



Sharon Mizota <sharon.mizota@disneyanimation.com>

VMCA Google Hangout - Writing Cataloging Guidelines

December 7, 2017

sarah acheson joined the conversation

James Clark joined the conversation

reply-107685165794723688687@profiles.google.com joined the conversation

Emily Gonzalez joined the conversation

Marcy Flynn left the conversation

reply-107682130217140350584@profiles.google.com joined the conversation

Marcy Flynn left the conversation

reply-114488774017814479191@profiles.google.com joined the conversation

Jennifer Hecker joined the conversation

reply-101111544694344947566@profiles.google.com joined the conversation

Helen Baer joined the conversation

Kacey Donner joined the conversation

Halley Grogan joined the conversation

Sharon Mizota - 11:00 AM

Hi everyone! Welcome to the Visual Materials Cataloging & Access Google Hangout.

reply-103781601713330080096@profiles.google.com joined the conversation

reply-113979504483664620375@profiles.google.com joined the conversation

Ashley Levine - 11:00 AM

Hey Sharon!!!

reply-113049856922586288706@profiles.google.com joined the conversation

Sharon Mizota - 11:01 AM

Today we're discussing Writing Cataloging Guidelines. (Hi Ashley!)

Ashley Levine - 11:01 AM

And everyone!



Naomi Frantes joined the conversation

reply-118078409276697949121@profiles.google.com joined the conversation

Sharon Mizota - 11:02 AM

I hoping this can be a fairly casual conversation, but I'll ask a question to get us started: What formats have you found most useful in creating and disseminating your guidelines?

reply-103581638366590536657@profiles.google.com joined the conversation

nikki oder - 11:04 AM

We are just starting to create a manual for cataloging procedures that will probably be printed and distributed to each member of staff, however we did consider trying to build these types of instructions into our database system rather than having a separate manual.

Helen Baer - 11:04 AM

I use a combination of wikis and Word docs. The latter are for when I think I might need to share the documentation outside my department.

Elizabeth Cathcart - 11:05 AM

I use Wordpress and Word docs, but only because I cannot write them into the database.

Melissa Robohn joined the conversation

Ashley Levine - 11:08 AM

I've disseminated a PDF document to staff. However, as a lone arranger, I found it very helpful to present the guidelines to my colleagues, to show how they apply to our work (also was a good way to advocate as a lone arranger)

reply-116105441725294981342@profiles.google.com joined the conversation

Jean Fernandez - 11:08 AM

does anyone have sound?

Naomi Frantes - 11:09 AM

are we supposed to have sound and video?

Sharon Mizota - 11:09 AM

I'm the host and can't do sound or video because of our firewall. Sorry.

Jean Fernandez - 11:10 AM

are we going to have sound or video at some point?

Sharon Mizota - 11:10 AM

If someone else wants to host a future hangout, that would be great!

Wendy Scheir - 11:12 AM

To answer your question with another question: how do people deal with version control? We add to our guidelines continually; some are in Google docs, some Word.

Kacey Donner - 11:12 AM

We don't have cataloging procedures, but PastPerfect has some procedures written into the program. If the cataloger does not know what information to type into a given field, they simply click their cursor into the box and press F7. An explanation pops up of how to fill in the field.

Wendy Scheir changed the topic to **Wendy**

Wendy Scheir changed the topic to **Hangout with Ashley Levine, Matt Moryc, Jennifer Hecker and 32 others**

Helen Baer - 11:15 AM

About version control, the better wiki programs will give you change logs but really to make it work well, you have to slice up your guidelines to make each section get a new date stamp. This hasn't been practical for me, so I just update the wiki. We do keep superceded documentation when it's in the form of Word docs.

Elizabeth Cathcart - 11:16 AM

I do the very basic of "Last updated on such and such date" footnote

Helen Baer - 11:16 AM

I should do that Elizabeth!

Robin-Elise Call joined the conversation

Laura Saegert - 11:18 AM

I have created a few catalog records in the past couple of years in our cataloging system - SIRSI; using MARC/RDA guidelines, with AAT terms for formats. Catalog records are derived from an EAD/DACS compliant finding aid. We will soon be embarking on a large photo cataloging project and were hoping to see what others have done, especially in the use of index terms. Also, we will be describing collections of photographs for the most part, but there are a few occasions where we do describe individual items. Any digital collections of photos are going up in our Texas Digital Archive. The index terms change a bit because Dublin core is the basis on our online system, but we can use other sources. I do have a manual for cataloging archival records and we have created a cheat sheet of the most commonly used AAT terms. We are open to other approaches.

