

## **Barcoding on Receipt workflow: Spring 2009**

### **Background**

As we enter the heavy spring receiving season and we are preparing to close out the fiscal year with shipments fully arrived and paid in Aleph, we are implementing temporary macro revisions that will allow Receivers to barcode materials for HD upon receipt as part of the acquisitions workflow. This year, because of the Backlog Elimination Project in Materials Management, no new materials may be sent to the Cat Stacks and an alternative storage location must be provided for these materials.

**Applies only to single-volume print monographs not received on series standing order.**

### **Workflow Revision**

When cataloging upon receipt is not manageable for all new titles while we close out the fiscal year, the following workflow will be implemented in all divisions as necessary:

Receiving macros in each division will be modified to omit the step of printing the Arrival Slip. After the Arrival and payment of the item is completed, the Receiver will run a macro that will present two choices:

- 1) The default choice of modifying the item for HD will prompt the user to scan a barcode, replacing the system-supplied barcode in the item record. The macro will also update the Collection code, Item Process Status and Remote Storage ID to Harvard Depository values, add a Reporting code to the Statistic field, and create a minimal holdings record linked to the Item Record.
- 2) Print an Arrival Slip. Works-in-parts, materials for the Widener Stacks, and non-print materials are examples of items that are ineligible for routing to HD with this macro. Printing an Arrival Slip will be the appropriate choice for any materials that are routed internally within a division for cataloging.

### **Physical Processing**

In addition to applying a physical barcode to the book, an HD sticker must be affixed, and the item charged to the Shelf Prep pseudopatron or placed In Transit to HD. Normal routing to the End Processing truck or HD Paperbacks truck remains unchanged.

### **Copy Cataloging**

When processing items for which we have already purchased cataloging copy (MarcNow and Casalini), please copy catalog the item before sending it to End Processing. For these and other situations when staff have time for copy cataloging before routing the book to End Processing,

the user may proceed to evaluating the bib record and editing the holdings record using the usual cataloging macros.

### **Statistics**

If copy cataloging is not performed and items are barcoded on receipt as part of the Acquisitions process, statistics should be kept as usual for the Acquisitions activity. No cataloging statistics should be recorded at this time unless cataloging is performed and the holdings record is finalized.

### **Reporting Follow-Up with OIS**

The Reporting code that is inserted in the Statistic field of the modified item records will allow us to create reports on the materials sent to HD during this modified Receiving workflow. The code is 'acq' followed by the processing date in YYMMDD format.

Automated batch processes are being devised with OIS so that updates to holdings records will occur. Under consideration are: moving Call numbers from the bib records to the 852 field of the holdings record, adding an H08 field, and adding an H10 field with the basic collections counts needed for accurate collections statistics.

Batch searching reports will also be generated for match and overlay, and to identify future cataloging needs.

### **Patron Access to these Materials**

Books processed for HD in this barcoding workflow will be available to patrons via the Request link from the HOLLIS Catalog. Users will have direct access to new titles without the delay of staff-mediated requests from the Cat Stacks.