**ECIP Workflow**

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**ECIP Catalogers**

1. **Create a BIBCO record: OCLC Connexion Client**
2. Login OCLC Connexion Client under your OCLC authorization
3. Select the shared ECIP local save file as default
4. Go to LC Traffic Manager
5. **Create a BIBCO record: LC Traffic Manager**
6. Login to LC Traffic Manager : <https://ecips.loc.gov/pls/ecip/cats_signon>
7. Click on “New Work” on the Work Menu Screen to display new receipts
8. In the “New Work” Screen
   1. R: “R” (in red) indicates materials flagged as RUSH
      * “R” is usually flagged by CIP staff if a title hasn’t been cataloged in three weeks
      * Occasionally, a rush note provided by the publisher is in Data View page
   2. Date: Date when the ECIP was first forwarded from the CIP Division
      * If Date in red indicates that the ECIP is at least two weeks old
      * If Date highlighted in yellow indicates that the ECIP is at least four weeks old

Local priority in order as follow: Rush, Date in yellow, Date in red, regular



1. Choose a title and inform other ECIP catalogers the title you choose to catalog
2. Click on a title and get into the page of “Data View : CIP”
3. Review the page of “Data View: CIP”
4. Perform dup search in OCLC before using the TCEC for cataloging, use “ForwardCIP” to send record back to CIP contact person, if
   * + A title indicate that it is another volume of a set (possibly cataloged already)
     + A title bounced back by a LC team (check History section in Data View)
5. Use “Email” in the Data View if needing to send an inquiry to the publisher for clarification
6. Click on “TCEC” in the page of “Data View: CIP” to initiate descriptive cataloging. This step brings up the “On-The-MARC” program which captures descriptive elements from the galley to create the bibliographic record. Watch training video for the process: [http://www.loc.gov\catdir\cip\OnTheMARC.avi](http://www.loc.gov/catdir/cip/OnTheMARC.avi%20)
7. Click on “Send” once descriptive cataloging is completed. The record will be sent to OCLC default local save file that you pre-set.
8. Close “On-The-MARC” and click on “Sign Off” to close LC Traffic Manager
9. Go to OCLC Connextion
10. **Create a BIBCO record: OCLC Connexion**
11. Open the shared ECIP local save file
12. Find the record you created in LC Traffic Manager and finish descriptive cataloging of the record
13. Perform NACO work, assign LCSH and LCC (class number only, no shelflisting)
14. Set the status “[cataloger initial] Ready, NACO #” for review
15. ECIP coordinator will review the record, provide feedback as needed, and send records to LC
16. **Distribute records to a LC ECIP Cataloging Team**
    1. Receive LC notice via email that the records are received by CIP staff
    2. login on LC Traffic Manager
    3. Click on “New Work”
    4. Select the title to be distributed and get into the page of “Data View : CIP”
    5. Click on “Forward TM” on the left side
    6. Select a [LC Team](https://www.loc.gov/publish/cip/partners/teamscope.html) for “Forward Destination” based on LC classification assigned
    7. Choose “Shelflisting Only” and click “Send”
    8. Delete the OCLC record from the shared ECIP local save file in OCLC Connexion after the record distributed

**BIBCO/ECIP Coordinator:**

1. **Monitor ECIP records:**
   1. Monitor ECIP records via LC Traffic Manager daily to see any records added or bounced back
   2. Monitor ECIP records via OCLC Connexion shared ECIP local save file by checking “My status” to see if any records are ready (sometimes catalogers send email notification)
2. **Review ECIP and associate NACO records: OCLC Connexion**
   1. Open Programs: Login to both LC Traffic Manager and OCLC Connexion
   2. Record ECIP Record in Excel File (for statistics purpose): Cataloger initial, LCCN, ECIP title, Bib Count, NACO count, Date for transaction file, for example



* 1. Begin the review and pay more attention to the following:
* Check and match 010 in Traffic Manage record and OCLC record.
* Pay attention to the following elements:
  + Check ECIP encoding 8 (tends to mixed with BIBCO blank),
  + 008 Dtst “s” vs. “t” along with Date 1 and Date 2
  + Check 050 indicators (tends to mixed with BIBCO 050 04) and class numbers with extension, translation, etc.
  + 245 indicators
  + 264\_1 date in “[]” and without ending period if date is inferred
  + 264\_4 copyright date if shown on TP plus page on LC Traffic manager and coded t in 008
  + Capitalization rule in 245 and 505
  + 300 pages cm—with ending period if series statement is presented
  + Change to single quotation mark for quoted phrase within quoted 520 note
* Pay attention also to potential possibility of whether to need an AAP for work and expression.
* Consult cataloging instruction as needed: RDA, LC-PCC PS (on ECIP), ECIP manual (under DCM) in Cataloger’s Desktop, LC Traffic Manager Manuals (on confluence), BSR, BPM.
  1. Provide feedback to catalogers as needed

1. **Prepare and submit ECIP records to LC**

**(DO NOT CONTRIBUTE ECIP RECORDS TO OCLC.** LC will contribute the records to OCLC)

1. Create a distribution file with file name UCSDyyyymmdd [e.g. UCSD20140530]
2. Copy ECIP records to the distribution file
3. **COPY** (not move/transfer) the distribution file to P:\LOC-Dropbox\submit, file will be automatically picked up within an hour or so
4. Save a file of accumulated distributed records which can be used occasionally when receiving feedback from LC CIP staff on subject cataloging
5. **Change Requests**
6. Send an email message to LC CIP contact person if a record needs correction, providing LCCN, Title, and correction to be made
7. Receive feedback from LC CIP staff occasionally on subject cataloging for a title, consult ECIP catalogers and respond back to LC CIP staff
8. **Other tasks**
   1. Provide trainings and Answer questions about BIBCO/ECIP cataloging
   2. Send inquiries to LC CIP contact person concerning ECIP cataloging