SIMULATING THE FUTURE: A CONSORTIAL CATALOG FOR CATALOGING STUDENTS

Dom Bortruex

Core Competencies & Education for a Career in Cataloging Interest Group

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ABOUT ME

- Manager of Metadata & Resource Description at American University

- MLIS Instructor at Kent State University's School of Information, College of Communication & Information

- Workshops

CATALOGING EDUCATION

MLIS PURPOSE

- Prepare students for a career in LIS.
  - Theory and practice
  - Confidence
  - Inclusion in library community

- "Employment of librarians and library media specialists is projected to grow **5 percent** from 2019 to 2029, faster than the average for all occupations. Communities are increasingly turning to libraries for a variety of services and activities. Therefore, there will be a need for librarians and library media specialists to manage these resources and to help patrons find information."
  - Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook*, Librarians and Library Media Specialists, at https://www.bls.gov/ooh/education-training-and-library/librarians.htm (visited *June 29, 2021*).

CATALOGING JOBS

Examples of qualifications in Librarian positions (requiring MLIS) from ALA Joblist posts from July 2021

- Wyoming State Library, Bibliographic Services Librarian
  - "Has experience **using Integrated Library Systems and Library Services Platforms** with an emphasis on technical services."

- Salisbury University, Cataloging and Metadata Services Librarian
  - "Experience using an **integrated library or next generation system** such as Aleph, Alma, or OCLC WorldShare."

- Lehigh University, Cataloging Librarian
  - "A **strong cataloging background** will aid in quality control but should also be accompanied by a knowledge of **batch processes and tools** available to accomplish these processes, such as **MarcEdit**"

- San Francisco State University, Cataloging/Metadata Librarian
  - "Experience cataloging with **integrated library systems (ILS)**, preferably Ex Libris Alma."
  - "Experience with **metadata transformation** and **remediation tools** and techniques, such as **MARCEdit, OpenRefine**, or **scripting languages, batch record processing**, and **metadata crosswalks**.
  - "Experience with **linked data**"

CATALOGING EDUCATION

Common approaches

- Theory and practice

- Guest speakers, "catalog fieldtrips"

- Cataloging exercises
  - Spreadsheets
  - XML
  - OCLC Connexion
  - ILS, LSP
    - LIS 775 Technical Services Operations and Systems Fall 2016 John Lindaman

- metadata transformation

- Internships, practica

010	##	$a 2014012391
020	##	$a 9781442232457 (hardcover : alk. paper)
100	1#	$a Kelsey, Marie.
245	10	$a Cataloging for school librarians
264	#1	$a Lanham : $b Rowman & Littlefield, $c [2014]
300	##	$a xv, 299 pages : $b illustrations ; $c 23 cm
336	##	$a text $b txt $2 rdacontent
337	##	$ unmediated $b n $2 rdamedia
338	##	$ volume $b nc $2 rdacarrier

WHAT DO WE WANT TO TEACH?

Comments from https://alcts.ala.org/news/2018/e-forum-cataloging-metadata-education/

Introduce students to big concepts and terminology of the field.

Give students practical experience in addition to practical exercises—including activities such as shadowing, guest lectures from professionals, and possibly practica or internships.

Provide students with tools for further learning. Teach them how to use the tools of the trade, e.g. WebDewey and Library of Congress Authorities and Vocabularies.

GAPS AND OPPORTUNITIES

- ILS, LSP experience
  - workflows
  - beyond cataloging- holdings, items
  - maintenance, cleanup projects, analytics
  - batch loads/deletes
  - import profiles
  - normalization, merge rules

- Consortia catalog experience
  - local vs. shared
  - following consortia best practices
  - collaborating with other cataloging students

