LIS 775 Technical Services Operations and Systems
Fall 2016
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The purpose of this course is to provide practical experience in Technical Services operations in libraries and information centers. The course will take place in the Thomas J. Watson Library at the Metropolitan Museum of Art, to provide hands-on work in as many facets of Technical Services as possible, and to see the specifics of how they are implemented in a large research library.

Among the topics students will examine are: copy cataloging (both in Sierra and Connexion), library acquisitions, collection development, serials control, record loading, data manipulation, materials processing, knowledge organization, and integrated library systems. There will be some reading, but the focus will be on practice.

Time and place:
Classes will take place Saturdays from 12-5 in the Thomas J. Watson Library at the Metropolitan Museum of Art. Thomas J. Watson Library is the central research library of The Metropolitan Museum of Art. Its collection of books and periodicals relating to the history of art is one of the most comprehensive in the world.

Office hours/availability:
Available by appointment 9-5, M-F, or by email

Course Objectives:

Students will demonstrate an understanding of the following:

1. The operational components of a technical services department
2. The "back-end" support issues for both public and technical services
3. The materials management issues in support of library collections and access
4. The basic technical operations that support integrated library systems

Technology used in this course:
Students will become familiar with: Sierra ILS; Connexion Client; MarcEdit

Digital Portfolio-worthy assignment:
The 5 catalog records you will create in class will be appropriate for uploading to your digital portfolio.

Grading:

Since this class is focused on gaining practical experience, 50% of the grade of the class will be based on class participation, as measured by completion of in-class exercises. To gain a theoretical knowledge of technical services in a broader sense, there will be four readings, with 4 short reflection papers worth 10% each. The remaining 10% will be for the on-time submission of the MarcEdit data transformation assignment.

Reading/writing:

There is no required textbook for this class; over the course of the class, the instructor may provide additional articles for reading. For the final four weeks, students will be assigned one article relating to technical services each week; in a reflection paper, they will summarize the article briefly, briefly state the claim that the article is making, explain whether they find it persuasive, and why. These papers are graded according to the rubric below; format is not specified.

Grading rubrics for written assignments:

Reflection papers:

Full credit (5 points):

Assignment is well-written; grammatical errors, misspellings, and typos are minimal (average one-two per page) or non-existent. There is a link to the article being discussed and a citation, a summary of the article and a discussion about whether the article convinces the student with regard to its thesis. Assignment is submitted via email prior to midnight the Thursday before class.

Partial credit (3 points):

Assignment is submitted on time, clearly written, but there are some grammatical errors, misspellings or typos (3-4 per page); there is a link to the article being discussed and a citation.

No credit (0 points):

Assignment is submitted late; grammatical errors, misspellings, and typos are very frequent (average 11-14 per page) and adversely affect the structure and flow of the narrative; there is no citation or link provided for the article; no attempt is made to summarize the article, to state the thesis the article is making, or to explain why this is or is not convincing. We will discuss the articles briefly at the beginning of class.

Cataloging assignments:

Note: this assignment will provide you with a portfolio-worthy artifact of five acceptable cataloging records.

Full credit (10 points): Meets appropriate cataloging standards as discussed in class; is coded correctly and free from typos, with all required fields mentioned in assignment instructions present, authority versions of names used when appropriate

Partial credit (5 points): Meets appropriate cataloging standards as discussed in class; all required fields present; may have some fields coded incorrectly or typos present

No credit (0 points): Does not meet appropriate cataloging standards as discussed in class; many fields coded incorrectly, typos present, some required fields missing

MarcEdit data transformation assignment:
Full credit (10 points): Instructions are followed, resulting in the on-time delivery of a .mrc file, a .xml file and an Excel spreadsheet containing data from the sample raw MARC file.
Partial credit (5 points): Instructions followed but assignment is submitted late
No credit (0 points): assignment not handed in

Palmer School Learning Objectives

This course addresses the following objectives:
- Goal II (Utilize a broad range of systems and technologies to manage and deliver information), specifically IIa (use professional standards to organize, manage, preserve, evaluate and deliver information resources in a variety of formats)
- Goal IV (Staff, manage and lead libraries and information centers of all types), specifically IVb (explain and apply management principles, processes and practices including those relating to innovation and strategic planning as well as human resources, financial, and operational functions of a library or other type of information organization)

Class schedule

October 29: What is Technical Services (and what gets lumped in with technical services anyway)? Tech services: more than just cataloging.Technical services competencies for Watson Library staff. Introduction to working in Sierra ILS. Create lists bootcamp/global update. The catalog ecosystem. Legacy catalog issues. Cataloging and processing workflows. Offsite selection.

November 5: Discussion of article. Hands-on: acquisitions; the process of selecting and ordering monographs for a library. Lecture/demonstration: receiving books (shelf-ready and non), loading shelf-ready records from vendors. EDIFACT invoicing. Hands-on: selecting and ordering from vendors (GOBI, Torrossa, Bookfinder), shelf-ready vs. non, EDIFACT vs. pcard.

November 12: Discussion of article. Hands-on: copy cataloging in Sierra. Guest lecturer: Kenneth Soehner, Chief Librarian, Watson Library

November 19: Discussion of article. Review of cataloging records created in previous class. Discussion of Systems/Tech Services crossover; MarcEdit, record loading, ERM implementation. Guest lecturer: Alan Behler, Systems Librarian, Watson Library (and Palmer grad)

December 3: Discussion of articles. Discussion of MarcEdit data transformation assignment. Using MarcEdit and Excel for data transformation. Serials: ordering, claiming, binding. Ordering supplies. Review of technical services competencies. Guest lecturer: Ross Day, Acquisitions Librarian, Watson Library