What Comes After Voyager Cataloging?

Update From the Cataloging and Metadata Next Generation ILS Planning Team

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GIL Next Generation
ILS Planning

- Research, explore, plan for a Next Gen ILS and develop an RFP for vendors

- Kick-off meeting: September 13, 2013

Fast Turnaround:
First draft of RFP requirements due December 2013
Next Generation ILS Characteristics

- User search & discovery functions (catalog/public interface) are decoupled from the back-office functions
- Accepts multiple metadata types (not just MARC)
- Web-based
- Integrates electronic resources into its standard back-office processes
- Analyzes data and trends (manages use statistics) across a variety of locations, users, and material types
- Provides opportunities for more efficient workflows
- System (software and data) resides “in the cloud”

List from Bill Clayton’s “Characteristics of the Next Generation Integrated Library System,” http://gil.usg.edu/gilhome/about/page/category/next_gen_ils_planning_information

Presented in Teeny-Weeny Eyestrain-O-Vision
Next Generation for GIL: Why Now?

- Shift from print to electronic
- Multiple metadata schema for our collections
- Need for better information to manage our collections
- Opportunity to be more cost effective in the way we work
- Information hungry users expecting to access resources from anywhere -- no matter who owns or licenses the resource. And they want to do it seamlessly.
- New systems in infancy – an opportunity to influence and perhaps get better pricing
- New releases of Voyager planned, but…
- RACL determined this was a priority

Next Generation Planning Teams

- Acquisitions, Serials, ERM
- Assessment (Reports, BI, Analytics)
- Cataloging and Metadata
- Cloud/Systems/Architecture
- Fulfillment (Circ, ILL, Gil Express)
- Communications

Teams to produce separate RFP sections

Related Groups:
- Collaborative Technical Services Group
- Discovery_GIL OPAC

Vivienne Strauss, “Cat Clowder, Not to Be Confused with Clam Chowder,” watercolor.
Team RFP Assignments

- Structure
- Introductory Description
- List Required Functionality
- Questions about Functionality

November 2013

December 2013

Image from http://dakiniland.files.wordpress.com/2012/02/cat-reading-to-kill-a-mockingbird.jpg
Cataloging/Metadata Team

- 18 members from USG institutions & GIL
- Wide range of representative institutions and members to give diverse perspectives
- Team works virtually
  - Google Drive
  - Listservs
  - WebEx

Klara Kim, via http://thefluffingtonpost.com/post/23816203620/cat-dewey
Cat/Met Team Initial Research

- Read articles about next gen systems
- Looked at RFP standards and recent RFP examples
- Visited next gen ILS vendor websites and attended webinars and demos of next gen systems
- Developed team list of what we wanted to see in a new ILS, list of awkward workarounds or perceived failures of current systems
- Lots of discussion and debate!!

Image from http://backpackceo.com/5-ways-to-improve-your-time-management/
RFP Structure and Introductory Description

- Team members wrote cataloging and technical services workflow scenarios
- Ended up with brief Introductory Description plus short introductory statements for each part of the Structure
- Longer scenarios eventually compiled into freestanding Addendum to Cat/Met RFP section
Cat/Met Team Survey

- Distributed Nov. 1, closed Nov. 18, 2013
- Worked with Acquisitions/Serials/ERM Team and Collaborative Technical Services Team
- Largely open-ended questions to gather information

Distribution:
- G2Cat listserv
- Technical services contacts at institutions not represented on Cat/Met team
- Sent by each Cat/Met team member to institutional contacts
Cat/Met Team Survey

72 survey responses

Please indicate the size of your institution (FTE enrollment).

- Very small (up to 1,000 FTE) - 59.7%
- Small (1,000-2,999 FTE) - 11.1%
- Medium (between 3,000 and 9,999 FTE) - 25%
- Large (10,000 or more FTE)
Cat/Met Team Survey

Job functions of respondents

Please select the category or categories that best describe your job functions.
Cat/Met Team Survey

Local edits/enhancements to records?

