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A positive impact during COVID-19 pandemic: a virtual cataloger's experiences

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Is virtual working possible for cataloging?

Remote working from home has been the trend since the lockdown orders were in place in the United States in the beginning of March 2020. As a result, many businesses, including library services, have become digitally accessible. Wait a minute! Am I included in this sphere? As a library cataloger for hard objects, getting access to a physical setting, like libraries where the materials live, was supposedly a prerequisite for conducting my job. Therefore, I thought I would be standing outside the-box of this technological advance, for quite a long time. Then, not long after, under these unusual circumstances of the pandemic, all library services had to turn virtual. I guess that at this abnormal time, there is a *new normal.* I had to find a way to go with the flow.

To speak frankly, I would have been at the end of my wit's end in coming up with a workable adaptation to this *dreadful* situation if tide and timing had not been on my side. The tide was that our aging library system of twenty years was scheduled to move to a cloud system this year. The good timing was that extensive webinar training sessions of the new environment and comprehensive modifications of existing records by cataloging staff happened to coincide with the duration of library closings. As a result, the cataloging services of Hunter college, which is part of the network of the CUNY library system, turned out being fully digital, to a satisfactory level, during this period. This essay briefly depicts the experience of such a migration and the lessons I learned along the way.

Migration from <u>Aleph</u> to <u>Alma</u>: personal initial dilemma

The CUNY library system is a large consortium, with over twenty libraries under its umbrella, so it goes without saying that a changeover from a library services platform, aka <u>Aleph</u>, to a cloud environment must be a tremendous project. As a matter of fact, the planning stage, including the system selection, purchasing negotiations, and licensing issues, etc., was already many years' efforts in the making. At long last, all the barriers had been removed, and subsequently the contract of a new system had been finalized. The staff members of CUNY libraries were overjoyed with open arms to welcome the implementation of a renowned cloud-based system—<u>Alma</u>, owned by *ExLibris*.

The kickoff of the migration process was held in January of 2020, and the go-live date of Alma was scheduled on August 3rd, 2020. However, upon having a glimpse at the large chasm of the difference between these two systems, I had more anxiety and stress than excitement and faith about smooth sailing into Alma. At that point, I puzzled over how the method of narrowing the gap would work with our foundation system of Aleph and was also dubious about my own capabilities to have a firm grasp of new technologies.

In other words, our old library catalog needs serious specification adjustments. In the meantime, it is almost out of the question that my cataloging department with a skeleton staffing can carry out this kind of heavy workload. To make matters worse, we urgently needed to spend time in familiarizing ourselves with a totally different cataloging system by viewing an army of training recordings

and flipping through reams of documentations. With a desperate mindset, it was in my plan that in order to be away from the office and focus on strenuous studies of those documentations and doing record modifications at my home computer, I would start, beginning from March, to make best use of my own vacation time for this purpose.

Unthinkably, my intention was brought to life by NY Governor's order that the whole CUNY system had to be closed effective March 9th. Given an extreme paradigm shift from trucks of materials waiting for processing to absolutely no materials on hand to do, we could afford to concentrate on Aleph records adjustments from home and learning the skills of Alma, just as I had wished for.

By being occupied with these tasks, both my staff and I remained busily connected with our duties, and moreover we managed to do our due diligence to meet new challenges. In this case, not only did my dilemma disappear, but also the perfect answer to the question whether catalogers can work from home was a resounding YES.

Full training support from *ExLibris*

Alma, a unified system, covers different modules of library operations but all of them are interrelated. During the implementation stage, plus a short period after the implementation date, ExLibris offered the complete customer support system,

through either online training sessions or live weekly functional zoom meetings with various subjects.

Since I had been designated as one of three members of Hunter migration team, it was my wish to acquire a well-rounded knowledge of this new system despite the fact that it was near impossible to get away from the calling of my daily duties. With the unexpected freedom of work time management, I had the opportunities of attending almost all the scheduled webinar sessions available for CUNY staff.

To reflect, I am deeply indebted for the advantages to acquire a diverse set of skills and knowledge that equipped me to have the capabilities to provide the service to the college community in the future. This contingency also furthered my own learning of cloud technology in general. The following is, in a nutshell, how they perfectly complemented my extensive experience in library cataloging operation.

Learning skills required for cataloging with *Alma*

As a matter of fact, descriptions of this section *should* be the heart of working from home, and also the essence of this essay, because the skills learned for the past few months are the most important and hard earned knowledge we need to retain to perform our job in the future. I do not intend, however, to get to the details here,

since I am not writing for the purpose of documentations. Nonetheless, the listed items would show a bit how deeply involved we were to the Alma trainings.

