

# Cataloging/Metadata Remote Work

Note: the following list is written for a traditional ILS (MARC catalog), but can be adapted and applied to any metadata schema (Dublin Core, EAD, etc.) and any metadata database ([institutional] repository, ArchivesSpace, etc.).

Additions welcome! For technical questions, difficulties, updates, or corrections, contact Shana L. McDanold, Assistant Manager, Cataloging, District of Columbia Public Library, Washington, DC, [shana.mcdanold@dc.gov](mailto:shana.mcdanold@dc.gov) or via Twitter [@slmcdanold](https://twitter.com/slmcdanold)

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## OPTIONS

Edit existing bibs:

- correct invalid/obsolete MARC tags
  - Ex. 440s → 490/830 pairs
  - Caution!: the 260 is NOT invalid or obsolete; it means something different from the 264
  - See the lists of changes to MARC: <https://www.loc.gov/marc/status.html>; also remember that the history of each tag is at the bottom of its webpage and on the general information for each collection of tags
- change Latin to plain English
  - Caution!: make sure you limit this to specific fields (like the 260/264) and phrases (match case!) or things get weird
  - RegEx is your friend
- spell out abbreviations
  - Caution!: make sure you limit this to specific fields (like the 300) or things get weird
  - RegEx is your friend
- remove GMD (replace with 33x fields)
- add 33x/34x/38x fields
  - Especially for audio-visual and other special formats (large print!)
- add access points and controlled vocabularies
  - Ex. non-English subjects; genres; specialized vocabulary (such as Getty, or RBMS)
- add other data/information

- Ex. 505, 520
- Ex. local fields/headings
- update MARC to add subfields
  - Ex. 502
- update MARC fixed length data fields with added/updated codes
- identify and add missing data fields (missing MARC tags)
  - Start with standard numbers use as match points (LCCN, OCLC, ISSN, ISBN, ISMN, EAN, UPC, etc.)
- add series access points when series is known (local or controlled)
- access point (authority) work (update/flip headings)
- replace/update bibs that need "help" (brief or super old bibs, bibs are incomplete or prepublication, etc.)
- find and fix typos (start here: <http://terryballard.org/typos/typoscomplete.html>)
- remove ISBD punctuation per PCC Minimally Punctuated MARC Bibliographic Records guidelines (links here: <https://www.loc.gov/aba/pcc/>)

#### Run various reports to find data outliers

- Ex. Items with mis-matched codes (circ code for one format, but format is coded for another); locations no longer in use; records missing coding (like empty item types); duplicate barcodes; etc.
- Ex. Search for “orphan” (unlinked) records, such as bibs with no items
- Ex. Check the language of cataloging (040 subfield b)
- Ex. Duplicate records - find and merge
- Ex. Duplicate call numbers - remember if you change it in the system you’ll have to track so you can update the spine labels on the books

#### Review and work on vendor reports

- Ex. OCLC holdings unresolved records (no match found in OCLC) and unprocessed records due to errors (OCLC couldn’t read the record)
- Ex. reports from your ILS vendor (bibliographic record analysis; duplicate records)

#### Work on statistics

- Ex. run reports, consolidate, review, etc.;
- Note: especially challenging for online usage statistics due to difference in methods by vendors (not all use COUNTER and/or SUSHI)

#### URL checking

- Use your system’s URL checker; or check manually

- Warning: checking manually is very very tedious; best to have a good series/movie/podcast to enjoy while you click

Serial title changes - check the serial titles for missed title changes

Documentation - update, create, etc.

Training (webinars)

Catch up on professional reading and/or writing

Cataloging digital objects

- created in house
- purchased from vendor(s)
- institutional repository / special collections digitized non-text objects

Copy cataloging

- scan relevant pages
- GoogleSheet: title, author, publisher, dates, ISBN, any special details/data, local barcode; staff copy cat and add OCLC# and system ID (bibID) to the spreadsheet as each is completed

Peer review of bibliographic and/or authority records

Enhance/fix vendor records

Planning for cataloging projects (try remote Zoom meetings w/colleagues)

## REMINDERS

about batch editing/editing existing bibs

Keep in mind:

- transcribed data fields - do NOT edit without the piece in hand
- controlled data fields - make sure you're using the appropriate and documented data elements/codes
- free text fields - edit at will

- local and past practices

Rules for editing:

1. IF IT'S NOT WRONG, LEAVE IT ALONE.
2. If it's wrong, fix it or delete it
3. Add new and/or enhance existing controlled access points
4. Enhance description
5. Make it "pretty"

Remember the goals of cataloging:

- make things findable
- make things uniquely identifiable

Cataloging core/basic elements/purposes:

- description
- collocation
- disambiguation
- relationships

You cannot “convert” a record from one set of cataloging guidelines/rules (such as AACR → AACR2 or AACR2 → RDA) without the piece in hand. You can add elements, especially access points and free text fields, creating a hybrid record. But you have to REdescribe from scratch *with piece in hand*, to change the record from one set of guidelines/rules to another.

## QUESTIONS TO ASK

Do I get a work-issued laptop?

Will I be using remote desktop? (if so - what's my work computer's “name”?)

What software do I need?

Do I need VPN?

Is there a proxy I need to connect through?

Access to content

    Firewalls?

    IP address limited?

Existing documentation

    Where is it?

Physical? Online?

## RESOURCES

Metadata/Cataloging GoogleDoc

<https://docs.google.com/document/d/1tPa7Lu0Ccvld57SqextU8VM7XSIhc7JfIN0a20R RoNg/edit?usp=sharing>

Archivists at Home

[https://docs.google.com/document/d/16ubmmTtJ7oCjbUFI\\_75fqG9J62pul9dg\\_RCd4a u4tMw/edit?usp=sharing](https://docs.google.com/document/d/16ubmmTtJ7oCjbUFI_75fqG9J62pul9dg_RCd4a u4tMw/edit?usp=sharing)

Zoom <https://zoom.us/>

WebEx <https://www.webex.com/>

GoToMeeting <https://www.gotomeeting.com/>

Libre Office <https://www.libreoffice.org/>

Notepad++ <https://notepad-plus-plus.org/>

MarcEdit <https://marcedit.reeset.net/>

OpenRefine <https://openrefine.org/>

FileZilla <https://filezilla-project.org/>

COVID4GLAM Discord Channel <https://discordapp.com/invite/vkaSYV5>

More ideas:

Randall , Ryan P., and Jennifer LC Burke. "Library, Archives Workers Share Work-From-Home Ideas." Library Journal, 23 Apr. 2020,

[www.libraryjournal.com/?detailStory=Library-Archives-Workers-Share-Work-From-Home-Ideas](http://www.libraryjournal.com/?detailStory=Library-Archives-Workers-Share-Work-From-Home-Ideas)