Welcome to the
TRAIL Information Session

SLA, June 8, 2014, Vancouver, BC

Introductions

Mel DeSart
Head, Engineering Library
Interim Head, Branch Libraries
University of Washington

Current Chair of TRAIL (2013-2015)

Other TRAIL reps

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Value of Technical Report Literature

- **There is value to researchers:**

  - **They communicate research in technology and science**
  - **They deliver technical information to industry and research institutions, contributing to the continued growth of science and technology**
  - **They contain valuable information serving specialized audiences of researchers**

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Common Problems associated with Technical Report Literature

- **Inconsistent or differing dissemination practices**

- **Multi-format collections; across multiple physical locations**

- **Poor quality media distribution; unusable pieces**

- **Limited bibliographic access and control.**

- **No title level cataloging – series level records with no holdings**

- **Most not available electronically; nor available through ILL**

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Solution To The Problems Associated With Technical Report Literature: TRAIL

- **Began as a GWLA collaborative project with the Center for Research Libraries**

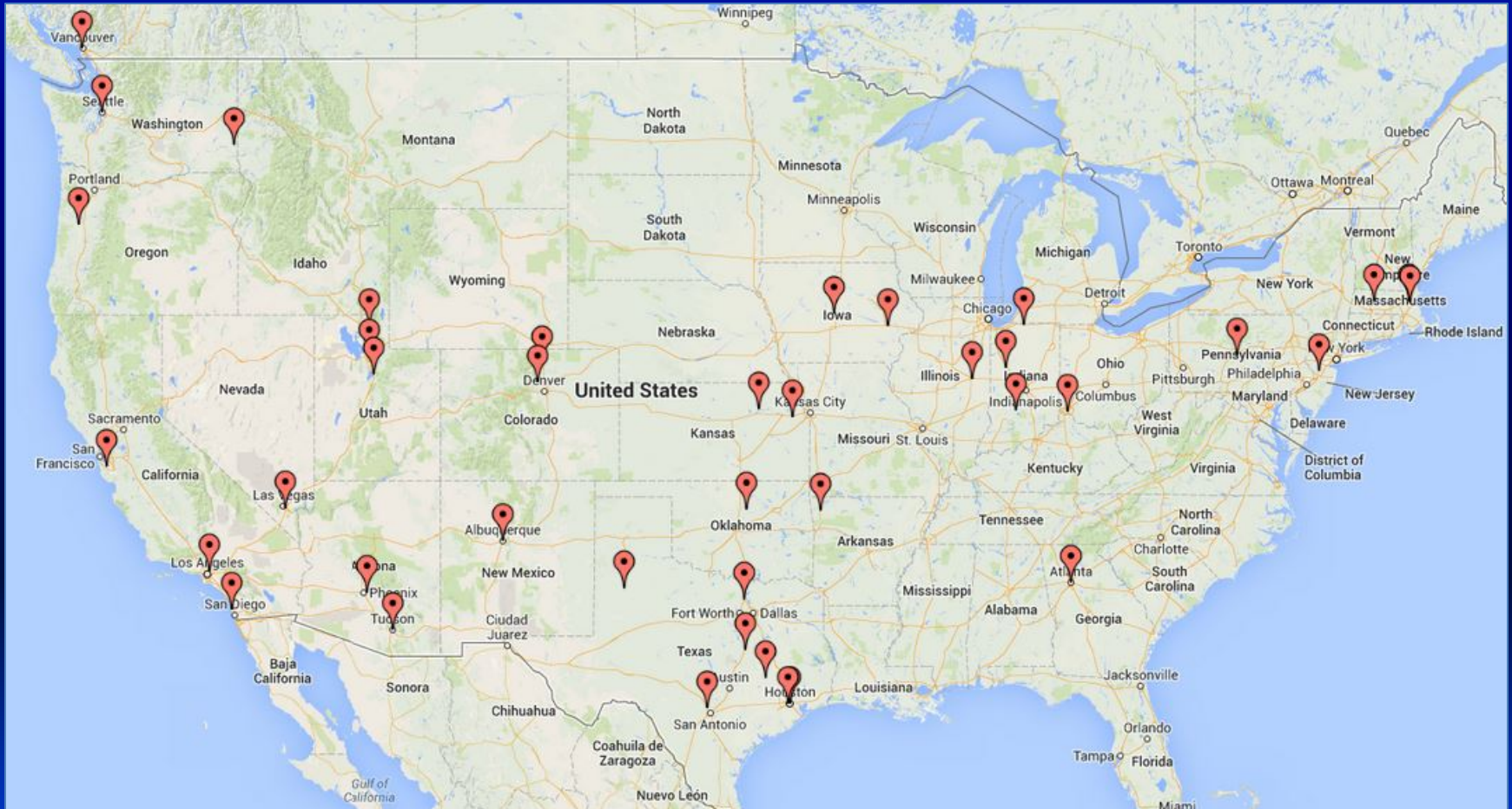- **Developed into a CRL Global Resources Network Initiative**

