

Draft Notes from Systemwide Cataloging Coordination Committee Meeting

Kapi'olani Community College Library, February 19, 2016

In attendance: Alphie Garcia (UH West O'ahu Library), Carol Kellett (UH Mānoa Library Systems Office), Eileen Yara (Acquisitions liaison), Erica Chang (UH Mānoa Hamilton Cataloging), Irene Mesina (UH Library Council liaison), Jue Wang (Leeward CC Library), Keiko Okuhara (UH Law Library), Luree Ohigashi-Oasay (JABSOM Health Sciences Library), Mariko Kershaw (Windward CC Library), Michelle Sturges (Kapi'olani CC Library), Nadine Leong-Kurio (Honolulu CC Library), Paul Beck (UH Mānoa Hamilton CatSS), Sharon Ouchi (UH Mānoa Hamilton Cataloging)

1) Voyager 9.2

a) Michelle distributed a handout summarizing changes to Cataloging, Authority Control, Acquisitions, Pick and Scan (in both the Circulation and Cataloging clients), and Global Data Change. Please see the accompanying handout for more details. Carol reported that the Voyager 9.2 clients are available at the Systems Office ftp server. If catalogers want to test out new features, they can connect to the Ex Libris Voyager Preview Server. Carol will send the link to the Preview Server out via email.

b) Some enhancements in Voyager 9.2 require decisions on the part of UH catalogers.

i) Sorting tags in MARC records (Cataloging)

In Voy9.2, session preferences in the cataloging client can be set to specify a default MARC tag sort profile to be applied to authority, bibliographic or holdings records.

For this to work, MARC tag sort profiles have to be defined in the Systems Administration client. Two sources of concern were

(1) How to avoid inundating the Systems Office with requests for different tag sort profiles from different libraries

(2) How to protect tag orders that need to be preserved for optimal interaction with other applications, especially WebVoyage (see discussion below under 1.b.v.)

DECISION: SCCC will form an ad hoc committee to examine the impact of various sort order options and suggest a set of tag sort profiles to be used by UH catalogers.

ii) Blocking operators from changing their passwords (All staff clients)

Currently, there is an option in the File pulldown menu of staff clients that gives an operator the option to change their password. In Voy9.2 an operator's account can be set so that this option is not available.

DECISION: The shared, read-only "catread" account will be set so that users cannot change the password.

iii) Enhanced mapping for item information in bulk import (System Administration)

In Voy9.2, additional fields have been added to the bulk import profile allowing mapping of more item and holdings data such as price, copy number, and number of pieces. The release notes say that after the upgrade, existing bulk import profiles should be reviewed and adjusted as necessary.

DECISION: The Systems Office will take responsibility for adjusting profiles by contacting bulk import users to discuss possible modifications.

iv) Security for overlaying existing bibliographic records (Cataloging)

A new security option has been added in Voy9.2 to control who can overlay or merge existing bibliographic records.

DECISION: The set of operator profiles in System Administration will be expanded so that the ability to overlay bib records can be assigned as needed. Libraries using bib overlay have to send Michelle the cataloging operator profiles that need to have bib overlay capability. All other cataloging operator profiles will be edited so that bib overlay is not available to operators with those profiles.

v) Display RDA data in search results (WebVoyage and staff clients)

In Voy9.2, search result displays that include title information can be configured to also include content type, media type, and carrier type information. For this to work, the record must contain "rda" in an 040 subfield e, and RDA information (tags 336, 337, 338). The search results can be configured to display the text or the RDA code, or both. If the RDA tag is repeated, only the first value will be displayed.

