

## **Cataloging and CARL**

Our transition to CARL has been disruptive and difficult. One of the biggest changes involves cataloging and how records get into the ILS. This document will outline the challenges CARL poses, where we hope to go, and what you can do.

### **Skyriver and Sierra**

Innovative developed both Sierra and Skyriver, so integration was nearly seamless and allowed us to extend functionality to the libraries. Sierra does a great job of working around record quality issues from Skyriver. For example, if a library accidentally brought in an e-book record instead of a regular book record, Sierra and Encore would not identify it as an e-book and would still let you find the record.

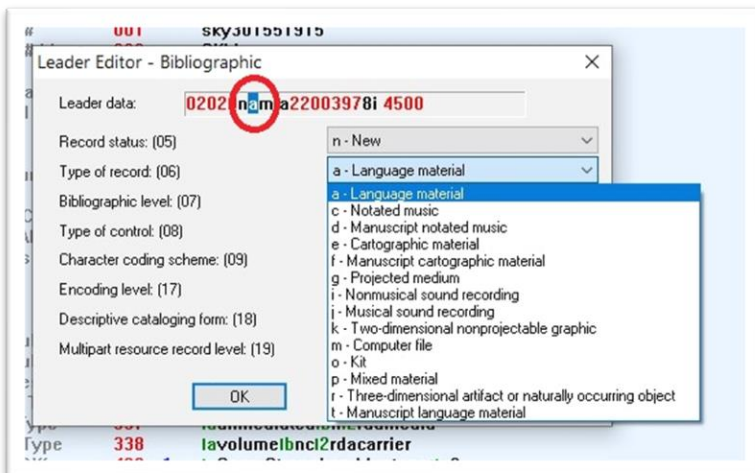
One of the biggest obstacles that we knew we would face in migrating to CARL was the quality of the records already in our catalog. Skyriver has no quality control mechanisms in place and all records from Sierra libraries are harvested into Skyriver whether they are complete or not.

### **Skyriver Quality and InfoSoup**

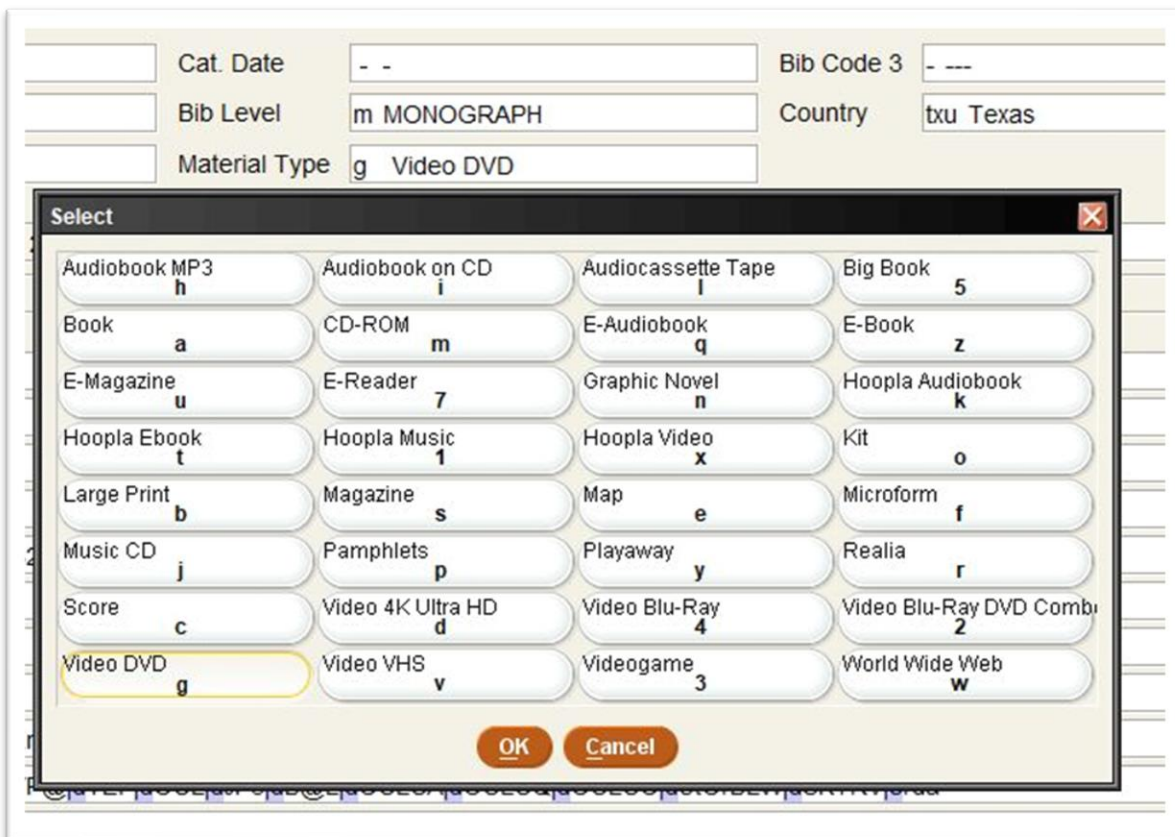
CARL is utilizing more information from the MARC bibliographic records to identify material formats. You will sometimes see a DVD showing as "Video Recording" in InfoSoup due to the quality issues mentioned earlier. When we had Sierra, we asked system catalogers to focus on the information that appeared directly in InfoSoup, typically physical descriptions, summaries, author/title, etc. These problems were easily identified and relatively quick to fix to display correctly in the online catalog. Having a library bring in a record that wasn't exactly right didn't necessarily prevent discovery in InfoSoup.

