

## Novels in Series Project Final Report, August 2021

### Background

Novels in series form an important part of the library's fiction collection. Many readers want to read them in sequence and find out quickly which titles the library has in its collection. In August 2016 the Series Project was initiated to improve access to novels in series via the Polaris online catalog. Since Polaris contains search results screens that enable users to browse by authors and series titles, enriching catalog records with consistent entries seemed like a good way to make the desired materials more accessible.

### Procedures

In the first year only 490 and 800 MARC fields were established for each series processed. Because the MARC cataloging editor in Polaris operates in full screen mode, it was possible to copy and paste the headings established in the editor into an external resource file, which was stored on a library server. When another volume in the series was processed, the established headings could be copied and pasted from the resource file back into the editor. As the number of series processed grew, this procedure made treating established series increasingly efficient. By the middle of August 2021, 5346 series representing almost 2500 authors had been treated.

Because the Polaris MARC editor allows multiple records to be open simultaneously, the headings for a given title could be copied from one record to another. This made it possible to insure consistency among all formats of a given work irrespective of whether it was a printed book, an ebook, a large type book, an audiobook, or an e-audiobook. Overdrive records, in particular, benefited from this procedure because they tended to be skeletal when it came to series, subject, and genre headings.

When series were established, not only were they added to the resource file, but the authors were added to an author list. Both series titles and authors' names were checked in Polaris to see whether they were formatted consistently. Browsing forward or backward in the search results screens would often turn up additional titles that needed attention.

In subsequent years additional fields were created for each series processed: 6xx fields for character, place, topical subject, and genre headings, 700 and 740 fields for added authors and titles, as well as 400, 430, and 5xx fields in authority records for cross references. In addition, old forms of authors' names were updated to current forms and corrupted words containing foreign language characters were corrected.

In the early years of the project series selected for processing were based on circulation activity and the number of series for a given author found in the stacks. As the series for established authors became complete, focus shifted to materials on the New Book and Hold Shelves. By the time the pandemic set in, it was possible to focus almost entirely on new records added to the catalog. This made it possible to keep up-to-date by working in the catalog from home instead of monitoring circulation activity or the New Book and Hold Shelves.

### Derivative Projects

Looking at new records by control number is not an efficient way of determining which need to be upgraded because there is only an abbreviated title on the Polaris search results screen. Opening and closing each record in sequence is a time consuming process.

To make the process more efficient I decided to convert the new records into a web page, which can be scanned quickly for candidate records. Adapting a procedure used in the Digital Signage project, I exported the new records from Polaris, converted them to XML with MarcEdit, sorted them by title, and wrote a JavaScript module for a web page which converts the XML into HTML.

Each record in the web page occupies about two lines (title, author, series, material type, and a link to the Polaris public interface) and hovering the pointer over the title opens a pop-up box containing the notes field. This provides sufficient information to determine whether the records need to be upgraded.

From this development it was an easy step to adapt the web page of new records as a New Titles list. While the Polaris public interface contained four carousels that displayed a small number of recent titles through cover images, it did not provide a comprehensive list of newly acquired items. Creating a web page for New Titles offered something more comprehensive (about a thousand recent titles) and flexible (users could scan the page rapidly and link back to the public interface to place a hold). In the end two web pages were created, one for print materials and media and another for electronic titles. Both were integrated into the library website.

This approach could also be used for specialized bibliographies, such as lists of works in the collection by author, series, or subject. Several prototypes were developed and referenced from the EPL project page of my UNI account:

<https://sites.uni.edu/caswell/epl/>

#### Transition to Atrium

After training in Atrium was received, time was spent exploring the cataloging interface to determine whether the procedures established in Polaris were transferable. Atrium is a new generation system with web interfaces for both staff and public functions. The cataloging interface uses web forms, which require that each component of a MARC field (tag, indicators, and subfields) be entered separately. Copying and pasting complete fields from one record to another or between records and the resource file is not possible.

Fortunately the public interface supports catalog enrichment services and EPL has chosen to integrate Syndetics Unbound into it. This service will provide access to series information from individual titles in search results. The catalog enrichment tool is very attractive and should appeal to a great number of users.

In addition, the bookbag feature of the Atrium public interface enables New Titles lists and specialized bibliographies to be created and published on the homepage. This should enable library staff to easily create lists of various types that will benefit users.

Because Atrium can provide such services without specialized programming, it has been decided to terminate the Series Project and its derivative projects.

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18 Aug 2021