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## Know How to Play the Accordion, but Don't (and Other Things I Learned While Implementing a Discovery Layer: A Top Ten List)

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# Know How to Play the Accordion, but Don't (and Other Things I Learned While Implementing a Discovery Layer: A Top Ten List)

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Between May and November of 2018, Washington County Cooperative Library Services (WCCLS) implemented BiblioCore, a discovery service from BiblioCommons that would become the public interface for our existing Polaris catalog. We had a successful launch on November 14, with positive feedback from both staff and patrons. It was a highly visible project with a tight timeline. The project team was small—I was the solo cataloger and responsible for all the parts of the project that were cataloging related.

My office oversees the catalog in general, but each library manages the cataloging of their own items, so there were staff in all our libraries who needed to be kept up to speed on the changes brought by BiblioCore. That was also my responsibility.

Until the project was underway, I didn't know what work would be required, but I discovered the knowledge I had gained on previous projects was tremendously useful. Additionally, earlier cleanup projects had improved the condition of our catalog in a way which made the implementation go much more smoothly than it might have otherwise. There were, of course, things I wish I had done differently, and a few solutions I had to come up with along the way that I will use again on future projects. Every discovery layer, migration, and catalog is different, but I hope some of what I learned can be useful to others, whether or not you work in technical services, have to plan projects, or are considering a discovery service.

And what better way to organize and share what I learned than in that most ancient of organizational systems, a top ten list?

## **#10 Know your stuff—become highly knowledgeable about the formats and collections in your catalog.**

The bulk of the cataloging work on our BiblioCore implementation was what was called "mapping." Mapping is creating a key to translate formats and audiences from our Polaris ILS to the discovery layer. This involved giving BiblioCommons a list of "if/then" rules, such as: "If the Type of Material in Polaris is Audiobook on CD then the Format in Biblio-



Core is Audiobook CD.” Many of the formats were just this straightforward, but some of our formats, such as Book Club Kits and Oversize, exist on library shelves but not in any specific way in MARC21 format. Fortunately, BiblioCommons allows more complex mapping rules (employing “and/or”) and could incorporate information from the descriptive fields of the MARC record, as well as some fields of our item records. The puzzle to solve then became deciding which items and records would fall into a particular category and determining which attributes those records—and only those records—had in common.

I got very lucky here. I did not have to do a lot of research or experimentation in order to come up with additional mapping rules, because I had two key experiences already under my belt: a 2017 project to convert all our juvenile materials to fine-free and an ongoing assignment working on WCCLS’s cataloging procedures manual.

For the fine-free project I reviewed all of the nearly 400 collections used in our system: What were they called? Who used them? And for what kinds of items? All of that was still fairly fresh in my mind when I needed to create additional rules based on item records, making the process much quicker and less labor-intensive than I feared it might be.

I review our cataloging procedures manual at least twice a year. So again, all of our local conventions for differentiating Book Club Kits and other special formats were at front of mind and only required confirmation, not additional research.

We had a few formats—like books with DVD-ROMs in the back—that could be made more easily identifiable simply by adding 33X and 34X MARC fields. And I discovered that Polaris includes specific formats for Periodicals and Newspapers, but that we hadn’t been using them, leaving everything coded as Serials. After a quick survey of cataloging staff and a couple of bulk changes, I had much clearer and more accurate mapping for those formats.

### **#9 Clean your house—updating bibliographic and authority records before the project saves time.**

In the year before the BiblioCore project, one of my colleagues spearheaded a project to clean up old, minimal “legacy” bibliographic records in our system. After many items were weeded, catalogers replaced the legacy records with new, more complete records from OCLC. The record quality overall was higher, and it decreased the number of records in our system without OCLC accession numbers.

WCCLS has also been sending our records out to a vendor for authority control maintenance for several years. When we got our first look at the BiblioCore instance for our catalog, I was surprised at both how few mapping exceptions there were and how well the BiblioCore grouped (“FRBR-ized”) search results were working. I’m convinced that the legacy bib cleanup project and ongoing authority control maintenance were major contributors.

