Just Keep Cataloging:
How One Cataloging Unit Changed Their Workflows to Fit the Pandemic Remote, Hybrid, and In-library Work

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Agenda

01 Background & Timeline
02 Phases of Remote Work
03 Lessons Learned
Background & Timeline
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
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<tbody>
<tr>
<td>February 24, 2020</td>
<td>Cataloging &amp; Metadata Services Unit Head starts 6-month sabbatical - Interim Heads begin service</td>
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<tr>
<td>March 6, 2020</td>
<td>First Covid-19 case confirmed in Utah</td>
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<td>March 12, 2020</td>
<td>USU announces classes are cancelled March 13-17</td>
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<td>March 18, 2020</td>
<td>USU moves all classes online and staff start working remotely</td>
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COVID-19 Remote Work Timeline

- **Workplans**: March – April 2020
- **Phase 1**: May – August 2020
- **Phase 2**: August – December 2020
- **Phase 3**: January – August 15, 2021
Workplans & Phase 1

March – August 2020
Phase 1 – Red Level, 100% remote

Individual workplans
- Modified for remote work

Remote work responsibilities
- Coding project, digital collection metadata, professional development, transcription, EAD guide remediation, and ArchivesSpace ingestion
Phase 1 – Red Level, 100% remote

Copy Cataloging (1st workflow)
- Collection Management and Resource Sharing (CMRS) staff
  - Received item
  - Entered cataloging information into Airtable (May-June 2020)
  - Stamped, tattle-taped and barcoded the item before checking it out and sending it to the patron
- Cataloging and Metadata Services staff
  - Used information input into Airtable to catalog item while book was out to the patron and change the location code to match the call number
- Circulation staff
  - Upon return of the item, the circulation staff would label and RFID the item before shelving
- Systems Librarian
  - Ran periodic Sierra reports to ensure all books were cataloged
- Collections Management and Resource Sharing Unit decided entering this amount of pre-cataloging detail was unsustainable
Phase 1 – Red Level, 100% remote

Remote Cataloging Workflow (2nd workflow)

- Collections Management and Resource Sharing staff add ISBNs to brief ILS order records
- Item cataloged by using ISBN
- Item placed on cataloging unit shelves
- Student technicians in charge of labeling, barcoding, and RFIDing items
Phase 2
August-December 2020
Phase 2 – Orange Level, 75% remote

In-Library responsibilities

☑ Quarantine system (internal, at least 24-hours)
  - Drop-off forms
    - Indicate date/time dropped off in CMS and from CMS to Circulation

⏰ Weekly shifts (some catalogers & student workers)
  - Shared online calendar (TeamUp)
  - Primary responsibility
    - Item tracking
    - Catalog time sensitive items (rush = POD, DDA, Hold)
Phase 2 – Orange Level, 75% remote

Airtable Tracking

- Added information to assist with remote cataloging (complex cataloging)
  - ISBN
  - Publisher
  - Publication Year
  - Publication Location
  - Pagination, Illustrations, and height
  - Optional: photographs of items (e.g., title page, title page verso)

- Complex items assigned to at-home cataloger, placed on holding shelf and processed later
Phase 2 – Orange Level, 75% remote

Airtable - Integration with Slack
  o Remote Questions
    o Used to gather needed information to complete cataloging – Airtable automated messaging sent to a dedicated Slack channel
    o Example: Slack message sent from Airtable "There are 2 copies on this record: which one is to be withdrawn?"

Responsibilities documented in Confluence
  o In-Person Cataloger Responsibilities (MORNING)
  o In-Person Cataloger Responsibilities (EVENING)
  o Remote Cataloger Responsibilities
    • Remote Cataloging - Additional Tasks, Time Permitting
Phase 2 – Orange Level, 75% remote

Remote work responsibilities

- Cataloging assigned items, batch processes
- Digital collection metadata (includes remediation)
- ArchivesSpace
- Scholarship and professional contributions
Phase 3

January-August 15, 2021
Phase 3 – Yellow Level, less than 75% remote

辐射图标 提高隔离系统（内部，24小时）
  - 派出所形式与旋转隔离车
    - 上午和下午的责任

时钟图标 增加轮班（更多分类者和学生员工）
  - 主要职责
    - 时间敏感项目（急件 = POD，DDA，Hold）
    - 其他项目

勾图标 继续使用Airtable跟踪和利用保留货架，其他远程项目
Hybrid Remote/In-person Cataloging Workflow

- Drops off new acquisitions (placed on labeled cart placed at main entry of 236)
- Takes oldest quarantine cart from quarantine area
- Enters items into the CMS item tracker in Airtable
  - Assigns Cataloger
  - Places complex items in central shelving area
  - Checks Airtable for items in view for "Ready for processing (COVID protocols)"
- Pull all items that are listed (either on central shelves or cart to go to Circulation)
- Complete Physical Processing for items if needed
- Deliver items to Circulation on appropriate shelves with drop off date/time
  - Circulation checks items in and affixes RFID tags
- Simple
  - Catalogs items assigned, processes, and takes to Circulation or places on cart to go to Circulation
- Complex
  - Checks for assignments and catalogs remotely
  - Updates Airtable tracking to reflect finished items
- Collections Management and Resource Sharing
  - CMS - Early Morning Staff/Student
  - CMS - Main Cataloger (see chart)
  - CMS - Afternoon Staff/Student
  - Circulation
Lessons Learned
Lessons Learned

Communication
- Frequent updates and transparency
- Multiple methods more effective (Email, Slack, Zoom)
- Extra care, consideration, sensitivity

Health and Wellness
- Social hours (optional)
- Fun Slack channels
- Administration
  - 2.5 hours health and wellness time per week
Lessons Learned

Flexible workflows

• Can re-implement at any level, if needed
Thanks!

Any questions?

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