

Out of the Weeds: Effective Cataloging Tools and Strategies for a Post-CRDP World

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In August 2024, the Government Publishing Office (GPO) announced the discontinuation of its Cataloging Record Distribution Program (CRDP), a critical service for federal depository libraries. Since its launch in 2009, the CRDP has cataloged government documents and provided essential cataloging metadata to support Federal Depository Library Program (FDLP) libraries. However, due to the transition to digital collections and the increasing use of electronic resources and metadata formats like MARC, XML, and linked data, traditional print-based cataloging methods are becoming less aligned with modern library practices. As a result, GPO has decided to end the program.

In addition to GPO's decision, MARCIVE, a long-time provider of cataloging services, announced it would cease operations. This adds to the challenges faced by libraries that have relied on MARCIVE for cataloging government documents, underlining the broader changes occurring in the cataloging field. As noted in GPO's August communication, "LSCM has recently reviewed the CRDP and recognized that there have been many changes in the discovery and metadata/cataloging ecosystem since the CRDP was implemented."¹ This announcement highlights the growing diversity of metadata sources and the modernization of library workflows in the digital era. As a result, GPO is encouraging libraries to explore other cataloging alternatives and digital content management systems.

These changes will significantly impact libraries that have relied on the CRDP for cataloging government documents. Without both CRDP and MARCIVE, libraries will need to seek new sources for cataloging records or adjust their workflows to ensure continued access to government publications. While GPO reassures libraries that their FDLP status will remain unaffected, it emphasizes the importance of transitioning to other cataloging solutions or content management systems before the program concludes.² Given these shifts in

federal document management, libraries must adapt to new cataloging methods and tools. This paper will explore effective cataloging tools and strategies to help libraries transition away from the CRDP and MARCIVE, ensuring continued access to government publications and the efficient management of digital collections.

History of MARCIVE and the CRDP

Founded in 1981, MARCIVE quickly established itself as a leading provider of cataloging services for libraries across the United States. Initially, the company focused on cost-effective MARC bibliographic cataloging, but as technology advanced, MARCIVE expanded to offer more modern solutions tailored to the evolving needs of libraries.

In the late 1980s and early 1990s, MARCIVE identified a significant gap in the cataloging of government documents. Many libraries, particularly academic institutions, needed help managing large collections of U.S. government publications. To address this, MARCIVE launched a multi-year initiative in partnership with major libraries like Texas A&M University, Rice University, and Louisiana State University to enhance the bibliographic data generated by GPO, marking the beginning of its specialized services for government documents.³

By the mid-1990s, MARCIVE had become a key partner in government document cataloging. Working alongside the GPO, the company helped develop the CRDP, which provided depository libraries with standardized bibliographic records for U.S. government publications. The CRDP streamlined cataloging processes, ensuring consistent access to government records across the FDLP network.

The CRDP became an essential tool for libraries, particularly smaller institutions or those without dedicated cataloging staff. This collaboration allowed libraries to maintain accurate, up-to-date records of U.S. government publications. As the format of government publications shifted from print to digital,

MARCIVE adapted to include these new resources in the cataloging process.

The closure of MARCIVE poses significant challenges for libraries that depend on its services. With the end of the CRDP, many FDLP libraries will need to find new vendors or adopt alternative tools to ensure the continued cataloging and accessibility of government publications. Libraries are increasingly turning to digital resources and automated cataloging tools, and the traditional model of centralized cataloging services is being replaced by more flexible and diverse resources. Libraries will need to adapt to these new systems, which may require an adjustment period, but the transition offers an opportunity to explore innovative approaches to government document management.