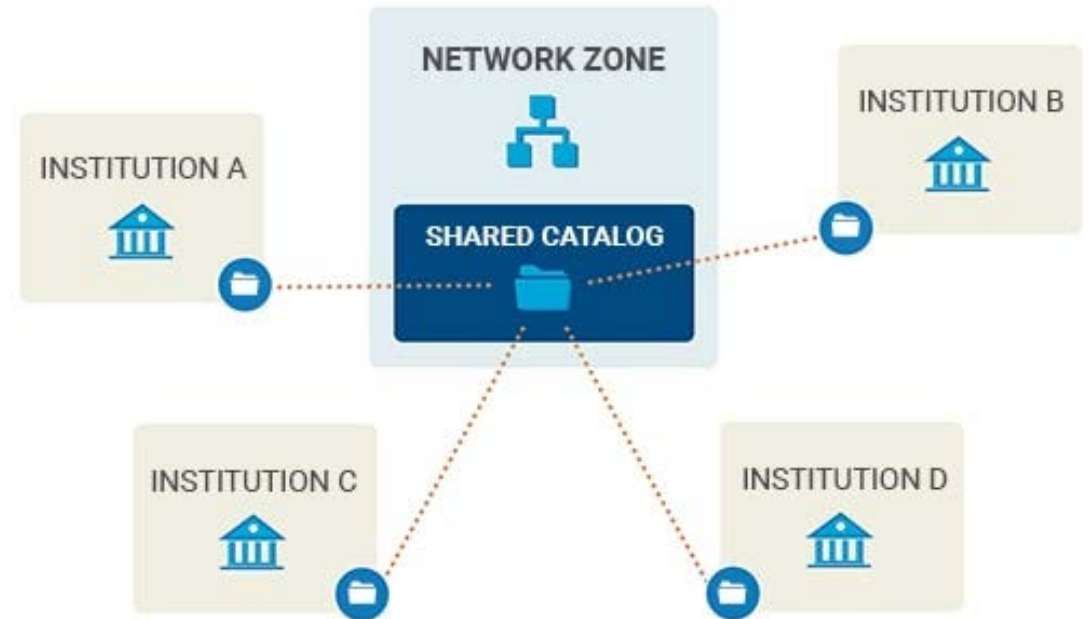- Apply theory beyond cataloging
  - system configurations
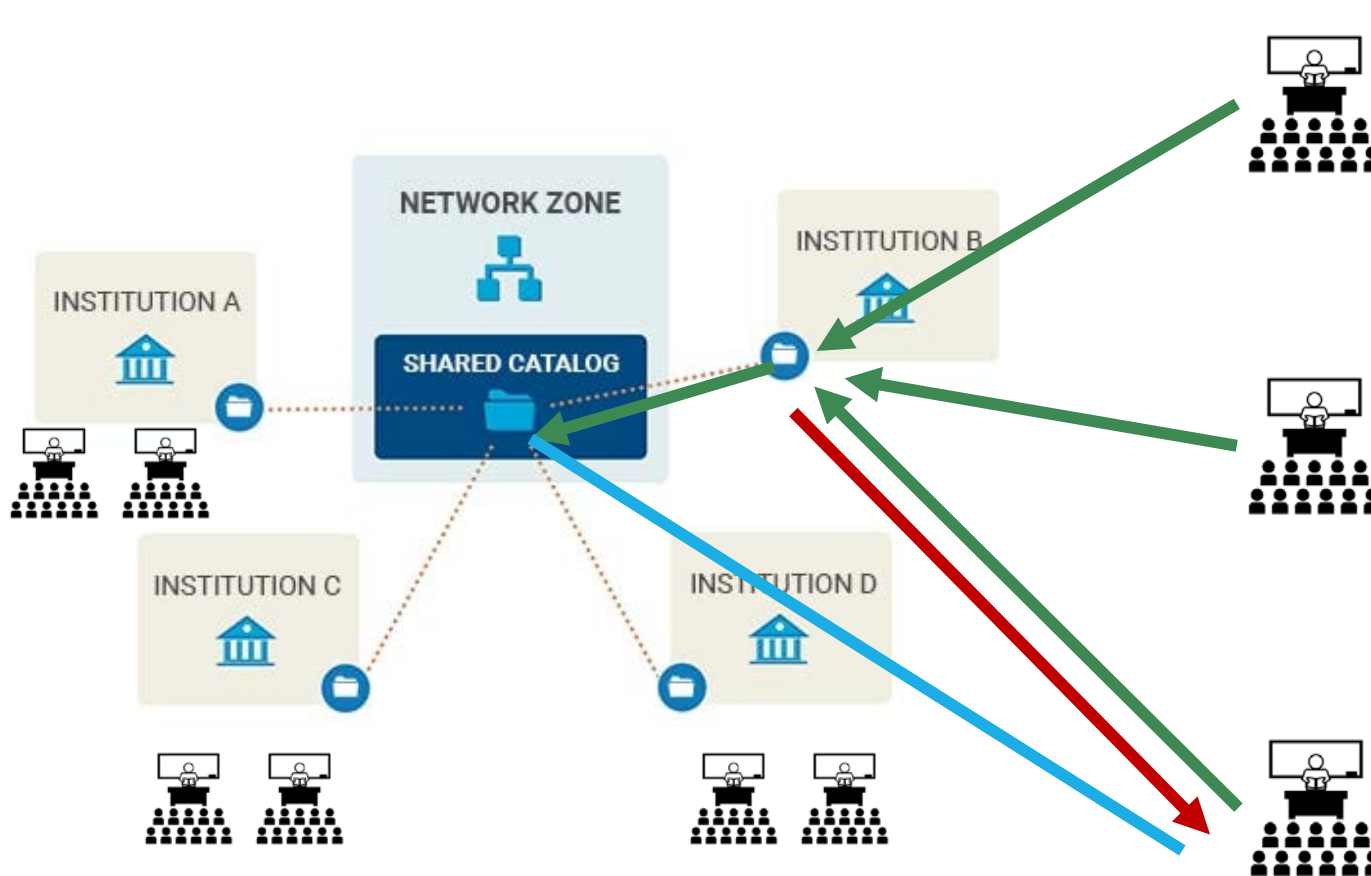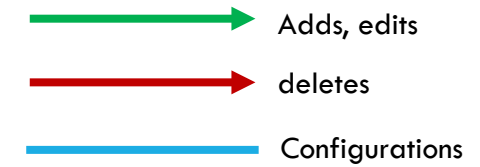
MLIS CONSORTIA CATALOG

