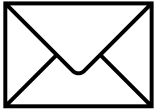
[Wiki Homepage](#)  
[Technical Services Wiki](#)

# Communication with Colleagues





# Communication with Colleagues





**Consistency of Practice**



**Consistency of Practice**



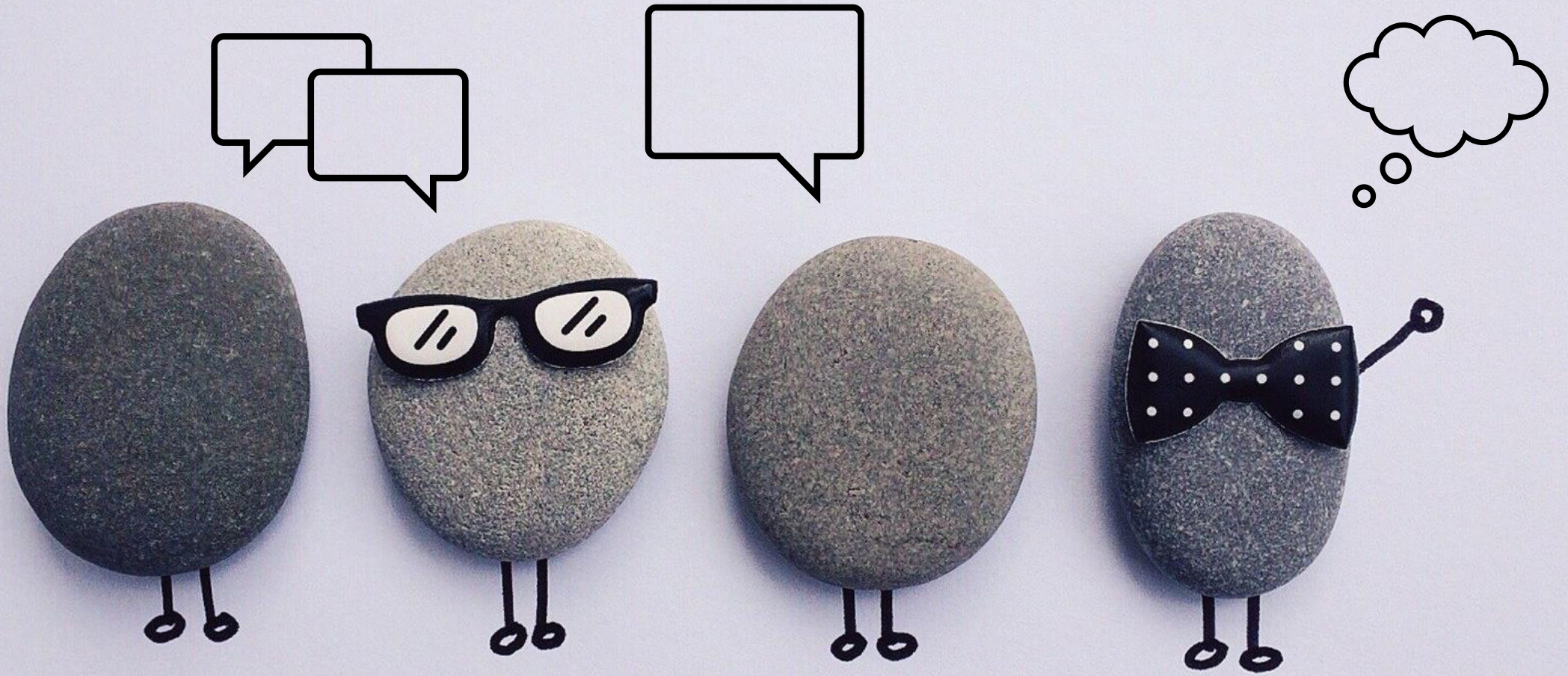
**Consistency of Practice**

# Why an Open Communication Structure is Necessary





How to Increase Community Engagement





100%





Putting It All  
Together



- Why document management and communication matters



- Previous attempts and why they failed
  - Need for open, collaborative communication
  - How to increase community engagement



Please type your  
questions/comments  
in the  
Chat window!

A small, vibrant green plant with round, succulent-like leaves is potted in a grey, textured ceramic pot. A white tag is tucked into the soil, bearing the handwritten message "THANK YOU :)" in black ink. The entire scene is set against a rustic, dark wood background with prominent grain patterns.

THANK YOU :)

Gabi Gulya – [akg45@pitt.edu](mailto:akg45@pitt.edu)

Staci Ross – [str51@pitt.edu](mailto:str51@pitt.edu)

Brenda Salem – [brs64@pitt.edu](mailto:brs64@pitt.edu)

# Works Consulted

Agarwal, Naresh Kumar and Md Anwarul Islam. 2015. "Knowledge Retention and Transfer: How Libraries Manage Employees Leaving and Joining." *VINE* 45 (2): 150-171. doi:10.1108/VINE-06-2014-0042

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Nazim, Mohammad and Bhaskar Mukherjee. 2016. *Knowledge Management in Libraries: Concepts, Tools and Approaches*. First edition. Cambridge, MA: Elsevier.

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White, Hollie C. 2005. "Documentation in Technical Services." *Serials Librarian* 49 (3): 47-55. doi:10.1300/J123v49n03\_04

*All images from pixabay.com*

# Further Readings

Bartlett, Jennifer A. and Spencer Acadia, eds. 2019. *Libraries that Learn: Keys to Managing Organizational Knowledge*. Chicago: ALA Editions.

Bazeley, Jennifer W. and Becky Yoose. 2013. "Technical Services Transparency: Using a LibGuide to Expose the Mysteries of Technical Services." *Library Resources & Technical Services* 57 (2): 118-127.

Herrera, Kevin. 2008. "From Static Files to Collaborative Workspace with SharePoint." *Library Hi Tech* 26 (1): 80-94. doi:10.1108/07378830810857825

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Mincic-Obradovic, Ksenija. 2009. "New Work Spaces: Wikis for Cataloging Collaborations." *Library Hi Tech News* 26 (7): 15-20. doi:10.1108/07419050911000517

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