In System Administration, each search configuration has to be edited separately to include RDA data in the search results. If RDA data is included in a particular search

configuration, it affects both staff searches and WebVoyage searches. Sources of concern were:

- (1) For bib records with repeated RDA tags, how can tag order be preserved to make sure the most relevant data displays and also to make sure that matching data displays? How would implementation of the tag sort order profiles affect the ability to preserve desired RDA tag order (see discussion above under 1.b.i.)?
- (2) There are very few pure RDA records in the database. Many are not RDA, some are not RDA but have 336, 337, 338 tags. With so few pure RDA records, would configuring searches to include RDA data be useful?
- (3) At this point, RDA data is not displayed at all in WebVoyage, (other than Staff View). Would it make sense for it to appear in the search results if it doesn't appear anywhere else?

DECISION: The catalogers will discuss the option to display RDA data in search results further before approaching the WebVoyage Committee about a joint decision.

2) Cataloging Operator Profile Names

The Systems Office maintains a page where libraries can go to place requests for Voyager operator accounts (<http://assist.hawaii.edu/loginrequest/>). The page lists available operator profiles in cataloging, circulation and acquisitions that sites can request. While the names of circulation and acquisitions profiles include a description of their function, the list of cataloging profiles does not. Catalogers asked if the list could be edited to give an idea of what an operator can do under different cataloging profiles. Michelle will work with Carol to come up with something. Since the basic cataloging activities are Add, Edit, Delete and the basic records are Bib, Holdings, Item and Authority, Michelle proposed using initial letters to describe functions. For example, Bib edit + Holdings add, edit, delete, + Item add, edit, delete + no authority might be listed as Bib-E, Hold-AED, Item-AED. Carol Kellett downloaded a spreadsheet listing the current cataloging operator profiles for each site and sent it out via the SCCC email list.

3) Bib records for e-resources acquired as monographs

Catalogers discussed how best to catalog electronic resources that are acquired as monographs. The policy for tangible items acquired as monographs (e.g. books, kits, compact discs) is to avoid adding records for an item if there is already a record in the

database. Instead, catalogers should link their holdings to the existing bib record. However, at the May 2015 SCCC meeting, the committee agreed that in the case of bulk-loaded subscription e-resource packages, records should be added separately by each owning library, whether or not there is already a record for the e-resource in the catalog database.

DECISION: The committee decided that records for all e-resources should be handled in the same way. For all e-resources, records should be added separately by each owning library, whether or not there is already a record for the e-resource in the catalog database.

4) **949/971 tags in e-resource bib records**

Carol explained that to help manage bib records that get imported as part of large subscription e-resource packages, she includes combinations of 949/971 tags to the bibs with information indicating what package the records belong to. The 949 tag is used to build holdings records during bulk import and includes the name of the location appearing in the holdings record. The 971 tag is a locally-defined tag used for information on how an item was acquired. It has the same structure as the MARC 541 field (Immediate Source of Acquisition Note) and is indexed in Voyager. The 971 index appears in the cataloging left-anchored search list as “Donor local (971)”.

- a) Catalogers who manually add some of the bib records for items in an e-resource package need to remember to include the 949/971 tags with the information used to identify that e-resource package.
- b) Catalogers should not delete 949 tags from any e-resource record.
- c) Catalogers should not delete 971 tags from any bib record (unless the 971 tag belongs to their library and does not refer to an e-resource package).

5) **Other electronic resource issues**

a) Ebscohost Public Library records

Alphie reported that he and Carol had loaded records for the Ebscohost Public Library e-book collection with links via the UH shared proxy server. The collection is a consortial purchase through the Hawaii Library Consortium. Any UH library can provide their users with access to the collection by adding the location code (AEBSCO) to their location limit group.

b) Public notes in WebVoyage

Carol reported that the WebVoyage Committee had been working on developing simple, standard language for the public notes that appear in holdings records for electronic resources (e.g. UH System Full Text, Kapiolani CC Streaming Video). However, it turns out that some vendors require a statement specifying exactly who has access to an e-resource (e.g. Access to full text for all UH faculty, students, and staff). Carol advised catalogers to check their e-resource licensing agreements for such requirements.