Elizabeth Cathcart - 11:20 AM

For subject terms, I have a spreadsheet that we've added to over the years of TGM, AAT, and some LCSH. The only reason I still use it is that more departments with "other" subject terms are now in the same system. This way you can search in the spreadsheet to ensure it's a term that other photos have used

Laura Saegert - 11:20 AM

We have bi-weekly metadata meetings to discuss changes in procedures, new issues in description, to encompass terms in finding aids, catalog records and our online collections. Our manuals are updated periodically and keep in a central spot on our server for easy access.

Elizabeth Cathcart - 11:22 AM

And my guidelines have gotten quite lengthy. Word Doc or PDF is nice to be able to search for what guidelines you are looking for, but it's still rough around the edges, I feel. I just am unsure how to make it more compact with still encompassing all that needs to be in it. I've broken it out by sections, but again still can just be overwhelming with the length

Sharon Mizota - 11:22 AM

How are your guides organized? Is it field-by-field? Or by task? Or?

Laura Saegert - 11:23 AM

Our manual is organized by task, then fields.

Elizabeth Cathcart - 11:24 AM

All of the above. First section by field. Next by task. And then the "Notes" where there are tips on images that we sometimes catalog but rarely get.

Marcella Wiget - 11:25 AM

Elizabeth, I started creating a checklist of basic, specific things I wanted to make sure got done because our manual is so lengthy and full of information. Most of the information is "in this scenario, do this"; "if you find this in a collection, do that" and so people forget to do the basic stuff. This is also just our overall processing manual--I don't even have anything specific for cataloging and describing photos!

Elizabeth Cathcart - 11:27 AM

Marcella, I have a lot of those too! That's why the first section is by field, so it's the minimal of what should be done on the "normal" photos.

Sharon Mizota changed the topic to **VMCA Google Hangout - Writing Cataloging Guidelines**

Wendy Scheir - 11:29 AM

We

Laura Saegert - 11:29 AM

I did the same, created a checklist. Then, I created a list of standard phrasing used in records so I can cut and paste those sections when needed. For example, for the RDA fields of 336, 337 and 338 once you get past paper records, there are various options for photos, microfilm/fiche, audio, video and electronic records. I have listed the most common entries on the sheet for each of the above types, which saves me the trouble of constantly looking up the options.

Wendy Scheir - 11:30 AM

We've established a minimum basic cataloging standard--nothing can be published without these being completed and checked; then an enhanced standard for collections that warrant it.

Marcella Wiget - 11:31 AM

In ArchivesSpace, we have some macros for some of our common phrases in notes and other sections of the finding aid that I encourage everyone to use for consistency. I also know our catalogers have macros they can use for some of those more standardized fields.

Laura Saegert - 11:31 AM

I just realized that my posts are showing up without a name, not sure why. So, the nameless posts belong to Laura Saegert

Elizabeth Cathcart - 11:32 AM

Thanks for bringing that up Marcella, I encourage using macros for standardized verbiage in free text fields, and use them constantly.

Wendy Scheir - 11:32 AM

Dropdown lists -- this is especially good when students are doing some of the cataloging.

Marcella Wiget - 11:33 AM

Yes, my supervisor set the macros up before I came and they are SO helpful. I need to experiment with a few more really!

Sharon Mizota - 11:33 AM

Laura, I can see your name and have been able to throughout.

Marcella Wiget - 11:33 AM

If I have somebody working in a spreadsheet, dropdown lists are so useful.

Sharon Mizota - 11:33 AM

All, largely hypothetical, but if you had your druthers, would the guide be completely embedded in the cataloging interface?

Jennifer Hecker - 11:34 AM

Oh, heck yeah!

Elizabeth Cathcart - 11:35 AM

I don't think embedding it would be practical for the vast amount of info. But I do like what someone mentioned above that you can F7 for tips on a field, that would definitely be helpful!

