HOW DB JOHNSON LOST HIS ARM AND WHY IS IT A SUBJECT HEADING?

Harvesting and change management in repositories

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THE REPOSITORY

Digital Commons @ Winthrop was launched in January 2015

Started out mainly for archival content

We’ve added conferences and student works. These include journals, newspapers, and graduate theses

Started harvesting in 2016. We harvested our oral history collection, using the Digital Collections Gateway, into OCLC and our library catalog, WMS
FAST FORWARD TO 2020

Moved to a statewide ILS – Exlibris Alma/Primo

Opened up the opportunity to harvest our repository content directly into our discovery layer

Awesome Right?
WELL...

UH OH

What we found was that we needed to do a few (alot!) customizations and updates to make harvesting as clean as possible.

While we were already using the Digital Collections Gateway, it was really just a way to quickly provide access to repository materials through the catalog.

Photo from: https://www.eonline.com
A REAL LIFE EXAMPLE

https://pascal-winthrop.primo.exlibrisgroup.com/permalink/01PASCAL_WINTH/tdpbth/alma991000006389705661
This image is of Winthrop Founder and First President David Bancroft Johnson from the early 1880s.
FINDING A STARTING POINT

Identified current mappings for test collection

Make edits and add additional fields if needed

Catalog view of item harvested directly into discovery layer

https://digitalcommons.winthrop.edu/do/oai/?verb=ListRecords&metadataPrefix=dcq&set=publication:oralhistoryprogram
<table>
<thead>
<tr>
<th>Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Interview with Vernon Jordan</td>
</tr>
<tr>
<td>Creator</td>
<td>Jordan, Vernon E. (Vernon Eulion), 1935-</td>
</tr>
<tr>
<td></td>
<td>Cooke, Michael A.</td>
</tr>
<tr>
<td>Subject</td>
<td>Jordan, Vernon E (Vernon Eulion), 1935-</td>
</tr>
<tr>
<td></td>
<td>South Carolina Legislative Black Caucus</td>
</tr>
<tr>
<td></td>
<td>Oral histories</td>
</tr>
<tr>
<td></td>
<td>Interviews</td>
</tr>
<tr>
<td>Genre</td>
<td>Interviews</td>
</tr>
<tr>
<td>Description</td>
<td>IN PROCESSING</td>
</tr>
<tr>
<td>Creation Date</td>
<td>1985</td>
</tr>
<tr>
<td>Source</td>
<td>Library Catalog</td>
</tr>
<tr>
<td>NMS ID</td>
<td>9910000003509705661</td>
</tr>
</tbody>
</table>

Worked with cataloging to start adding subject headings to select collections. (Oral Histories)

Also worked to revise skeleton marc records for collections harvested through the gateway.

This initiated cross departmental collaborations but also helped them become invested in the project.

Instituted a lockdown on collections that we identified as needing more clean-up than the others.
It became more important than ever to educate all parties on harvesting and the importance of their role and why this should be and is a shared goal.

Operating in a cylo was no longer an option because the impacts were further reaching.

Created documentation that gives a high level overview of our specific harvesting process.

Meeting with our repository consultant.

Becoming Alma and Primo Certified.
PROCESSSES

Process #1:  
Digital Commons ➔ Digital Collections Gateway ➔ ILS

This mediated process creates a skeleton MARC records with OCLC numbers. During the intermediate step (Digital Collections Gateway), Cataloging/Metadata staff populate the MARC records with additional details before the records are visible in OneSearch. Because this process creates MARC records, these records are included in Alma. The harvesting process checks for and adds any new records, but does not make any changes to the MARC records.

Process #2:  
Digital Commons ➔ Primo/ILS

This automatic process harvests all collections excluding those harvested through the Digital Collections Gateway (Process #1 above). Records information is harvested directly from the Digital Commons into Primo VE using the harvesting tool in Alma. Currently all collections and titles in DC are harvested in to Primo, including the records harvested through the Digital Collections Gateway. Harvested records are available immediately in Primo. Legacy systems and processes create duplicate records for some items/collections.

NEW PROCESSES AND PROCEDURES: COMMUNICATION

DC Workflow for notification:
Did you make a change?

Changes in Digital Commons

- Does this item have a bib record?
- Is this item part of the Oral Histories or SC Mother of the Year collections?

Yes: Send changes to metadata and cataloging.
   ONLY changes to:
   Title
   Author
   Description
   Content
   Note/Scope
   Keyword

No: Please continue to adhere to the standards for changes in either system.

Changes in MARC Record

- Does this item have a Digital Commons Record?

Yes: Be sure to communicate changes to the Assistant Director of Archives.
   Changes to:
   Graduate Theses
   Honors theses

No: Please continue to adhere to the standards for changes in either system.
Creation of Metadata Task Force with the following charge:

This task force will deliver recommendations for metadata practices and procedures for the Digital Commons based on research, current standards, and through collaborative discussions. These recommendations will particularly examine how these practices will impact end user discovery and accessibility of Digital Commons content, but not limited solely to that consideration.

The task force has been looking at other universities and our state digital library.

Spoke with our Bepress consultant, who gave an overview of harvesting and how the process works for our system at a high level.
CHALLENGES

**ILS Migration**

Digital records were not taken into account in our test load so we were unable to see how previously harvested materials would display in the new system.

**Staffing**

Learning a new system

**Resistance to Change**

Some of the steps we needed to take involved a change in process.

It also involved the creation of new processes.

We now have 3 areas of the library who need to work relatively closely together when before, collaboration was minimal.
Covid-19

Need I say more?

The transition to remote took precedence over all other projects.

With different levels of technology and internet access among employees. Progress was slow.

Institutional

Transitions in leadership
WHERE WE ARE NOW & FUTURE PLANS

- Taskforce is providing recommendations
- Finalizing processes so that collections can be unlocked
- What does this process look like as we continue working from home?
- Planning for a major update to implement new standards

- Fix duplicate records caused by harvesting through two platforms
- Continue to educate.
- Collaborate with other libraries in the state
- Breathe
QUESTIONS OR SUGGESTIONS?

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00:29:56 - To find answer to how D.B. Johnson lost his arm click the icon.