CRMS World Online Training: The Decision Tree

Hello - welcome to the CRMS-World Online Training! The following document will help acquaint you with the "decision tree," the main process representation for the CRMS-World review workflow. Here, we'll learn to do the following two things:

1. What is the decision tree, and where can I find it?
2. Understand the workflow and the terms in the tree

Excellent, let's get started!

1.   Understanding What is the decision tree, and where can I find it?

Using the decision tree is essential to making a good review. This is because of the double review process that CRMS-World utilizes. Every record is reviewed by two reviewers; if the reviews match, the record goes into the processing queue and the final determination is recorded, if the reviews do not match, there is a "conflict" and an expert reviewer must adjudicate the conflict in order to send the review to processing. Following the decision tree reduces conflict, as it encourages reviewers to make decisions in the same order.

You should always have a copy of the decision tree handy. Copies can be downloaded from the CRMS-World homepage, and from the University of Michigan Library CRMS-World grant webpage resources section, which is located at http://www.lib.umich.edu/imls-national-leadership-grant-crms-world/presentations-and-resources.

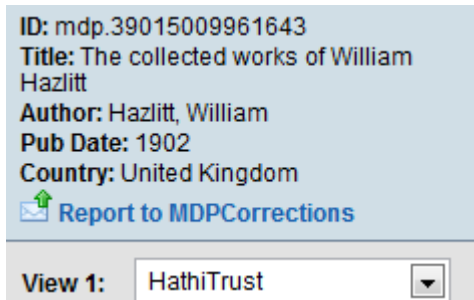**2.   Understanding the workflow and terms**

Take a moment to find a copy of the decision tree and open it. If you don't have access to the internet or a printer, a copy of the tree is appended to the end of this document in Appendix A as well. Please refer to the tree as we go over the workflow and terms.

a. **"CRMS-World record enters queue"-** this is the beginning of the decision tree. This step represents the filtering undertaken before a work enters the CRMS-World queue. There are many millions of books in HathiTrust, and CRMS-World is only looking at a subset of those works. In order to ensure that only relevant works enter the queue, they are filtered by information in their catalog record. For more information on this, see "The CRMS-World Data Flow" located in Appendix B, the CRMS-World homepage, and the resources page linked to above.

b. **"Check catalog record against scan/make sure scan is the same as the record"-** sometimes, although rarely, there is a mismatch between the catalog record and the scan appended to it. Additionally, sometimes there are quality issues with the scans that are so bad that vital elements of the book are missing; things like missing front matter, hands covering important information, etc., are so serious that a review cannot be undertaken. When this is the case, the missing record/bad scan should be reported. There are two different ways to report these

issues. If the issue is with the catalog record, then the "Report to MDP Corrections" link in the upper left of the review interface should be used.

Here's a picture of the link:

ID: mdp.39015009961643
Title: The collected works of William Hazlitt
Author: Hazlitt, William
Pub Date: 1902
Country: United Kingdom
✉ Report to MDPCorrections

View 1: HathiTrust ▾

Click the link and fill out the form. Then mark the work as "und/nfi" with the note "Wrong Record" and a description of the problem. However, unless the record is so dysfunctional as to be completely useless, please try to locate an author death date or publication date as appropriate and append that date to the death date field. If you cannot find a death or publication date, just mark the record as "Wrong Record" and move on.

If the issue is with the quality of the scan itself, then use the "Feedback" link on the top right of the review interface. Here's a picture of the link:

Hi rglushko! Help Feedback
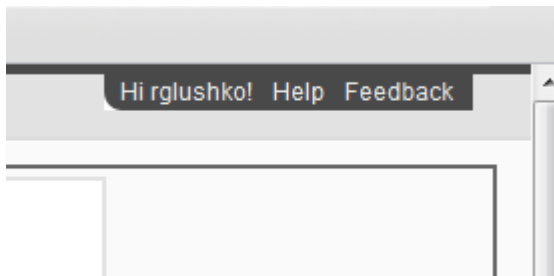
Click the link and fill out the form; please use rcadler@umich.edu as the response email so the Project Manager can keep track of the issue. Then mark the work as "und/nfi" with the note "Missing" and a description of the problem. However, unless the record is so dysfunctional as to be completely useless, please try to locate an author death date or publication date as appropriate and append that date to the death date field. If you cannot find a death or publication date, just mark the record as "Missing" and move on.