c) Access to e-resources for patrons when a login is required

Carol reported that there can occasionally be a lag for patrons, (usually those who are added to the Voyager database manually at an Access Services desk), between when they have access to services like checking out materials or placing online holds and renewals and when they can access e-resources via links in WebVoyage (when a login is required). The lag is due to the fact that Voyager updates its patron info immediately someone is added, but the proxy server extracts of patron updates are hourly. There can therefore be a delay of a few hours for access to e-resources when a login is required.

d) Locating hybrid e-resource records

Erica reported that UH Hamilton is looking at a project to identify hybrid records in which items with the same content but in different formats are linked to a single bibliographic record. They are considering a project to convert the hybrids into separate records, one for each format. The most pressing combination would be print and electronic versions of an item linked to the same bib, but they also know there are a lot of instances of other combinations such as print and microform. Carol said Systems can run a report to generate a list of hybrids, but they need parameters to look for. Michelle suggested starting with Hamilton locations that have a smaller number of items and running reports to see which bibs with holdings at these locations also have holdings at Hamilton's e-resource location (OuzZ). Carol said Systems would take a look at that approach.

6) **Standards for minimal-level RDA catalog records**

Michelle Sturges distributed a document from Michael Chohey of UH Hamilton Cataloging with suggested standards for minimal-level RDA and non-RDA bibliographic records. The standards for non-RDA records were identical to those at the SCCC website, (<http://www.hawaii.edu/sccc/bibstd.html#minstds>) with the exception that 245 \$h (Medium) had a caveat noting that it will no longer be used after March 31, 2016.

The standards for RDA records included all of the elements of non-RDA records with the exception of 245 \$h (Medium) and 260 \$b (Publisher) and \$c (Date of publication, distribution, etc.). The standards for RDA records also included 040 \$b eng and 040 \$e rda; 264 \$b (Publisher) and \$c (Date of Publication, Distribution, etc.); 336 \$a (Content type) and \$2 rdacontent; 337 \$a (Media type) and \$2 rdamedia; and 338 \$a (Carrier type) and \$2 rdacarrier.

At the meeting, the committee agreed to all of the proposed changes. In addition, the committee decided to add 264 \$a (Place of publication) and 1XX \$a (Creator). The discussion about authority control was edited to include use of the 1XX tag in minimal bib records. (See handout for the final standards.)

7) Deduping Windward CC Library holdings

Mariko reported that sometime back she had given UH Cataloging permission to relink WCC holdings to keepx bib records during deduping without checking with her first. She said she would like to extend that permission to all UH catalogers. If a cataloger is deduping a set of bib records, and one of the duplicate records has a Windward CC holdings record linked to it, it is okay to relink the Windward CC holdings to the keepx bib without contacting Mariko.

8) How to report MARC data elements not displaying in Voyager

Michelle asked what the procedure is for reporting when a MARC data element is not displaying in WebVoyage. The answer was that the issue should be reported to Carol Kellett, who will relay the report to the WebVoyage Committee for discussion.

9) 520 subfield c and 020 subfield q not displaying in WebVoyage

Catalogers noted two situations in which information that used to display in WebVoyage no longer displayed because MARC revisions had moved the data into new subfields: 520 subfield c (source of information in subfield a (e.g. From publisher description)) and 020 subfield q (qualifying Information about an ISBN (e.g. paperback, volume 1)). Carol made revisions in WebVoyage so that the data in the new subfields would display.

10) sccc-l email discussion list

At the November 2015 meeting, the committee voted unanimously to allow guests at SCCC meetings and to allow non-committee members to subscribe to sccc-l. However, there have not been many requests to be added to the discussion list. Members suggested Michelle send an invitation out using the sites-l email announcement list.