Mission

To ensure preservation, discoverability, and persistent open access to government technical publications regardless of form or format

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Fulfilling the Mission

- **IDENTIFY, ACQUIRE, CATALOG, AND DIGITIZE PRIMARILY PRE-1976 TECHNICAL REPORTS**

- **PROVIDE UNRESTRICTED ACCESS TO THESE DIGITIZED TECHNICAL REPORTS THROUGH THE TRAIL SEARCH INTERFACE**

- **IDENTIFY & INVESTIGATE THE LONG-TERM PRESERVATION POSSIBILITIES OF THIS UNIQUE BODY OF LITERATURE**

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Current Member Institutions

The Public Side of TRAIL: The Search Interface

http://www.technicalreports.org

TRAIL Information on the CRL Website
Members use this website to promote the work of TRAIL

http://www.crl.edu/grn/trail/

- Why join
- How to join
- FAQs
- History

- Digitization in progress
- Reports needed

Join Working Groups by contacting a coordinator

Events

Find us on Social Media

The "Behind the Scenes" Side of TRAIL
or
Workflow: How Content Moves Across The Country

Technical Reports are assembled & organized at institutions across the country before being sent to the University of Arizona.

The University of Arizona is the central processing site and is routinely referred to as "Central" by TRAIL members.

"Central" or The University of Arizona

- **receives shipments, assembles collections, and creates inventories in the TRAIL Processing Database**
- **creates catalog records for each technical report and supplies the cataloging to OCLC**
- **ships processed technical reports to either the University of Michigan or the University of North Texas for digitization**

Members Coordinate the Work of TRAIL

- TRAIL Steering Committee
- TRAIL Collections Working Group
- TRAIL Communications Working Group
- TRAIL Processing Working Group
- TRAIL Membership Working Group

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Steering Committee

Purpose:

The TRAIL Steering Committee is the principal body that shall consider and formulate the policies and procedures governing TRAIL in accordance with the recommendations of the membership.

Composition (not fewer than 8 members):
- Elected Officers: Chair, Vice-Chair, Secretary, Treasurer
- Working Group Coordinators
- Additional members from the membership, appointed by Chair
- Ex Officio members (CRL rep, past-chair)

Terms:
- 2 year terms
- Must have served on a Working Group for at least one year prior

Meetings:
- Biweekly
- Annual Meeting (each spring), open to all members

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Collections Working Group

Purpose:

- Develop and maintain lists of possible content
- Investigate series, collections, and agencies
  - Each series under review must be researched for
    - Technical content
    - Physical features: Format & Size
    - Publication parameters:
      - When
      - How much
      - Publication list?
    - Agency information
      - Currently active?
      - Currently digitizing older materials?
- Determine digitization priorities
- Solicit content
- Organize shipments
- Review series digitized for completeness

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Collections Working Group
(continued)

Composition:

Engineering Librarians

- Focus on the technical content
- Search for series/resource we have used and are used by researchers

Government Document Librarians

- Know the organization of government resources
- Have control of collections
- Know the people at the agencies

Communications Working Group

Purpose:

- Provide content for the CRL TRAIL website
- Assist other working groups with communication development
- Answer/refer queries posed to the TRAIL website to the appropriate member(s)
- Monitor funding opportunities
- Monitor opportunities for promoting TRAIL
- Maintain the history of TRAIL
- Other duties as assigned by the Steering Committee & Working Groups

Composition:

- Engineering Librarians & Government Document Librarians

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Processing Working Group

Receive and prepare all materials for scanning
- Sort special handling materials
- Disbind volumes when necessary
- Flag items for scanning
- Barcode all items (for scanning with Google)

Provide inventories of all received materials
- Provide overall inventory
- Provide inventory at box level (for scanning)

Provide original full MARC (i-level) cataloging for items
- Update pre-existing records
- Record OCLC numbers for all items

Processing Working Group

Work with OCLC
- Cataloging best practices

Official contact with the University of Michigan/HathiTrust and Google
- Shipment/Scanning processes
- Scanning/Deposit reconciliations
- Monitor public domain clearance in HathiTrust

Manage outsourced scanning for special format materials
- Prepare / ship
- Quality control checks
- Deposit with University of North Texas
- Cataloging of electronic items

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Membership Working Group

Purpose:

- Recruit new member organizations for TRAIL
- Orient new members
- Communication with TRAIL members

Composition:

- Engineering Librarians & Government Document Librarians

TRAIL Financials

TRAIL's budget comes almost entirely from its member dues. At (presently) 40 members and $3000/year/member, TRAIL's annual budget is currently $120,000/year.

TRAIL's costs had historically included:

- Cataloging costs at the University of Arizona
- Shipping costs associated with moving material from donating libraries to Arizona for cataloging, then from AZ to UNT or Michigan/Google
- Administrative support costs to CRL

Future Directions

- Form a task force to address funding possibilities (identify appropriate granting agencies and other funding opportunities and work with CRL when appropriate on applying for external funding)

- Explore possible partnering opportunities (content, discovery, funding, etc.)