Practical experience for future information professionals

LIS CONSORTIA

- A consortia of LIS programs that work together to simulate a shared catalog experience.

- LIS programs are consortia members.

- Instructors represent managers- distributing and reviewing work.

- Students function as catalogers, gaining experience in:
  - Cataloging in a local and consortia catalog
    - Potential to collaborate with other classes and consortia members
  - Catalog maintenance
  - Configurations and integrations
  - Linked data, cataloging trends

- https://exlibrisgroup.com/products/alma-library-services-platform/collaborative-networks/

SHARED CATALOG

Legend:
- Adds, edits (green arrow)
- deletes (red arrow)
- Configurations (blue line)

NETWORK ZONE

INSTITUTION A
INSTITUTION B
INSTITUTION C
INSTITUTION D

SHARED CATALOG

- Cataloging Course
  - Original cataloging
  - Copy-cataloging
  - Linked data
  - Holdings, items

- Catalog Maintenance Course
  - Reports, analytics
  - Cleanup projects
    - Normalization, indication rules
    - MarcEdit, OpenRefine integrations

- Information System Management
  - Import profiles
  - Batch imports/deletes of records
  - Analytics
  - Configurations
  - APIs

ASSIGNMENTS

Examples of possible assignments to give students practical experience

CATALOGING ASSIGNMENTS

- Building MARC records and cataloging experience

Module	Topics	Activity
1. Intro to cataloging	• background • description • representation	• Describe assigned resources
2. Standards	• AACR2 • RDA	• Apply rules to descriptions from Module 1
3. MARC Encoding	• Components • Structure	• Create MARC records in local catalog for resources from Module 2
4. Knowledge Organization Systems: Subjects & Classification	• LC Authorities • Alternative vocabularies • LC Classification • Dewey	• Add LCSH to records • Create and encode LC call numbers records • Control main, added entries • Add linked data URIs access points

5. Copy-cataloging	• Cataloging in shared catalog
	• Consortia best practices
		• Copy-catalog assigned records from shared catalog
		  • Full level
		  • Upgrade to RDA

CATALOGING/METADATA MANAGEMENT

Assignment	Description
Rules- indication, normalization	• Create indication rule to identify records that do not contain 3xx fields • Create normalization rule to add 3xx fields
Cleanup, enhancement projects	• Use normalization rules and MarcEdit integration to cleanup, enhance targeted areas of records
Record merges and overlays	• Perform merges and overlays in shared vs. local catalog
EBA workflow	• Identify and delete old EBA titles • Add new EBA records through import profile
Procedure, workflow documentation	• Create documentation for cataloging procedures

