Library Lab Project Final report:
Supporting Cooperative Cataloging… at Harvard and beyond: Building robust common tools for the OCLC Connexion client

Project summary

The OCLC 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 for catalogers. With a preponderance of catalogers all struggling to solve the same problems within a common system, this project aimed to provide training in the OCLC Macro Language (OML) so that staff would be able to create a common toolkit and share it with the cataloging community.

In early July 2012, 45 staff members, primarily from Harvard but also a small number from MIT, representing 11 different libraries, gathered for the project kick-off meeting in Lamont Library. In addition to a rich discussion of the project goals and preliminary ideas for project outcomes, we asked for volunteers to contribute to the project in any of these various ways:

1. To drive the development efforts for the project team, we asked for cataloging practitioners to work together to develop and prioritize a macro wish-list, identifying ideas for tools that would make cataloging in Connexion easier, more efficient or more effectively integrated with our work in Aleph.
2. We asked for staff to self-identify if they were interested in learning the OCLC Macro Language (OML) to perform the actual macro development.
3. We asked for catalogers who were willing to test macros that the project team developed.
4. And lastly, we asked for creative thinkers who would help us envision ways to integrate cataloging work performed in Aleph and Connexion into more seamless 'best practice' workflows.

The kick-off meeting resulted in 34 people, including 2 MIT colleagues, volunteering for the four task groups.

Attended by 20 staff members in September, we offered a 1½ day training with a cataloger/macro developer from the University of Rochester library system. Identified by OCLC's macro expert, this U of R colleague was an accomplished OML macro creator who led OML instructional sessions on the first day, and a practice "lab" session on the second morning. He generously left behind with us with his full macro workbooks which we hope to use in 'learning through deconstruction' and to potentially adapt to local uses.

We used a project wiki as the single place for information where anyone involved in the project, or indeed anyone at Harvard and outside colleagues who were interested, could go to see the progress of the project, sign-up for volunteer opportunities and even to record comments and suggestions for the Macro wish-list.

Accomplishments

Through the engagement of the volunteers, the prioritized macro wish-list is a useful representation of the needs of the cataloging community and will continue to inform macro development efforts. While the training provided a starting point for some to begin coding new macros, the project as a whole created a fruitful venue to begin building new connections within the Harvard and MIT cataloging and technologist communities. We will continue to build on those connections as we jointly go forward with RDA

training, evaluation of next-generation ILS systems, and any other projects where the two institutions can collaborate.

Macros that are developed will be shared broadly within Harvard and also shared with the OCLC macro user community.

Challenges – anything we couldn't do

The OCLC macro language is a form of BASIC programming language which presents a substantial learning curve for non-programmers to learn. Unlike scripting tools such as MacroExpress that provide a rich Windows interface for writing and editing macros, the OML editor is excruciatingly rudimentary. 1½ days of training turned out to be only enough for an entry point to OML, rather than launching a flurry of macro development activity that had been the wish of the project leaders.

Although our trainer's expertise in OML was deep, the complexity of the topic and the lack of formal iterative training materials was challenging for some to begin building a foundational understanding of OML with this training alone. Despite that, many training attendees have expressed enthusiasm to continue working together to explore the macros that our trainer generously left behind with us, to edit some of the macros to our needs, and thereby provide a simpler entry point to beginning to work with OML. Some staff are actively beginning to write macros, while other staff will need more learning opportunities in order to apply the knowledge that they have begun to acquire.

Next steps

After the training, we followed up in the form of a simple survey to all the volunteers so that we could identify next steps that would have the support of the community. We asked the volunteers the following three questions to learn the best ways to support their learning and to enable each of them to begin applying their new knowledge:

1. Would you be willing to partner with another person to evaluate Harvard uses for some of Walt's macros? (e.g. pairing a cataloger with a code-savvy person to look at how we could make use of his macros)

2. If offered, would you be interested in alternate group formats for learning OML? As expressed to me by one participant: "this could include being buddied up with someone in free-form 'code-jam' sessions in a lab or more formal presentation settings."

3. Do you have ideas for other ways to support OML learning, or alternate training formats that we should try to offer?

We are working now to evaluate the responses and arrange further learning opportunities.

Presentations that involved the project

Library Lab lightning round in Lamont Library
Library Lab video
Library Lab showcase

Project sponsor, Michelle Durocher; Project Manager, Jane Eichkern