

Supporting Cooperative Cataloging... at Harvard and BEYOND! :

Building robust common tools for the OCLC Connexion client

Project Summary:

Develop a powerful and well-targeted set of shared tools for the OCLC Connexion client to facilitate efficient workflows for metadata creation, **focusing on two primary needs: tools for facilitating entry of high-value data elements and promoting more effective integration with the Aleph Cataloging module.**

Project steps would include:

1. **On the heels of a very successful 4/13/2012 Cataloging Discussion Group on the topic of Connexion macros, announce project to the HLCat list to solicit input and participation from Harvard catalogers.**
2. **Form project team; assembling cataloging practitioners from multiple units across the Harvard Library would be preferred so that perspectives would be broad enough to represent community.**
3. Survey existing productivity tools created by OCLC member libraries and currently shared via OCLC's macro sharing environment.
4. Evaluate the unmet needs of catalogers at Harvard for automating repetitive or formulaic aspects of cataloging within our networked cataloging environment (OCLC and the ILS, in our case, Aleph).
5. Build the tools that are identified as needed, using the dedicated OCLC Macro Language (OML) for Connexion-based activities and using other tools as appropriate to develop smooth interoperation between OCLC and Aleph.
6. Create documentation and package the tools in a useful manner for distribution.
7. Share developments with all catalogers at Harvard and the *world* of OCLC users beyond Harvard!

Background:

Cooperative cataloging is a core concept in the library metadata community. In a nutshell, it means libraries share catalog records with each other so that libraries can minimize any duplicated effort. When OCLC was created in the late 1960s, they laid the groundwork for libraries to coordinate efforts in this area. Libraries across the country, and indeed internationally, have embraced and relied upon it for successful allocation of staff resources. As stated on OCLC's website, the initial idea was to combine computer technology with library cooperation to reduce costs and improve services through shared, online cataloging.¹ Libraries want to ensure that our collective efforts are maximized, and we aren't wasting time cataloging the same thing.

What problem it will solve:

OCLC's Connexion client is a tool that a majority of libraries in the United States rely upon to search for and use available catalog records, and likewise, to share with other libraries the records that they create. While the Connexion client has continued to improve over the years and new versions are released with functionality enhancements, the client is woefully lacking in many basic productivity tools

¹ See the OCLC history on their website, which also includes these impactful statements: "Libraries recognize the power of sharing, accomplishing much more collectively than individually. Working together lowers costs, speeds workflows and reduces redundancy. Sharing resources expands impact and creates more value for library users. And a network mind-set fuels innovation and creates a unifying force for engaging other communities and supporting the public purpose of information access for all." Taken from the OCLC website on March 30, 2012.

<http://www.oclc.org/us/en/about/cooperation/default.htm>

for catalogers. With a preponderance of catalogers all struggling to solve the same problems within a common system, it would be tremendously useful and cost-effective to create a common toolkit and share it with all. **Locally, creating tools that allow two critical systems, OCLC and Aleph, to work together more effectively would have major productivity and training benefits.**

How it fits with existing activities:

Macro development is alive and well within the Harvard Library. Given the very high volume of metadata creation at Harvard, macros are readily accepted as a necessary element in our productivity toolkit. OCLC provides a macro development language within Connexion, the dedicated OCLC Macro Language (OML). The OML specifically provides:

- Standard BASIC functions and statements
- Object class and variables to provide the *interface to client* functionality
- Macro commands developed specifically for Connexion client functions

How it is different from other similar initiatives:

Macro developers within the Harvard Library have found MacroExpress scripts (Harvard's preferred macro development environment in use within Aleph) do not always integrate properly or function with Connexion. Outreach to OCLC has confirmed that they make no attempts to enable Connexion to work with other macro development tools.