Most commonly mentioned edits/enhancements:

- Additional access points
- Local notes
- Error corrections
- Collection information
- TOC/contents
- Notes unique to local copy
- Donor/gift info
Cat/Met Team Survey

Limitations of the current system (common themes):

- Difficulty of navigation and use, user-unfriendliness, clunkiness
- Difficulty of reporting and statistics
- Lacking ability to do batch or global changes
- Lack of e-resource management functionality
- Lack of integration between different modules
- Inadequate authority control functionality

Cat/Met Team Survey

Desired features or functionality in a future system (10 or more references):

- Ability to enter and maintain locally important elements or information
- Improvements or enhancements to acquisitions functions
- Improvements to searching in both the public catalog interfaces and the staff interfaces
- Easier and more flexible exporting and statistics functions
- Easy import and export of records and data
- Global/batch editing, or find and replace functions
- Interoperability with external systems, e.g., discovery tools, finding aids, vendor/publisher resources, citation management tools, metadata harvesting, etc.
- Easier and more automated authority control, or other enhancements to authority control
Cat/Met Team Survey

Perceived advantages of a shared catalog environment:

- Potential cost savings
- Reduced duplication of effort (especially in areas such as authority control that often require significant expertise)—enhancements or updates can be made once for every library that holds the title
- Time/staff savings at the system level
- Greater consistency and standardization across institutions
- Improved access to other institutions’ collections

Image from http://www.bedandbiscuits.com/cat-boarding/
Cat/Met Team Survey

Perceived disadvantages of a shared catalog environment:

- Possible job losses among technical services staff, catalogers in particular
- Loss of local customizations, enhancements, and elements
- Loss of control or autonomy over the catalog
- Increased confusion for users (e.g., regarding where resources are available)
- Errors or problems introduced by less trained staff elsewhere
- Difficulty of ensuring standardization of practice or of quality

An important takeaway from the survey was possible misconceptions that might be addressed by the planning team, such as:

- Equating shared database with centralized technical services operations and staffing

- Need for more detailed information about each system’s available functionality for local enhancements, elements, and customizations

- Need to explain the differences between the current universal catalog and a future shared database

- Misunderstanding that users won’t be able to see where an item is available
List Required Functionality & Questions about Functionality

- So...post-survey the team went back to working on the RFP section (December 2013)
- Pulled out key ideas and themes from scenarios, survey responses, and team working documents
- Organized items from various working lists into Structure
- Began molding individual items and themes into Required Functionality & Questions About Functionality (mostly the latter)
- LOTS of editing, discussion, organizing, and re-editing
Communication with Other Teams

Assessment/Reports Team

- Sent list of catalog-specific reports desired in a next gen system
- Also included general suggestions/wishlist for running reports in a next gen system, i.e.:
  - Easily customizable, on-the-fly, user-friendly UI
  - No ODBC drivers!! Please!!
  - No need to download stand-alone or 3rd party programs

Cloud Computing Team

- Sent list of technical issues, questions, and suggestions for a next gen system
Where We Are Now

- 6 next gen system demos in March and April
- **Demos were informational only**
  - To learn what the systems can do, how they do it
  - Use what we saw to refine our RFP sections and ask smarter, better questions
- Next up: Refining and improving our RFP section
- Adjusted timeline: RFP to be issued January 2015
For GIL Next Generation ILS Planning News & Updates

- Website: [http://gil.usg.edu/gilhome/about/page/category/next_gen_ils_planning_information/](http://gil.usg.edu/gilhome/about/page/category/next_gen_ils_planning_information/)


- Updates also posted on the G2All listserv

Thank you!

- Feel free to contact me with suggestions, comments, or suggestions on anything related to next gen cataloging or metadata.

- If it doesn’t pertain to the Cat/Met team, I’ll forward it to the appropriate team.

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