Since our move to CARL, we must now address those record issues that weren't a factor in Sierra. These quality issues are why some items are coming up as DVDs and some are coming up as Video Recordings.

CARL is utilizing cataloging standards, so MARC bibliographic records with incorrect Leader (LDR), 006, 007, and/or 008 field info can affect the way an item will appear in InfoSoup. One single incorrect character in any of the above fields can change whether an item appears as an electronic resource, print book, audiobook, CD, DVD, Blu-ray, Playaway, etc. In the image below the letter "a" in the leader data can represent a few of the different item types as noted in the drop-down. Depending on the material being cataloged, fields in the 006, 007 and 008 will also control the way an item appears in the catalog.



In Sierra, if a record displayed as being an incorrect format in the OPAC there was a Material Type selection box above the bib record that essentially overrode the incorrect record info in the leader, 006-008 fields. Changing the material type in Sierra didn't fix the record but it did fix the way the item displayed in InfoSoup.



CARL doesn't have a material type selection box, but rather takes the information directly from the bibliographic record and translates that to what is displayed in

InfoSoup. If anything is incorrect in the bibliographic record, it will show in the online catalog.

### **Skyriver and OWLSnet**

While we have migrated off Sierra, we are still using Skyriver as our bib utility tool. We knew we were going to have to deal with the large amount of Skyriver records currently in the catalog and the display issues that would result. We were faced with the dilemma of already having records with incorrect or incomplete coding in the system, and we didn't want to increase that amount. We realized we needed a quality control mechanism but had to set up a workflow that wasn't completely alien to what we've been doing.

The easiest way to accomplish this was to interrupt the process at the point of catalog entry. Due to the complicated and time-consuming nature of coding issues in the leader field (LDR) and 00X fields we decided to continue to let libraries do what they excelled at and pick the records they wanted by using the Skyriver client and emailing the records to Cat Help—this is the new Skyexpress process. OWLSnet catalogers would then take on the time-intensive responsibility of making sure the coding of those records was correct. This workflow allowed libraries to include information they typically emailed Cat Help, including page numbers, size, etc., when they requested the record. The turn-around time for these records is about 2 days. We know it's not as instantaneous as it was in Sierra, and we hope to bring it down further when workflows are established, and our backlog is manageable.

### **Vendor Bibs**

Included in the backlog are vendor records. Vendor records are very short bibs that usually contain title, sometimes author, and ISBN/UPC. They enter the system after a library places an order with a vendor and uploads the short bibs into the system. Order information is attached to the bib and patrons can immediately begin placing holds against them. They remain a vendor record until that library receives the physical item and updates the bib record to make it complete.

