Cataloging Work Group Meeting

Notes

April 22, 2020

Meeting recording:

Attendees: Unjoo Lee, Cheryl Cruse, Patt Kopp, Jessica Herrerra, Michael Habata, Monica Doman, Amy Carbonaro, Amy Beadle, Jessica Hartswigen, Becka Cooling, Glorian Sipman, Joel Webb, Jonathan Lee, Tim Ream

Call to order: 3:06 p.m.

1. Update from the LSP Governance Committee Meeting:

Monica presented to the Governance Committee the updated document: *Suppression of Records*. The Best Practices wiki has been updated and is current: meeting recordings, meeting notes, and documents. Two of the discussion topics at the meeting were a reminder for libraries to close out old salesforce cases at Ex Libris support and the transition from the Primo Central Index to the Central Discovery Index.

Amy Beadle said salesforce tickets have a 60 day window for which they case remains open, waiting for librarians to close the ticket. Workgroup appointments were extended into a second year. Most of the members of this group are coming to the end of our service on the committee. One or two members from this group will be able to continue to serve with new committee members in order to pass on accumulated knowledge.

The Chancellor reported at today's Town Hall meeting that he supports continued funding of the LSP Project but the revised Governor's budget is released the 14th of May. The CCL Town Hall is this Friday, April 24.

Becka expressed concern that the same members are not continuing to serve on the cataloging committee since the knowledge the group has gained is so esoteric and specific to catalogers. Amy Beadle explained that the Academic Senate approves faculty membership on committees. Classified staff are not held to the same restrictions for service. Hopefully some of the current members will be able to serve another term on the committee.

2. Jessica Hartswigen's Update:

The reclamation project is in progress. Currently the pilot libraries have been sent scan and delete files. This is OCLC's Information on this process:

"You send all of your library's records. As they are matched in WorldCat and holdings are set for items you hold, the current date is "stamped" on each record.

After data sync processing is complete, OCLC runs a Scan/Delete to remove your holdings from records with a date stamp earlier than the date of the data sync processing transaction (typically the date when you extracted your records for submittal to OCLC)."

Jessica is working on instructions for what librarians are supposed to do with these files. Holdings that are in OCLC will not be retained if there is a different match in WorldCat for these records.

Jessica is working on a post-reclamation document. Amy B. requested the instructions for the scan/delete file work since there is confusion about what it all means and Pat agreed.

Becka asked if Jessica is working with OCLC on the project to refresh records in NZ. Jessica said yes but libraries need to update the records in Connexion when they import records into the NZ. Becka asked about the issue of records without OCLC #s in NZ. Jessica said she needs to run a Query Collection first.

Patt asked if a record got merged in OCLC does that remove the record if the original OCLC # is no longer there. Becka said there is a string of old OCLC numbers for records that have undergone changes: merging with others. The 019 has the old numbers. The new numbers should be in the 035.

Jessica said she is working on instructions on how to get the latest OCN/OCLC number into NZ.

Becka asked if we should turn on data sync now if the library is not participating in reclamation project. Jessica said yes.

Jessica said you are syncing up with OCLC and the item comes down to NZ.

3. **Other Items – Bound-withs Documents**

Group moved to discussion of the documents to be discussed at the meeting: Bound-withs.

Policy: Bound-withs

The cataloging group does not know of any CCC library that has bound-withs so this policy is being considered. "There is only one method for creating new records for bound-withs in Alma that will work under the OCLC master record approach adopted by the CCC libraries.

Vote to accept policy: Yes – 13/ Abstain – 1 Cooling

Monica said she relied on the CSU documents for help.

Procedure: Bound-withs: Creating a Host Bibliographic Record

"Create a host bibliographic record in the Institution Zone in Alma". The only question was in step 4 where need to investigate how to create the template for a bound-with. Patt asked if these documents will be edited whenever Alma changes procedures. Monica said yes these documents will be reviewed annually. Vote to accept the procedure: Yes – 14

Procedure: Create a Set of All Bound-with Records

"Bound-with records include host bibliographic records and all their respective constituent records." No concerns or questions were asked about this document. Vote to accept this procedure: Yes – 14

Procedure: Fixing Broken Bound-with Links in Migrated Records

"This procedure can be followed after completing the procedure Create a Set of All Bound-with Records."

This was adapted from the CSU wiki. Vote to approve procedure: Yes – 14

Policy: Host Bibliographic Record Suppression

"In accordance with the policy for Bound-withs, host bibliographic records should be suppressed in Alma so that they don't result in a confusing display in Primo VE."

Monica said she obtained the images she could for this document. Cheryl pointed out that she is unable to Suppress Bibs from Discovery as indicated in the instructions. She tried to suppress lost items in her catalog and the Bib itself still appears in a Primo search, although the item is noted as being unavailable. She entered a support ticket at ExL for this problem and they said this is a "known issue" and they are going to respond to the problem when they determine how it is solved. Vote to approve this policy: Yes – 14

Monica reports that the cataloging work group managed to review all of the documents under its purview.

Other Items:

Amy C. said there is a need for experts in the field for the UX and UI groups. "Super Users" are needed now that libraries are live on Alma/Primo. If we know of a person who fits this description, please give their name to Amy. Since the current cataloging work group members cannot serve on cataloging work group at the end of their terms they may want to join the expert user group.

Next meeting: May

Adjourn: 3:43