Workflow and procedures for Dewey LAN CDs. July 25, 2012

The following procedures are related to the acquisition, processing, and mounting of CDROM products selected for the Dewey LAN. A CDROM designated as a Dewey LAN CDROM is implicitly a reference item. Individual CDROM products may necessitate exceptions to these general procedures due to their updating process or license terms.

See the Appendix on page 4 for specific information on each of the three currently subscribed (STO) Dewey LAN CDROMs. Note that Dewey librarians have designated the three STO LAN CDROMs as Room Use Only.

1. At Point of Order [both monograph orders & initiation of new STOs]

   a. Selector flags a Dewey LAN CDROM by making a note on the order: “To be mounted on Dewey LAN. Notify fix-lib@mit.edu.”

   b. If the selector knows there is a license associated with the CDROM, he/she mentions this on the order and may attach a copy. If possible, selectors should include mention of expectations regarding level of access (e.g., expect MIT use only, expect in house use only). If the selector does not include information about a license, ADE staff will determine if there is a license and obtain a copy.

   c. ADE staff refers the license to Ellen and copy Sally on orders so she can set up a Vera record for the item, whether it is licensed or not. Dewey Librarians desire public Vera records for CDROMs as a means of enhancing patron discovery (whether the products are licensed or not.)

   d. Ellen reviews and/or negotiates the license and consults liaison requestor as needed if license terms don’t seem to match any expectations on the order regarding level of access.

   e. Ellen reports back to ADE when license evaluation is completed and provides information for Vera record regarding license-related fields.

   f. ADE staff place a patron hold for the pseudo patron, Fix-lib, at the time of order. This serves as a mechanism to alert Olimpia or someone else in fix-lib when a LAN CDROM has arrived at Dewey. [Cassandra created an account for the pseudo patron Fix-lib on March 12, 2013.]

   g. ADE staff also note on order records: “To be mounted on Dewey LAN, Rush.”

   h. Vendors sometimes issue new editions of mono CDROMs. In these cases, the selector will initiate an order for the updated edition. The order should include relevant
information as indicated in section 1, a-b above. If appropriate, the selector should make explicit on the order that the previous edition should be cascaded off the LAN and should also notify Fix-lib. When the older edition has been taken off the LAN, the selector should notify Team Tangible along with instructions for withdrawal, relocations, etc.

2.1. At receipt in ADE [both mono orders & first piece of a new STO]

a. The IP status is changed automatically from “On Order” to “Rec’d/Not available” as part of the online arrival process.

b. If monograph, Amy checks in and adds a note to the record with the instruction to affix a special sticker to the CDROM jacket. The sticker bears the terms, “MIT only, Room Use Only, Dewey LAN.” Amy affixes the sticker to the jacket and flags the item as Rush. [Maggie Bloom has the template for this sticker.] Amy gives the item to Ben for cataloging.

c. If STO, at receipt of first piece, Czeslaw checks in and adds a note to the record with the instruction to affix a special sticker to the CDROM jacket. The sticker bears the terms, “MIT only, Room Use Only, Dewey LAN.” Czeslaw affixes the sticker and flags the item as Rush. [Maggie Bloom has the template for this sticker.] Czeslaw gives the item to Ben for cataloging.

2.2. At receipt in ADE [STO update pieces only]

a. If an STO, at receipt of subsequent update pieces, Czeslaw checks in, places a Hold for Fix-lib, affixes special sticker (“MIT only, Room Use Only, Dewey LAN”), flags the item as Rush, and forwards to CPS for shelf prep.

**Note exception:** Morningstar Principia Mutual Funds Advanced does not require a “Hold for Fixlib” note. See the Appendix for details.

3. At Tangibles Cataloging [both mono orders & new STOs]

a. Ben catalogs and makes note indicating, “For use only at workstation in Dewey Library,” so that public record will inform users.

b. Ben forwards CDROM to CPS for shelf prep.
4. At Curation and Preservation Services [both mono receipts and all STO receipts]
   
   a. CPS shelf preps as Rush and according to usual procedures for CDROMs. (The LAN CDROMs receive an insert with the title of the item fitted to the spine of the jacket. CPS has templates for the inserts.)
   
   b. When shelf prep is completed, CPS routes CDROM to Dewey.

5. At Dewey Circulation Desk [both new mono receipts and all new STO receipts]
   
   a. IDLA staff receives the CDROM and removes the IP status (ie., “received, not available”). Status becomes “In library.” The CDROM is checked in, at which time the status changes to “on hold.” An “on hold” email is automatically generated to the patron, in this case, the pseudo patron, Fix-lib.
   
   b. IDLA staff place CDROM on the Dewey hold shelf for patron Fix-lib. IDLA staff will ignore the usual “held 7-days only rule”.

6. At Fix-lib [both new mono receipts and all new STO receipts]
   
   a. Olimpia (or her surrogate) receives Fix-lib email (“Item held for you”), comes to Dewey, checks out the CDROM, and carries out installation on LAN workstation.
   
   b. After the installation, Olimpia returns CDROM directly to IDLA staff. IDLA staff checks CDROM back in. The CDROM will now have “in library” status. Item is then shelved at Dewey CD collection.
   
   c. Olimpia emails dewtalk@mit.edu that the CDROM on the LAN has been updated if an STO or added if a mono.
   
   d. **Note exception:** Morningstar Principia Mutual Funds Advanced does not generate a Hold for Fix-lib note. A disc is not needed to update the item on the workstation. See Appendix for details.

Appendix – STO CDROMs at Dewey Library (Item descriptions and process exceptions)
As of April 2013, there are three STO CDROMs on the Dewey LAN. For various reasons their handling and processing cannot be standardized for each step in the workflow. Exceptions noted below. The loan rules for each title were approved by Dewey librarians in April 2013.

INDUSTRIAL STATISTICS DATABASE  
http://library.mit.edu/item/000958253 HD2329.U56  
EXCEPTIONS:  NONE.  
CDROM is updated once a year. Olimpia needs the current CDROM to update the software. Data is also mounted on workstation at time of update.  
LOAN RULE: Room Use Only [2-hour loan]. All discs.

MORNINGSTAR PRINCIPIA MUTUAL FUNDS ADVANCED  
http://library.mit.edu/item/001112329 HG4530.M677  
EXCEPTIONS: YES.  
No hold for fix-lib needed at time of receipt of update disc.  
Product is updated on LAN via a download from net. Sally receives monthly email announcement from vendor that update is ready for downloading to workstation. Sally emails fix-lib. Sally also receives email that tangible CDROM is on the way. Czeslaw receives CDROM and processes but without placing a hold for Fix-lib. Olimpia does not need the CDROM to update software on LAN workstation.  
LOAN RULE: Room Use Only [2-hour loan]. All discs. Current data must be used on designated Dewey LAN computer; archived discs/data must be accessed on a second designated Dewey LAN computer.

WORLD TELECOMMUNICATION/ICT INDICATORS  
http://library.mit.edu/item/001667727 HE7631.W66  
EXCEPTIONS:  NONE.  
CDROM is updated twice a year (June & Dec). Olimpia needs the current CDROM to update the software. Patron must request disc from Dewey Circ Desk in order to use the product on LAN workstation.  
LOAN RULE: Room Use Only [2-hour loan]. All discs.

mpb, 7/25/2013