- Identify publicity opportunities for TRAIL (institutional web pages, libguides, etc.)

- Develop standards for, and experiment with, scanning from microfiche and microcards. If successful, develop standards for acquiring non-print collections for digitization.

- As an assessment measure, design and distribute two surveys, one to collaborators and one for users

- Better document, improve, and coordinate the workflows of TRAIL and its partners

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Public Response to TRAIL
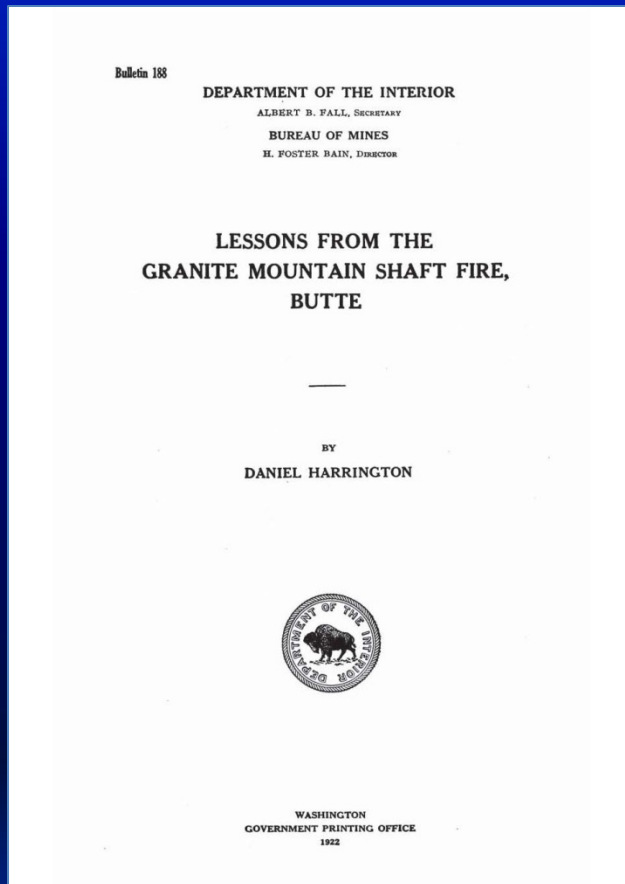
"Thanks for providing this old bulletin online! I know that many people are interested in USBM documents, including my researchers, and usually the preference is for digital copies. You might get quite a few hits on these old docs."

Public Response to TRAIL

"The 25 year old copy of the monograph that I have was destroyed by water . . . finding it online makes me very happy! Please pass on my great appreciation to all those who have put together this very valuable service."
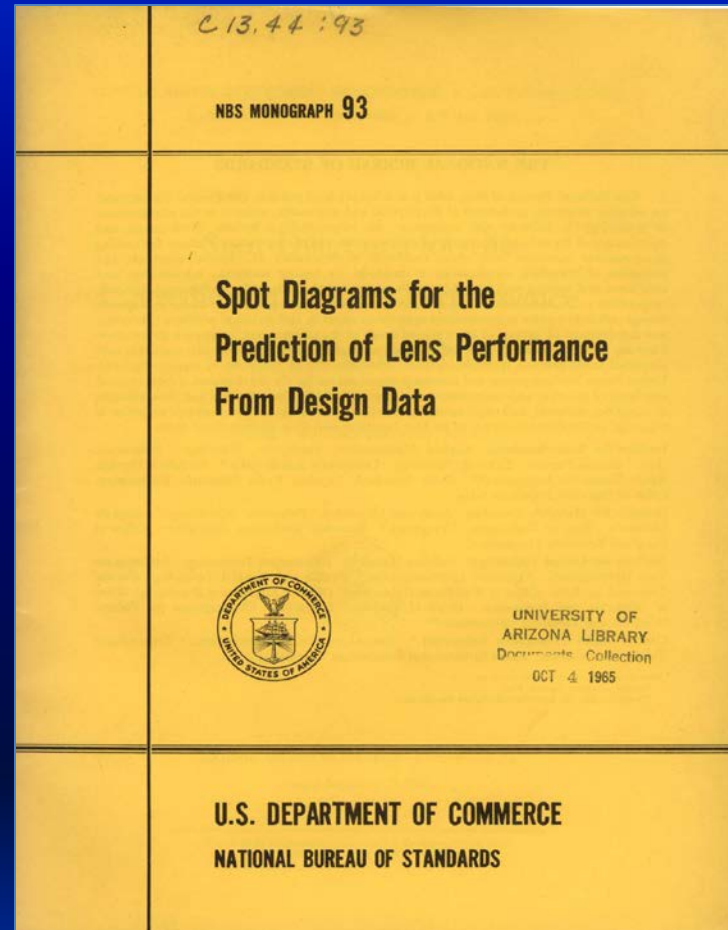
QUESTIONS & COMMENTS

Thank you for taking the time to learn more about TRAIL.

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