If the record matches, proceed to the next step, "Are there inserts?"

c. **"Are there inserts?"-** the next step is to search the front of the work for evidence of "inserts." Inserts are works which may have independent copyright that are "inserted" into a book. Examples of inserts are credited illustrations, credited prefatory matter, or other inserted works like maps, musical scores, multiple independent works listed in the table of contents, etc.

INSTITUTE of MuseumandLibrary SERVICES   M Library   w copyright review management system

Essentially, for the purpose of the CRMS-World grant, it is important to identify any material that does not appear to be copyrighted to the author of the book.

You do not need to search the entire book for inserts; generally inserts will be identifiable in the front matter of the book, such as in the space between the front cover and the table of contents. If you identify inserts, and they are not clearly in the public domain, then mark the work as und/nfi with the reason code "inserts" and provide a brief description of the inserts and their location in the work.

However, even if you mark a work as "und/nfi" because of inserts, please try to record the author death date of publication date as appropriate. This will make any subsequent inquiry into the record much easier, more accurate, and more efficient.

d. **"Is this the first edition?"**- after searching for inserts, you should establish whether this is the first edition of the work. HathiTrust has several editions of many of the books in our collection. For the CRMS-World process we want to establish the original location of authorship; and while non-first editions of a work may be from the same location, in order to be accurate in our determinations, we want to work from the first edition.

If you determine the work to not be the first edition, then mark the work as "und/nfi" with the reason code "Edition." In the notes field describe the edition and the location of the information that led you to the determination.

However, even if you mark a work as "und/nfi" because of edition, please try to record the author death date of publication date as appropriate. This will make any subsequent inquiry into the record much easier, more accurate, and more efficient.

e. **"Search for relevant dates"**- now we begin research in earnest. The first thing to do at this step is to establish the nature of the author. Was the work written by an individual? A government or a corporation? Or is the author anonymous?

If the work was written by an individual, search the recommended bibliographic resources for the author's death date. If there is more than one author, try to record both dates, using the later date as the date in the "Author Death Date" field and putting the earlier date(s) in the notes field. Ideally, you will be able to find the date in two sources to provide corroboration, but if you are unable to do so, don't worry. Once you enter the date, the system will try to suggest a rights code for you; while the system rarely makes mistakes, it's a good idea to refer to the "CRMS-World Reviewer Cheat Sheet" which is available on the CRMS-World homepage and on the resources page linked to above.

If the work was written by a corporation or a government, click the "Publication Date" button and record the publication date of the work. This should be present in both the front matter of

the work and the catalog record. Sometimes it's not clear whether a work was authored by an individual or a corporation or government. When this is the case, record both dates, using your best judgment as to whether the work should be treated as having an individual or government or corporate author. If the work was created by an officer of the Crown, such as a Member of Parliament of an employee of the royal family, use the reason code "Crown Copyright" and make a note of why you came to this determination. Once you enter the date, the system will try to suggest a rights code for you; while the system rarely makes mistakes, it's a good idea to refer to the "CRMS-World Reviewer Cheat Sheet" which is available on the CRMS-World homepage and on the resources page linked to above.

If the author of the work is anonymous, record the publication date of the work and mark the work as "und/nfi" with the reason code "Misc." Record in the notes field that the work was "anon."

f. **"Date found?"**- if a date can be found, try to cross verify the date as mentioned above. If a date cannot be found, then mark the work as "und/nfi" with the reason code "Date." In the notes field list the areas you searched briefly so as to assist in later searching.

g. **"Record Appropriate Determination"**- this step is to remind you to make sure you record the appropriate reason code in the CRMS-World review interface. Consult the "CRMS-World Reviewer Cheat Sheet" to make sure you have put in the right code for the determination.

There you go! Following the decision tree may be complicated at first, but as you do reviews, it will help you work efficiently and accurately. Thank you, and good luck reviewing!

Contacts:

Rick Adler
Project Manager, CRMS-World
rcadler@umich.edu
734-615-1351

Bobby Glushko
Program Manager, CRMS-World
rglushko@umich.edu
732-615-9935