New Strategies and Tools: Background

At the Fall 2024 FDL Conference, GPO, the Depository Library Council (DLC), and federal depository libraries discussed their concerns about the end of the CRDP and explored possible alternatives. At this conference, we presented “Adapting to Changes in Government Information Management: Strategies and Tools to Keep You Out of the Weeds,” which focused on practical, low-cost strategies for libraries to receive metadata and MARC records, as well as guidance on developing efficient workflows for managing government information.⁴

Mastering Excel-Based Queries: Efficient Cataloging with Customized Search Tools

A key consideration for cataloging workflows and record selection is whether a library aims to collect government information broadly or focuses on specific areas of emphasis. Some libraries may take a hybrid approach, collecting broadly while also seeking comprehensive coverage in particular subject areas. For those adopting a more targeted collection strategy, advanced search techniques can help efficiently identify relevant cataloging records from lists and databases. This approach offers greater precision and allows libraries to allocate staff and resources more effectively toward developing specialized collections.

With the discontinuation of MARCIVE and CRDP services after December 2024, libraries must explore alternative methods for ensuring government information remains accessible to their patrons. This transition involves a two-fold process: first, selecting the most relevant and impactful government information based on the needs of their users; and second, determining the best ways to disseminate and make this information readily available.

Making cataloging more accessible can be achieved through various methods, such as creating library guides (both online and

physical) or linking to the Catalog of Government Publications (CGP). Adding government documents to the library’s main catalog has also been a popular approach for increasing visibility and accessibility. However, there is no “one-size-fits-all” solution to cataloging government information, as each library has a unique mission, serves distinct users and communities, and operates within specific financial and staffing constraints.

Many libraries are selective depositories and only catalog some new GPO cataloging records.

A widely used method that allows libraries to create customized item selections is DSIMS.⁵ The Depository Selection Information Management System (DSIMS), introduced in 2012, replaced the older Depository Distribution Information System (DDIS), which had been in use since 1982. In DSIMS, item selections are matched to SuDoc stems, creating a one-to-one ratio. Recently, the GPO introduced an initiative adding 900 new item numbers, providing libraries with greater flexibility to make selections based on geography and format. This change allows libraries to achieve greater precision in their item selections, which can be reviewed through GPO’s Item Lister.⁶

Another approach to selecting cataloging is to create a list of keywords relevant to topics important to a library’s region and users. Libraries can match these keywords against government document cataloging lists and tools such as New Electronic Titles (NET).⁷ Additionally, they can utilize combined shipping lists via FDL.gov.⁸ Another option would be to create lists through MetaLib, which is available through the CGP.⁹ For libraries focusing on specific collection areas or topics, keyword searches of cataloging lists and tools alongside DSIMS can help ensure that no relevant items are overlooked.

The discontinuation of MARCIVE services served as a catalyst for exploring new methods of performing advanced searches. Clearly, having tools capable of querying spreadsheets for multiple keywords or terms simultaneously would be highly beneficial. For example, if a library wanted to search cataloging lists using its DSIMS selections, a tool that could cross-reference these selections with cataloging lists would save those involved in collection development and cataloging time searching lists. Several options for searching lists were explored, including AI tools and extensions, Microsoft Power Automate, Power Query (an Excel extension), and Python scripts with PyCharm.

Among these tools, the most successful approach was using ChatGPT to generate Python code for searching cataloging lists based on library item selections and keywords.¹⁰ While the code provided by ChatGPT required a few iterations to refine, it eventually developed into a functional Python script. One of the challenges was ensuring the program performed exact matches for item numbers from FDLP and GPO cataloging lists, as partial

matches would result in errors. For instance, during testing, the script mismatched “0050-E-17” when it was intended to match “0050-E.” After revisions, the script successfully performed exact matches. Additional adjustments included modifying file paths to access Excel files correctly and converting file paths into raw strings (e.g., rpath) to handle backslashes properly.

The final Python script, capable of performing multiple simultaneous searches, was shared on the 2024 DLC conference pages.¹¹ A suggested next step would be to develop a shareable executable version of the program. This version would allow users to load an Excel file and input search criteria for a simple, plug-and-play experience. The executable would output a new Excel file populated with cataloging records that match the library’s query.