It is time to invest a small amount of effort and time to develop expertise with the OML so that we can more effectively craft tools that enable us to interoperate best with both OCLC and our ILS. Developing OML macros to automate OCLC aspects our work would then allow staff to analyze and map out best practice workflows to help our staff utilize both OCLC and Aleph to their fullest capacities. As the Shared Services model is taking shape at Harvard, identifying best practices for technical services will be very important in our complex and varied work environment.

What resources are necessary in the short and long run, including how daily operations will be shifted in order to allow time to work on the project?

There are macro developers in our current units who could be charged with undertaking this project. There are also many other interested staff who have a facility and a desire to apply themselves to learning more technical skills with applicability in the Library. This would be an excellent staff development opportunity. If the project is accepted, I would like to incorporate appropriate outreach to Scott Wicks and cataloging unit managers to build a Harvard-wide/cross-unit project team.

A budget outline

For project staff, release time from regular duties would be the primary support that is necessary. Some salary reimbursement to their home unit would be appreciated in case staff time needs to be back-filled to cover local responsibilities. Library Lab programming support would also be a big help in assisting staff to learn the OML or to perform any complex scripting that may best be performed using other tools.

Measuring benefits of the project

Benefits to the Harvard community would be two-fold: 1) in developing and distributing shared cataloging productivity tools, and 2) in bringing together a cross-unit project team that would contribute to creating the Harvard Library technical services/shared service community.

Benefits to our peer community would also be derived. Tools would be shared with the national cataloging community and available openly for download from OCLC's macro sharing platform on the web. The shared tools could be promoted on the AutoCat listserv or appropriate OCLC forums to make sure they have maximum benefit to the cataloging community.

In an email exchange with OCLC in February 2012 seeking information about the long-term viability of the OCLC Connexion client, OCLC pledged to support the OML for the foreseeable future. Given the high volume of cataloging activity within the Harvard Library, the benefits of this small investment in tool development could be significant over even a short timeframe, such as 18 months.²

How to determine whether the project has succeeded or failed

So far, I've discussed the proposal with a number of cataloging community leaders at Harvard, and they are enthusiastically supportive. Measures of success would need to come from the cataloging practitioners themselves after adoption of the tools and thorough testing at Harvard reveals them to be useful. A two-part project survey to measure success should be incorporated into the project methodology, within the initial phase to identify the catalogers' macro development needs and then again at the end to gauge successful adoption of the tools.

Existing support at Harvard for the project

Even with the limited outreach that I was able to perform during the development of this proposal, I am optimistic for the success of this project due to the level of enthusiasm exhibited in the Harvard cataloging community. Current supporters of the project are varied and include co-chairs of the Harvard Library Cataloging Discussion Group: Craig Thomas, *Senior Cataloger*, Harvard College Library Technical Services; Peter Rolla, *Information Acquisition and Management Librarian*, Countway Library of Medicine; and Nell Carlson, *Head of Technical Services*, Andover-Harvard Theological Library.

Other supporters include Isabel Quintana, *Head of Technical Services and Senior Cataloger for the Tozzer Library*; Amy Benson, *Librarian/ Archivist for Digital Projects*, Schlesinger Library; Donna Viscuglia, *Senior Cataloger* and former HCLTS Connexion working group chair, Harvard College Library Technical Services; and Jane Eichkern, *Manager for Metadata and Cataloging* and departmental trainer for copy cataloging, Harvard College Library Technical Services.

Scott Wicks, *Head of Information and Technical Services* for the Harvard Library, indicated that he "heartily supports" the proposal and wished to be included in the list of project proponents. At Scott's suggestion, I reached out to Nina Davis-Millis, *Head, Metadata and Enterprise Systems*, MIT Libraries, to see if MIT would be interested in participating in this project. As fellow users of Aleph and OCLC Connexion, Nina was extremely supportive and enthusiastic of the effort on behalf of MIT.

² On 2/27/2012, Shawn Thomas, Senior Support Analyst in the OCLC Customer Support Department, wrote: "macros and macro commands are backward compatible, so macros created now will continue to work with future versions" [of the OCLC Connexion client].