### **#8 Be prepared for dirty laundry—a new interface will expose previously invisible problems.**

Even with all the cleanup, there was still some “dirty laundry” to deal with. Things that were invisible, or at least much lower impact, in Polaris became very apparent in BiblioCore. For example, our Overdrive-provided records for Spanish language e-books had been coming in coded as English, but BiblioCore’s “smart search” feature surfaced the issue and drove us to find a solution. (The Digital Resources Librarian now orders Spanish e-books separately and creates record sets for me to bulk change.)



**#7 Become a power searcher.**

Several of the issues I encountered required finding and bulk-changing records containing specific text or MARC field indicators. These searches—856 fields without a second indicator or an edition statement with specific text—often required SQL searching, which is available in Polaris but which I had not used before. I was fortunate to have lots of example searches to work from, but training and practice ahead of time would have helped even more.

**#6 Data helps with decision making.**

Power searching and knowing what kind of reporting options were available helped with prioritizing which problems to troubleshoot first. As an example, being able to get a snapshot of how many patrons were placing item-level holds on periodicals gave the project team the data we needed to assuage staff fears that this would be a major issue at launch.

**#5 Perfect your plate-spinning technique—plan how to delegate or pause tasks.**

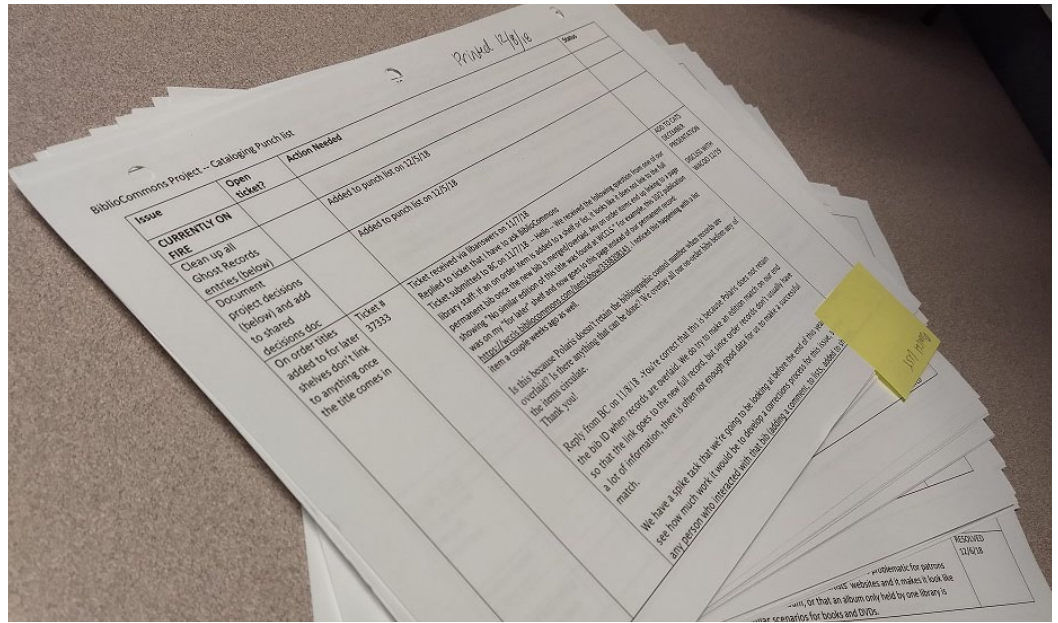
Of course the rest of my work didn't stop. I felt like I was in one of those vaudeville plate-spinning acts, constantly worrying I was going to let one fall and break. Right away, I had to determine if there were any plates that could be set down. Some non-critical routine clean-up tasks were put on pause, and as many of my daily maintenance tasks as possible—like creating schedules and purging old records—were handed off to other staff. If I had to do it over again, I would spend more time before the project planning out how I could delegate and train other staff to be my backup. I work with some brilliant library assistants who were happy to take over spinning some of my plates. They could have done more, but other tasks would have required additional training, and doing that in the middle of the project wasn't something I could take on.

