CollaboraTeS Toolbox
Collaborative Technical Services

Cross-Institutional Cataloging Workflows

Communicating Resources to be Cataloged

- Deliver actual resources in person, via courier service, or mail. Represent the items in the catalog with brief that records indicate that they are part of a collaborative cataloging project.
- Transmit print or photocopied surrogate via courier service, fax or mail.
- Deliver scanned surrogate electronically via email, social network site.
- Send digital images electronically.

Transmitting Cataloging Records

Option A
- The cataloging institution uses one of the receiving institution's OCLC authorizations to place records in a save file.
- The receiving institution updates the record and posts holdings.
- Cataloging credits are earned by the receiving institution.

Option B
- The cataloging institution uses its own OCLC authorization to create and update records, but does not post holdings.
- OCLC #s can be transmitted via spreadsheet.
- The receiving institution posts holdings.
- Cataloging credits are earned by the cataloging institution.
- Holdings can be batch-loaded with the cataloging institution communicating the needed OCLC #s.

Option C
- The cataloging institution uses a special OCLC agent authorization.
- Cataloging credits are earned by the cataloging institution.
- Holdings can be posted at point of update by cataloging institution.

Option D
- Cataloging institution sends batches of records via FTP or email.

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http://platinum.ohiolink.edu/dms/collaborate/