

## State Publications General Workflow and Illustration

The following is the general workflow completed by Reference, Cataloging and TDA staff when a publication comes in. The steps are generally followed in the order, although specific could change based on the particulars of a publication. The first page is a bulleted listing of steps, the second is an illustration of the steps using more concise language.

1. Agency submits publication to reference staff
2. Reference reviews publication and vets as official copy
3. Reference determines additional specifications needed for publication in catalog/tda
4. Reference forwards publication and specification request to cataloging
5. Cataloging reviews publication and determines how to catalog
  - a. Does catalog record for print exist?
    - i. If yes,
      1. Cataloging will determine if records need to be updated to RDA and/or monograph records collapsed into serial record
      2. link to publication in the TDA will be added to catalog record.
    - ii. If no, new record will be created for electronic TX document
  - b. Catalog record is exported in XML from OCLC and edited for TDA specifications
6. Is this a new agency?
  - a. If yes
    - i. Cataloging sends tda staff desired agency name and collection code (affects sort order)
    - ii. TDA staff creates Agency collection and assigned appropriate thumbnail
  - b. If no, proceed to next step
7. Is this a new publication type within the Agency
  - a. If no, proceed to the next step
  - b. If yes
    - i. Cataloging prepares a metadata file for the publication type, forwards to tda staff with desired collection code and publication type name
    - ii. TDA staff reviews supplied metadata for errors, creates publication type collection, assigns appropriate thumbnail
8. Cataloging creates metadata file for the directory holding the publication and for the publication itself. These 2 match, but have different filenames
9. Cataloging submits the publication directly into the TDA in the appropriate publication type for the agency
10. Cataloging checks upload successful and metadata files paired appropriately to the publication/folder
11. Cataloging inserts a link into the sirsi catalog record for the publication (at the type level not the individual item)
12. Cataloging adds items records for digital documents in SIRSI.
13. Cataloging notifies Reference that publications have been added.

## State Publication Workflow illustration