Below is simply a concise summary (without any technical details) of what we were expected to do when we used Alma to do cataloging.

First, a general practice for cataloging covers these three domains:

1) Getting the correct bibliographic record (either from Acquisitions or outside resource)
2) Creating an inventory (items & holding) based on this record
3) Browsing the shelf listing to check the uniqueness of the call number

To integrate the above elements with the Alma environment, the cataloging job may also include (but not be limited to) a thorough understanding of the following items from the Resources module

1) Adding inventory to a shared bibliography in network zone (NZ)
2) Adding local fields (applicable to Hunter) to a bibliography record in NZ
3) Sharing a record in Hunter zone with NZ
4) Linking a full level record to a brief level record (with acquisitions information)
5) Moving inventory information to a different bibliography, if needed
6) Understanding acquisition workflow to receive and send work order after processing

After studying from the *ExLibris documentations*, learning from many training recordings, plus discussing with the Alma training team in CUNY, I am confident

that I can perform cataloging with *Alma* as well as I did with *Aleph* in the past. In the meantime, I also encouraged my cataloging staff to study the learning materials and I coached and related to her, via Zoom or telephone conversations, on a weekly basis. Though we were kept apart by the pandemic, we still stayed as close as we were working together in the Library for the past few months.

Actively working on CUNY Aleph record modifications

As stated above, Aleph was our university library integrated system with a history of over two decades. Understandably, there is a huge technological difference between Aleph and Alma. Naturally, before implementation of Alma, tremendous changes and transformations had been essential to take place. Back in 2018, the university central computer office (OLS) had already laid out a slew of Aleph records cleanup projects in a *Libguide* entitled as *Aleph catalog optimization projects* as a guideline for all the CUNY campuses to make catalog record adjustments.

Of course, my staff and I understood the importance of this undertaking, but our department was unfortunately handicapped, due to library financial constraint, by insufficient helping hands. As much as we tried, whenever time permitted, to do the necessary record modifications, before the library lockdown thousands of records with the requirements of changes were still left untouched.

Although we felt apologetic for not pulling enough weight in the process of preparations, my staff and I were being bound by daily routine to process newly acquired physical materials in serving library patrons while working in the office. Ironically, lockdown of the Library provided a solution to our problem of time and staff shortage. It may not be an appropriate analogy, but the scenario at our operation reminds me of a well-known saying "*Profiting from a piece of misfortune*"

Undoubtedly, online retrospective maintenance work was a cumbersome and less inviting task, in comparison with handling new materials in the Library, and I missed the joy of old days when we could make new materials available to library patrons in a speedy way. The substitute comfort was, however, obtained by the occasion of re-visiting the <u>Libguide</u> and combing through the incomplete housekeeping work to mark them as "done", one by one until we got to the end of the list.

In 2020, a great majority of Americans have experienced lives upside down, and it seemed that nothing good was coming as expected. Honestly, I had the same frustration in conducting my personal life. However, my unhappiness was fortunately compensated by the achievements in work life. With the targets being reached, I would be able to exhale a relief that Hunter libraries did not migrate a messy online catalog to a supreme cloud system, and our efforts have lived up to the expectations.

Conclusion

How much longer will my virtual working arrangement last? It is nearly impossible to set a rule which can fit all conditions, while universities, colleges, and academic libraries across the country are facing the tough decisions on the method and timeline to resume onsite learning, instructions, and services. At this point, many things seem at the crossroads, and the results would vary in a whole spectrum. I stand ready for the day when my office is re-opened for onsite working, because, to me, the enjoyment of working with physical materials on hand and providing services to library patrons **in person** is irreplaceable.

While there is so much uncertainty for the road ahead, my own memorable period of complacent and fruitful remote working experiences for the past few months has been and will always be a treasure in my heart. I really appreciate this situation to witness and participate in launching cataloging and library service at large into the future, especially as we are ushering this new technological era of remote working and learning in an unprecedented and uncertain time.

One of my favorite novels is British classics: *A Tale of Two Cities*. Though I can't recall that much from this famous masterpiece, two sentences written within "*It was the worst of times, it was the best of times*", had always helped to provide me with much needed encouragement when I experienced obstacles, ever since I read this book. They are vividly portraying what I have gone through during the COVID-19 pandemic in 2020, and I believe it is a sentiment shared by many of my colleagues in CUNY as well.

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