**#4 Keep it together—organize your work process with a Punch List.**

The overall project was run on the Agile/Scrum framework, but in order to track my cataloging work, I created what I called my punch list. (It was really a to-do list on steroids crossed with a project plan, but punch list sounded somehow less intimidating.) The punch list was a Word document, laid out in a table. The columns were: Issue, Support Ticket #, Action/Notes, and Status. The rows were divided up into categories. These changed as the project progressed—"Display Issues" and "Mapping Issues" were big at the beginning, but then gave way to "Establish cleanup task" and "Update Cataloging Procedures." Several categories remained throughout. "Currently on Fire," "Communicate to Catalogers," and "Resolved." Nothing was ever moved completely out of the document, just into the "Resolved" category. Each entry would start as a brief description of the issue or question followed by a note in the Status column of what should happen next. For more complex issues, I used the Action column to plan out multiple possible courses of action. I copied email discussions and pasted them in their entirety. I also pasted in relevant sections from BiblioCommons's documentation and the full text of any support tickets I created. In this way, I had everything in one location, keyword searchable. This, along with the category organization, allowed me to quickly pull together lists of needed procedural updates, currently open issues, or, at the end of the project, a list of all the decisions made with the thought process behind each one. As I was constantly pulling information from this document, I found the upfront effort of compiling all the information there was a timesaver in the long run.



With some modifications, the punch list could have been used with a partner or teammates. A shared Google Doc or Trello board would have also done the job quite well, but I'm comfortable with Word tables. And at over 80 pages printed out, it made for a substantial trophy at the end.



Issue	Open ticket?	Action Needed	Status
<b>CURRENTLY ON FIRE</b>			
Unknown Format in <a href="#">BiblioCommons</a> 2599 records as of 7/23/18	[TICKET # 35802]	<ol style="list-style-type: none"> <li>WCCLS – Review and find patterns. Come up with mapping solutions as found. Clean up Polaris records as needed to improve mapping. Reply to ticket as progress made. See more tickets for specific formats below.</li> <li>BC – Respond to ticket, update mapping.</li> </ol>	In progress  PRIORITY: HIGH
<b>DISPLAY ISSUES</b>			
Branch availability for some titles – bib with single item attached showing as available in all branches.  Cause: BC indexes 856 _0 and 856 _1 and treats the bibs as online e-resources, causing them to show as available at all branches (this can't be changed)	[TICKET # 35804]	<ol style="list-style-type: none"> <li>WCCLS – Write SQL to find 856 _0 and 856 _1 and get record count                             <ol style="list-style-type: none"> <li>28,970 in live server</li> </ol> </li> <li>WCCLS – review records in BC to determine if they are going to be problematic for patrons                             <ol style="list-style-type: none"> <li>Yes. Many music CD records link out to the artists' websites and it makes it look like you're able to download the album, or that an album only held by one library is available from all. Similar scenarios for books and DVDs.</li> </ol> </li> <li>WCCLS – Look for patterns, review types of links present                             <ol style="list-style-type: none"> <li>Largest number are tables of contents and sample text.</li> </ol> </li> <li>WCCLS – Review MARC rules – are we OK to convert 856 _0 and 856 _1 to 856 _2?                             <ol style="list-style-type: none"> <li>Should be OK. 2 means "related resource" – which all pretty much are.</li> </ol> </li> <li>WCCLS – get confirmation from BC that if I bulk change to _2 this will solve the branch availability issue</li> <li>WCCLS – Create record set of 856 _0 and bulk change</li> <li>WCCLS – Create record set of 856 _1 and bulk change</li> <li>WCCLS – Add to list of things to share with CATS</li> <li>WCCLS – Add to list of updates need to CATS Procedures</li> <li>WCCLS – Update CATS Procedures</li> </ol>	6 Create record set of 856 _0 and bulk change  PRIORITY: HIGH
<b>PROCEDURES UPDATES</b>			
Need CATS procedure for adding IMG URLs for locally hosted images to bib records	WCCLS action only – no ticket	<ol style="list-style-type: none"> <li>WCCLS – Draft CATS Procedure for adding <a href="#">img</a> URLs to bibs</li> <li>WCCLS – determine where in CATS procedures this information will live</li> <li>WCCLS – share draft with CATS Procedures subcommittee and get feedback</li> <li>WCCLS – share with BCU</li> <li>WCCLS – share with CATS</li> <li>WCCLS – Share with selectors or public services staff?</li> <li>WCCLS – update CATS Procedures</li> </ol>	1 Need to draft CATS Procedure text