The final step for libraries using the tool would involve generating a file of MARC records from the OCLC numbers included in the resulting list of cataloging selections. While this process was not part of the presentation, libraries could extract OCLC numbers from the Python script’s output and create a file for uploading into their cataloging systems. Programs such as OCLC Connexion can assist with this by generating MARC records from a list of OCLC numbers. For guidance, consult OCLC Connexion’s help page: *How do I batch export records from a list of OCLC numbers using Connexion client?*¹²

Cataloging Government Documents in Connexion and WorldShare in a Consortial Cataloging Environment

Another strategy for disseminating government information involves utilizing Connexion and WorldShare subscriptions. For libraries in a shared catalog with access to these tools, there are many workflow and collaboration opportunities to explore. In consortial environments, cooperation between selective and regional libraries is critical for effectively managing records within the shared cataloging environment. With CRDP and MARCIVE no longer viable options, libraries can explore a cataloging model where strengthening collaboration and integrating workflows take on increased importance.

Gathering a list of documents to add to the collection is a major first step in working with a shared catalog. In working closely with other FDLP libraries in the consortium, dividing the workload using each library’s curated list of documents should eliminate duplication of work. Guidance for consortial shared catalogs can be developed by the FDLP regional and selective libraries. The guidance would cover loading, modifying, and any configurations that are needed in the ILS or OCLC for government documents. This strategy, along with the use of AI or other algorithms, is one of several approaches

that can be instrumental in developing an efficient workflow that fits the needs of the library.

Each month, the GPO provides a list of new electronic government documents. This is an excellent resource for curating a list of items relevant to a library and its patrons. As an alternative, it is possible to access the Catalog of U.S. Government Publications (CGP) to create a customized list of documents.¹³ Libraries can also retrieve lists from previous months if they do not subscribe to the emailed list. The CGP website offers excellent tutorials and tips to assist with this process.

OCLC can also aid in gathering documents based on a library’s profile. The OCLC website provides detailed instructions for setting up a government documents collection.¹⁴ This process is straightforward for those with a Cataloging and Metadata Subscription, and additional instructions are available for libraries without a subscription. There are multiple options for obtaining government documents, including OCLC, the CGP, and GitHub.¹⁵ The best approach will depend on each library’s workflows and specific needs.

After obtaining the records or a list of documents to add to the collection, the next step is determining how to upload them. For libraries with an OCLC subscription, records can be uploaded using either Connexion or WorldShare Record Management, with the choice depending on the library’s specific workflow. Workflows may also vary depending on who is responsible for the task. While some prefer batch cataloging for efficiency, others may opt to catalog records individually.

When processing individual records, Connexion and WorldShare Record Management offer multiple search options. Searching by SuDoc number is the most efficient method, and if this has been part of existing workflows, it will remain unchanged. Once the platforms are properly configured, exporting records is a straightforward process. Given that many users have been working with these programs for years, this aspect of the cataloging workflow will not be altered.

Each record management system has strengths and weaknesses. WorldShare Record Management has a cleaner look but also some drawbacks. For example, when exporting from WorldShare some of the information in the MARC 001 and 008 fields is lost, including the date and location of publication. Catalogers will need to add this information back post-export, if they wish to use this method. When exporting from Connexion the MARC 001 and 008 fields information is not lost. However, some may find that editing in Connexion isn’t as user-friendly as in WorldShare. Ultimately, a cataloger’s selection of Connexion and WorldShare is going to be based on personal preferences. Both systems are effective for loading single and batch records. WorldShare is available for free to those with a current OCLC

Cataloging and Metadata Subscription. Information on creating a WorldShare account is available on OCLC's website.¹⁶

For those working in a consortial environment, it is a good practice to check for titles in the shared catalog before exporting records. Frequently, rather than exporting a record, simply making modifications to an existing record is necessary. Many consortia have the same philosophy for shared records: Do No Harm. This philosophy means being careful not to delete metadata or make modifications to records without prior consent of other libraries holding the record. For record clean-up projects, catalogers should first reach out and use established protocols to communicate plans and get approval. A common practice is to contact consortia member libraries if there is a problem with the records (such as improperly added local notes), and allow them to fix the issue, rather than fixing the note without the member library's consent.

