Dynamic Cataloging

adjusting to new resources and new expectations for catalogers

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Unreasonable demands?

- “Ideally, ALL the individual e-books and e-journals available to our patrons should be in the catalog.”
  - 14,000+ full text titles in the Ebsco databases
  - 6,000+ OhioLINK e-journals
  - 5,000+ full text titles in LexisNexis
  - 4,000+ miscellaneous e-journals
  - 14,000+ NetLibrary books
  And many more...
Unreasonable demands?

- “The library owns print copies of 3,800+ National Bureau of Economic Research Reports. We just figured out they’re all available online. Why aren’t there web links in all the Marc records?”
- “50 or more new National Bureau of Economic Research reports are released online every month. Shouldn’t they all be in the catalog too?”
Unreasonable demands?

- “One faculty member just said she didn’t understand the wording of the clickable text in these links! Can you use different words?” (This wording appears in 1,100+ Marc records and has been in them for several months with no complaints.)

- “A new regional campus just subscribed to JSTOR! This requires changing the proxy server redirects in 600+ Marc records...”
Unreasonable demands?

- “We want all the electronic resources that can be considered ‘reference sources’ to have a reference collection location code in the catalog. And we want to be able to print out an inventory of them, in LC call number order.”

(Our cataloging department had a tradition, established without public service input, of deleting the LC call numbers from all e-resource records)
Dynamic Cataloging Means: Increasing Efficiency

Existing cataloging systems often have built-in ways to make the computer perform repetitive tasks for you:

- Millennium Global Update
- OCLC Macro Language and constant data
- MarcEdit (word processor specifically for Marc records)
Dynamic Cataloging Means: Increasing Efficiency

Windows automation software can allow even more sophisticated automation of repetitive tasks

- Perfect Keyboard Lite
- MacroExpress
Dynamic Cataloging Means: Increasing Efficiency

- Make sure staff know what software and technological aids are available to them.
- At least one staff member should make efforts to keep up with new software and features (with supervisor’s support).
Dynamic Cataloging Means: Focusing Descriptive Efforts

- Access-level records concept
  - Somewhat simplified Marc record
  - Emphasizes “subject/content oriented fields” – titles, authors, subject headings
  - De-emphasizes technical codes that have little significance for the user
Dynamic Cataloging Means:
Focusing Descriptive Efforts

Concentrate on what’s important for providing patron access

**BUT...**

Find out what **IS** important. Don’t assume catalogers know what patrons and librarians need — consult other stakeholders.
Dynamic Cataloging Means: Following Up

- E-journal aggregators have unstable publication lists
- What was available online one day, might not be available the next
- You can’t just catalog a title and forget about it forever!
Dynamic Cataloging Means: Following Up

- Use Innovative “create lists” or similar function to get a list of all the links from the catalog to a particular journal aggregator.
- Compare the holdings in the catalog to the aggregator’s title list on a regular basis.
- Take advantage of aggregators that offer accurate, timely content updates.
Dynamic Cataloging Means: Following Up

- The more detail you have in catalog records for e-resources, the more likely you are to have to change them in the future.
- Accept the need to change your past work, even delete or suppress catalog records—no matter how much time you originally spent on them.
Dynamic Cataloging Means: Being Flexible

Old mindset:

“This department has to have a SINGLE written policy for cataloging ALL e-books.”
Dynamic Cataloging Means: Being Flexible

- New reality:
  - Vendor-supplied records are available for some e-books, but not for others
  - Sometimes it makes sense to just add a web link to the record for the print version
  - Sometimes it makes more sense to have separate records
Dynamic Cataloging Means: Being Flexible

Catalogers’ professionalism is no longer defined by following lots of complex and rigid rules, but...

- By being able to find the most efficient, effective ways to provide access on a case-by-case basis, and...

- By balancing the various components of the “big picture” – cataloging new items, checking accuracy of old records, etc.
Dynamic Cataloging Means: Enlisting Outside Help

Vendor-supplied records are a “must-have” for large title sets.

- Free records available from publisher/aggregator or OhioLINK
- Commercially purchased records, e.g. from Serials Solutions
- And if the cataloging isn’t 100% perfect – it’s probably much better than nothing!
Dynamic Cataloging Means: Enlisting Outside Help

A good student employee can perform many basic tasks.

- Creating “quick and dirty” short form catalog records for e-resources (e.g., a Marc record for an e-journal consisting of just the title, ISSN, and web link)
- Checking publisher/aggregator title lists for added and dropped titles
- Checking links
Enlisting Outside Help

Public service staff can carry their weight.

- “You want reference location codes added to all the electronic ‘reference sources’ the library has access to? Here are the 3,000+ databases and web sites currently in the catalog. Please let me know which ones you consider ‘reference sources.’”
Dynamic Cataloging Means:
Enlisting Outside Help

Public service staff can carry their weight.

- “If you want me to change the wording on these 1,100 links, I will ... But please take a few days to discuss it with your colleagues and figure out what the best new wording is.”
Dynamic Cataloging Means: Establishing Priorities

- Having policy statements can help
  - E.g., “Paid-for materials get cataloged before free web resources”

- But don’t fall into the trap of trying to apply policies that are only suited for physical materials
  - E.g., “No old catalog records can be revised until after all new materials are processed”
Dynamic Cataloging Means: Establishing Priorities

If catalogers are being pressured to take on extremely large or dubious cataloging projects:

- Catalogers should feel comfortable referring the request to their supervisor
- Supervisors must be willing to learn about the issues involved and make informed decisions
Dynamic Cataloging Means: Establishing Priorities

- Focus on the projects that will do the most good for the most patrons, rather than on pleasing “squeaky wheels”
- It might help to have a high-ranking individual ready to make unilateral decisions if groups of stakeholders are unable to reach consensus
Resources


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  - Chapter 5: Quality cataloging with less
  - Chapter 6: The name and role of the cataloger in the twenty-first century
  - Etc.
Resources

- Millennium Global Update and other advanced Innovative features:
  - http://csdirect.iii.com/
  - http://www.innopacusers.org/

- OCLC macro language:
  - http://users.rcn.com/aardy/oml/lessons/
Resources

- Perfect Keyboard Lite
  http://www.pitrinec.com/drorder_pk.htm
- Macro Express
  http://www.macros.com/
- MarcEdit
  http://oregonstate.edu/~reeset/marcedit/