### #3 Leave lots of time for questions.

Every carefully drafted email or slideshow sparked several days of follow-up questions and email threads. I was surprised at first, but then I changed how I approached my project communication. I let go of trying to explain everything perfectly in the first attempt, which left me time to research the questions that I didn't anticipate, such as the request to find out *exactly* which MARC subfields were indexed for keyword and advanced searches.

### #2 Know how to play the accordion, but don't—organize and prioritize communication.

The musician Tom Waits posted to his Twitter account in 2009, "A gentleman is someone who can play the accordion, but doesn't." (I've heard variations of this quote with bagpipes, but I come from a family of accordionists, so I prefer this version.) This is one of those sayings that's easy to hang on whatever meaning you want, and I chose to use it as my mantra when planning out what information about the project I was going to share with library catalogers. My understanding of the cataloging side of the BiblioCore project was my ability to play the accordion. I needed to be ready to play if asked, but if I communicated to other staff about absolutely everything going on, it would be about as useful and as welcome to them as unsolicited accordion music.

When deciding what information to share, I eventually refined my criteria to:

1. Will this information help them do their jobs?
2. Will it help them be local experts in their libraries and resources to other staff?
3. Does it explain something that will be confusing or look unusual?
4. Do I need to share it for the sake of transparency?
5. Or is it accordion music?

As I mentioned above, this was an Agile/Scrum project, so daily communication with the rest of the project implementation team was baked in and I didn't have to come up with a communication strategy for that. But sharing information with catalogers in all the WCCLS member libraries was also my responsibility and required a communication plan. I had three main channels for communicating with them: an email list of all the catalogers in WCCLS, a blog on our internal staff Extranet, and monthly cataloging meetings where each library sent a representative. I used the "Communicate to Catalogers" section of the punch list as a de facto communication plan. As issues moved into that section, I would decide which channel could be used to share them. Urgent matters (such as a change in procedure) went out via email. Information that would be of lasting interest (such as a rundown of how keyword searches worked) was posted to the blog. Everything else was saved for the monthly meetings.

I used Google Slides to create slideshows, which were shared before the meeting, allowing catalogers to come prepared with questions. I self-imposed a limit of fifteen slides per show because I felt like it represented a digestible amount of information for one sitting. If I ran over fifteen, I would start looking for any remaining "accordion music," or any information that could be rolled to the next meeting.

I tried whenever possible to include fun images or humor in my communication. Sometimes this required spending time finding or creating the perfect meme for what I wanted to convey. As I was scrolling through gifs, all of my instincts would be telling me that this wasn't crucial; I shouldn't be wasting time on it. But based on positive feedback that I



received from staff, the effort was reciprocated with goodwill. Putting a silly or cute face on it made it easier to enlist help with all the rapid changes to workflows and procedures. That would be my final piece of advice to anyone embarking on a large project in technical services or otherwise ...



**#1 Never underestimate the power of a well-chosen cat meme.**

#### **References**

tomwaits. (2009, November 9). A gentleman is someone who can play the accordion, but doesn't. [Twitter Post]. Retrieved from <https://twitter.com/tomwaits/status/5566202901>