11) Library updates

a) Group subscription to RDA Toolkit

Michelle reported that she had yet to hear back from ALA about separate billing for the UH libraries group subscription to RDA Toolkit. The last word she received was that the billing department was short-staffed.

b) UH Law

Keiko reported that they have filled an APT vacancy for the evening supervisor's position.

c) UH West Oahu

Alphie reported he was thinking of developing a tutorial on the procedures he uses for batch record management. Members expressed interest in learning about his procedures.

d) Honolulu CC

Irene reported that thanks to a grant that Nadine worked on, the library received \$32,000 which was used to purchase new computers for instruction and new furniture. Nadine reported that the library has been hosting 1-2 presentations a month featuring speakers from the campus. Topics have included comic books, time management, and different perspectives on Valentine's Day. The library set up a "make your own valentine" makerspace to go with the Valentine's Day presentation. Nadine also thanked members for sharing how they checked in serials.

e) UH Hamilton Acquisitions

Eileen reported that UH Hamilton Acquisitions is essaying a streaming video rental program. Videos are made available for a semester at a time or a year at a time. When a patron uses a video, the library pays for that use. They have also started a music score approval plan. In response to changes in reporting requirements, they will have to change inventory standards to ignore transient items like e-books that are part of subscription packages. Eileen also reported that UH Serials is converting hybrid serial records (print and electronic on one bib) into separate bibs for each format.

f) UH Hamilton Cataloging

i) CJK retrospective conversion

Erica and Sharon reported that CJK retrospective conversion was never completed. Some shelflists were lost in the 2004 flood, so there are many items on the shelves without any records in the database. They will need to do an inventory check to solve the issue.

ii) Vacancies

The process to hire a new Hawaiian Materials Cataloging/Metadata Librarian was almost completed when the candidate withdrew, so the process has to start over. The library has a vacancy prioritization system, but since this position was already approved, the position ad will be posted without going through the prioritization system. The Cataloging Department submitted a proposal for two positions through the prioritization system: a cataloging librarian who would do general monograph cataloging and a metadata librarian.

iii) Future directions and strategic planning

Irene Herold wrote a white paper about the library's direction. Everyone was asked to read the paper and then meet to discuss. Themes included space, technology, kuleana, and global partners. The next step will be to have strategic planning based on ideas that come up in the white paper discussions.

iv) Special research collection

The library is trying to decide what to do with a number of odd collections in the Phase 3 basement that were acquired over the years but never added. There are archives, art works, architectural models, items in big formats that are hard to move, items relating to Jean Charlot, other stuff that needs to be curated. All are unprocessed and the library doesn't know where to assign the work. The two leading proposed scenarios are creating a separate department or adding positions to the Hawaii Pacific and Archives departments to handle the work. There is also a possibility that the work may come to Cataloging.

v) Nancy Sack will be back next month from sabbatical.

g) Windward CC

Mariko reported that there have been a number of staffing changes: they have a new circulation manager and their casual hire APT access services manager is becoming permanent. They are still waiting for word on the new head librarian. Mariko has her first

LIS intern who will be learning reference and preservation. Mariko did some cataloging clean up and cleared out all of her WCC dedup notes. She is also taking HAWN 102 and finds it is helping her catalog Hawaiian language materials.

h) JABSOM

Luree reported that they are short-staffed due to a vacant instructional librarian position which they are trying to fill and one APT who is out on maternity leave. Luree cataloged the Clinical Key collection using OCLC Collection Manager and thinks she will probably automate other e-book collections using the same method. Her only caveat is that with OCLC you might not get 100% coverage if there is no record for a title in the OCLC database.

i) UH Hamilton CatSS

Paul reported they are working through the Sinclair streaming videos to standardize the cataloging and the wording in the holdings records. The department is a little short-staffed at this time. They have started e-book cataloging for permanent titles.

j) Kapiolani CC

Michelle reported that they had hired a new acquisitions assistant. The second floor will be undergoing a renovation as part of a Title III grant. The library will be Hawaii's site for the Folger Library Shakespeare First Folio tour from April 25-May 25.