Wendy Scheir - 11:35 AM

I don't know. It might be cumbersome. But we have the ability to create custom views by project, limiting number of fields appearing on screen. Again, helps to iimit too much creativity

Laura Saegert - 11:36 AM

This is my first google hangout, so please forgive my inexperience. We are starting to use ArchivesSpace, which will be great for pulling out terms from those lists that we know already have authority records. I will be experimenting in coming weeks with creating catalog records for our catalog system from ArchivesSpace. Has anyone done that? Are there a lot of edits needed?

Marcella Wiget - 11:36 AM

For the basics, yes, but sometimes it can be a complicated decision-making process and I'm not sure that would translate well into being embedded in the interface itself

nikki oder - 11:36 AM

We are hoping to create a manual that encompasses cataloging guidelines as well as accessioning, handling, labeling, and preservation methods - more of a general collections manual with a cataloging section. We are considering baking some of the cataloging procedures in, but I don't know how to fit some of those topics into a cataloging system (ex: proper handling technique for different asset types)

Wendy Scheir - 11:37 AM

We've created MARC records from Archivist's Toolkit records -- yes, verrrrry edit-intensive. Hopefully ArchivesSpace makes that an easier process.

reply-105992388013028443488@profiles.google.com joined the conversation

Sharon Mizota - 11:38 AM

Have had trouble getting people to follow the guidelines? What strategies have you used to foster adoption/adherence?

Helen Baer - 11:39 AM

LOTS of feedback during the training period. And hiring people who are suited for the work.

Wendy Scheir - 11:39 AM

And limiting their options (dropdowns, macros, limited fields displayed) and making them QC their own work

Elizabeth Cathcart - 11:40 AM

"Because I said so!" No, just kidding. Lots of reminders of where to find the info I created and working with people to see if the guidelines may need some updating in case things are confusing.

Kacey Donner - 11:43 AM

Nikki, instead of creating a field that describes how to handle the object, perhaps you can note handling instructions in the "object condition" field.

nikki oder - 11:44 AM

Thanks for that suggestion, Kacey! I'll keep that in mind

Marcella Wiget - 11:46 AM

Hey Laura, just saw your question about creating catalog records from ASpace records--we definitely have to make edits from the MarcXML that ASpace generates, but I feel like it's what you would expect, not hugely intensive work. (I don't actually do that piece myself, but we just set up those procedures & I was involved in the writing up how to do it.) Mostly fixing delimiters and standardizing to RDA/our local cataloging rules.

it's also still early days for our procedures, so I could be entirely wrong about it not being too intensive 😊

Sharon Mizota - 11:47 AM

I've been writing our guidelines bit by bit and reviewing them in chunks regularly with staff. It makes the writing slower but seems to foster adoption. This conversation is making me realize I will have to be better about version control, though!

Laura Saegert - 11:47 AM

Thanks Marcella, hopefully this process in AS to Marc will run smoothly.

Sharon Mizota - 11:51 AM

We've got about 10 minutes left - any other helpful tips to share? Or burning questions?

Also, I would like to keep a copy of the conversation and perhaps post it on our Section web site. Does anyone have any objections?

Laura Saegert - 11:52 AM

Fine with me

Thank you for organizing this Sharon.

Marcella Wiget - 11:53 AM

No objections

Elizabeth Cathcart - 11:54 AM

Yes, thanks Sharon for organizing.

Kacey Donner - 11:54 AM

Thank you.

Ashley Levine - 11:54 AM

Yes please save and post!

Naomi Frantes - 11:54 AM

FYI, I have been able to hear someone throughout this hangout.

Melissa Robohn - 11:54 AM

This has been very helpful

Marcella Wiget - 11:55 AM

Re: version control. I rewrote a LOT of our manual about 1.5 years ago, and we used the footnote versioning to indicate when the manual was created and updated. We also added a change sheet at the beginning of the manual to start indicating which sections were updated when since that massive rewrite because I'm really, really hoping nobody has to rewrite the whole thing ever again. (Probably a foolish hope)

Elizabeth Cathcart - 11:56 AM

I like the idea of a change sheet, thanks Marcella!

Marcella Wiget - 11:59 AM

Thanks for hosting this, Sharon & the section!

Sharon Mizota - 11:59 AM

Thank you all for participating! Please send any feedback to the listserv, or directly to me: sharon.mizota@disneyanimation.com. Happy cataloging!

nikki oder - 11:59 AM

Thanks, Sharon!

Ashley Levine - 12:00 PM

Thanks so much Sharon! This was great!!!! 🙌

Naomi Frantes left the conversation