



# BLUEcloud Cataloging



# AGENDA

- *Introducing BLUEcloud Cataloging*
- *System Requirements*
- *Let's Take a Look*





# Introducing BLUEcloud Cataloging

- First BLUEcloud Staff product
- Holding Steady with 400+ Customer Installs
- Focus on Copy Cataloging
- 2017: Infrastructure



# System Requirements

- Current Symphony Environment (3.5.2 SPI Recommended)
- Current ILSWS
- BLUEcloud Staff ID
- BLUEcloud Institutions
- BLUEcloud Cataloging Roles and privileges
- Symphony User permissions

## But what about the Underlying ILS?

- BC Cataloging Roles/privileges offer more granularity than ILS policies
  - Edit control/fixed fields but not variable fields or vice versa
  - Add bibliographic fields but don't allow deleting
  - Edit call numbers but not items. . . .

## But what about the Underlying ILS?

- The ILS still has final say
  - ILS "institution" or "station" context sent to ILSWS via institution context chosen
  - BC Cat may say a staff member can edit bibliographic records
  - If underlying ILS staff record (linked through BC Staff ID) doesn't have those permissions, record save will be rejected
  - Sites that have established access to add, edit, delete call/item details by library/library group will also see those policies maintained on record save
- See BC Cataloging Setup Guide for Additional Details

# Current Features

- Searching
  - Faceting
  - Shelf Browse
  - Targeted searching
  - z39.50 searching

# Current Features

- Original Cataloging
  - Bibliographic Templates
  - MARC Editor features
    - Field and subfield helpers
    - RDA Toolkit and LoC helper



# Current Features

- Copy Cataloging
  - Smart Search + Side By Side view
    - Drag and Drop
    - Merge and Replace
  - z39.50 Import

# Current Features

- Managing Holdings:
  - Add and edit Call number and copy records
  - Copy Item
  - Batch Item Add
  - Batch Item Modify
  - Delete bibliographic record and associated holdings

# Current Features

- Administration
  - BC Catalog Roles vs. ILS Roles
  - Bibliographic Template policies
  - Smart Search policies
  - Merge + Replace policies
  - Catalog profiles

# Demo: BLUEcloud Cataloging

- *A quick review of current BLUEcloud Cataloging features and functionality*



**Cataloging**



# Upcoming Features



# Upcoming features: Long Term

- Long Term Roadmap:
  - Real Time Indexing
  - Add Item Delete Support
  - Bibliographic Import
  - Support for Symphony Policy Lists
  - MARC map updates
  - Browse Searching
  - Authority Control
  - Additional basics like spine and book labels
  - Item Group Editor

# Enhancement Requests

- Support Custom Policy Lists (Symphony)
- Match at beginning or end in Merge and Replace
- Offer option to display Codes or Descriptions for drop down menus such as Collections