At any given time, we have about 4,000 vendor bibs in the database (out of 760,000 bibs). Those numbers may be higher right now due to the migration and acquisitions libraries learning new workflows. Sometimes a second library will get an item before the first library that purchased it through acquisitions and brought in the vendor bib. The second library will send some of the missing information to OWLS for the purpose of updating the record. It is not necessary for libraries to do this. Vendor records will be updated when the purchasing library gets the item. We acknowledge they are a necessary, temporary evil and while we do not like them, libraries should feel comfortable attaching their items to a vendor record to get materials out on the shelf faster.

## Expectations

### Bib Records

If you find a record in CARL that matches your item, go ahead and attach your item to the record. If you find a complete record in Skyriver add it to your Skyexpress list and email it to us. *We are adding dozens of records daily so don't let your lists build for days.* Finally, if you cannot find a record in CARL, or a complete record in Skyriver, then fill out a cat request and we will make a complete record for you. If you fill out a cat request for an item, you do not need to add it to a Skyriver records list and vice versa. The way we approach records is still the same as we did in Sierra.

### InfoSoup

We ask that you continue to report anything weird or wrong in InfoSoup to OWLSnet Help. Most of these issues are related to the algorithm used to group items in CARL's discovery platform, making it difficult or impossible to find certain titles. We know reporting bugs and errors is time consuming and frustrating for library staff and patrons alike, but we will eventually get these issues resolved. This is not a cataloging issue and must be addressed by ungrouping the items in Discovery. We have a list of records grouped together and are systematically going through them to verify accuracy.

If an item displays as "videorecording" instead of "DVD" or "Blu-ray" in the catalog, please email Cat Help.

### Looking Forward

Once we are settled in with CARL, our goal is to get back to training and allowing libraries to bring in their own records again. Training library staff to be better catalogers and opening access has always been a goal of OWLS cataloging.

There are many factors that will slow us down that we want you to be aware of.

- We migrated 760,000 bib records—it will take a while to clean these up.
- We're learning complex workflows as well—please be patient.
- We're still working remotely, so technology is not always on our side. It's also making learning from each other incredibly difficult.
- Acquisitions has only very recently been set up, so there are not as many records in the system as you would normally find. We suspect many libraries are spending more time filling out Cat Requests because there are fewer records to choose from.
- Copy cataloging hasn't been figured out yet.
- Appleton, which is a major cataloging contributor, is working with us to figure out cataloging workflows, but their workflows have been impacted by the acquisitions slow-down.
- BiblioCommons is coming.
- We must set up magazine grids and subscriptions for every library.

If you or your library staff are interested in the possibility of correctly cataloging and bringing in records, then please contact us and we can give you some resources where

you can learn about coding records, RDA, and some of the other aspects of record cataloging required with the new ILS.

## **Conclusion**

As far as library workflow goes, we've tried to keep library workflow as close as possible to what it was before migration. The only change is the roughly 48-hour delay between the record being sent to us and fixed and then added to the catalog. Once our backlog is eliminated or at least decreased to a manageable level, we hope record turn-around time to be shorter and anticipate our primary focus to be working on issues with discovery groupings, coding issues in pre-Carl records, documentation, authority cleanup, etc.

If you have an ideas or thoughts on how to make things better, we'd be happy to hear them.

Use the following resources:

### **Cat Help**

- Cataloging questions
- Questions regarding bib records
- Add/remove serials or are having problems with serials
- Report changes to records (this can also be done when requesting Skyriver records in the notes section)
- InfoSoup incorrectly lists the item as "videorecording" instead of something else
- Want to say hi to your favorite cataloger

### **Cat Requests**

- New records for unique items that do not exist in CARL and there is no Skyriver record.
  - There are vendor records, incomplete records and a some really bad records in Skyriver, and if that is the only record available, we may ask you to submit a cat request for it instead. It takes a while to create new records.

### **OWLSnet Help**

- Items are grouped in InfoSoup incorrectly
- You can't find an item in InfoSoup but you can in CARL