LSP SYSTEMS

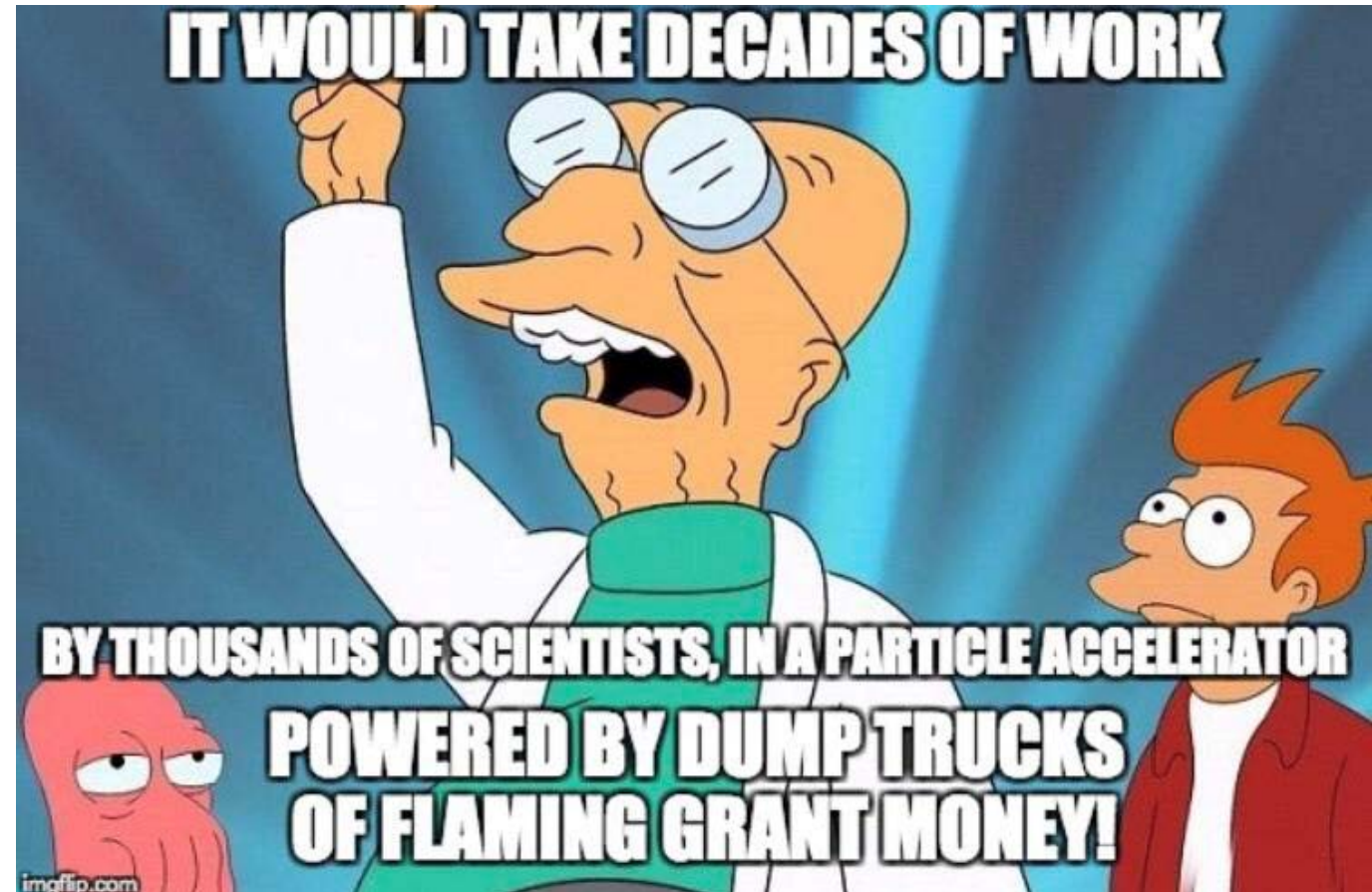| Assignment	Description
Analytics	• Analytics reports for targeted areas
APIs	• Setup APIs • Working with APIs • GET, POST, PUT, DELETE
Configurations	• Configure local fields • Shared catalog configurations- collaborate with other consortia members
Integrations	• Configure MarcEdit integration
Admin Jobs	• Run shared job • Create and run private job
Research LSP feature	• Write about LSP feature, how you would use it, and how it connects to cataloging • Share in discussion post, comment on peers' posts

PORTFOLIO

- Portfolio of exported records, statistics, scripts and rules, metadata mapping, etc.

- Cover letter demonstrating how their course experience relates to job, including examples of applying cataloging concepts to systems.

CHALLENGES

- Costs, funding

- System, troubleshooting support

- Long-term support, including future migrations

- Department support

- Instructors, scheduling

- Course collaboration

- Course materials

IT WOULD TAKE DECADES OF WORK

BY THOUSANDS OF SCIENTISTS, IN A PARTICLE ACCELERATOR

POWERED BY DUMP TRUCKS OF FLAMING GRANT MONEY!

imgflip.com

https://www.reddit.com/r/labrats/comments/cvzxo2/this_is_my_favorite_quote_from_futurama_just/

MOVING FORWARD

- Identify project members
  - Instructors and departments
  - Library software companies

- Form consortia
  - Values, missions

- Funding
  - Grants
  - Support by departments

- Shared catalog
  - Implementation
  - Maintenance
  - Best practices
  - Course collaboration

- Consortia meetings and communication
  - For instructors and students

- Assessment

UNTIL THEN…

- Local catalogs

- Repositories, digital platforms

- Free tools like MarcEdit and OpenRefine

- Course guest speakers

- Catalog field trips

QUESTIONS?

Dom Bortruex

Bortruex@american.edu or dbortma1@kent.edu