A shared catalog simplifies access to records and offers an opportunity for greater collaboration among Federal Depository Libraries within a consortium, reducing redundant work. Partnering with a regional depository library can help distribute the workload more efficiently. While selective libraries with different profiles may have limited overlap, those within the same consortia will still share some common records. If a regional library is part of the shared catalog, even more overlap is likely, further streamlining efforts. With the discontinuation of the CRDP and MARCIVE services, regional libraries may need to rely more on their selective counterparts. Clear communication among libraries will be essential in adapting workflows and ensuring efficiency. Rather than viewing these changes as a setback, libraries can use this shift as an opportunity to strengthen collaboration, enhance cataloging efforts, and foster a robust and productive exchange of ideas within the shared system.

With the discontinuation of CRDP and MARCIVE and rapid change within the cataloging world the next few years are guaranteed to be exciting and challenging. As libraries navigate this, they will need to be flexible and ready to adapt to change and new workflows. A willingness to work collaboratively and share expertise will also be imperative. Fortunately, the FDLP has tools that provide guidance to libraries as they map out new workflows. Several of these resources will help libraries develop lists of items that match the libraries' collection areas.

FDLP Data Manager (FDM) Workflows

The FDLP Data Manager (FDM) offers an efficient solution for managing and uploading MARC records of federal government documents. In response to the GPO's announcement about the discontinuation of the CRDP, FDM emerged as a strong

alternative, allowing libraries to seamlessly continue their work without disruption.

The MARC Records Module within FDM helps librarians retrieve government document records based on a variety of customizable criteria, including catalog record dates, SuDoc number, agency, and publication type. This functionality allows libraries to refine their search and organize records based on specific needs, ensuring that collections remain relevant and streamlined.

FDM's ability to filter and retrieve MARC records tailored to individual library profiles is a key feature that simplifies the cataloging process and supports efficient management of federal documents. Training resources are available in FDLP Academy to help libraries integrate FDM into their workflows.¹⁷ An example of a new FDM workflow system and how to upload records to a library's ILS can be found in the full presentation.¹⁸

One of the critical advantages of FDM is its flexibility and the ability to retrieve records tailored to a library's specific needs. FDM allows libraries to filter records based on various cataloging fields, such as SuDoc number, publication type, and agency, which helps streamline collections and ensure they are relevant to the library's patrons. Another notable benefit is that FDM can retrieve records based on a library's section profile, allowing for even more targeted and efficient record management. Additionally, the system integrates seamlessly with SirsiDynix Symphony, an integrated library system (ILS) that has been shown to work with FDM, enabling smooth uploads of MARC records directly into the library's catalog.

However, FDM does present some challenges. Unlike MARCIVE, FDM does not provide a monthly batch of new and changed records. Additionally, users may encounter issues when attempting to download too many records at once, as integrating FDM MARC records and uploading them into SirsiDynix can sometimes lead to problems with large downloads. While this is a consideration for SirsiDynix users, other integrated library systems (ILS) may have their own unique challenges with large downloads. The specifics of these challenges may vary depending on the system. While the new workflow may require libraries to take on a few additional steps, we feel that FDM remains an excellent resource for many libraries.

Conclusion

The sunseting of the CRDP and the closure of MARCIVE are going to create some challenges for libraries going forward. The potential to collaborate with libraries is wide open and will hopefully create some wonderful new networks. Exploring new technologies will be interesting and can lead to some amazing ways of handling workflows. Instead of looking at this new

world of gathering government documents as a bad thing, we must look at all the wonderful possibilities that it can lead us to. Communication is going to be a significant building block, letting others know what we find and what someone else finds can lead to more sustainable and efficient cataloging workflows. As the saying goes, “Teamwork makes the dream work.” By collaborating across all government documents libraries, we can ensure that everyone has access to the documents they need.

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