

Cataloging Work Group

Meeting Notes

January 22, 2020

Meeting recording: (*recording began at 3:08*)

Attendees: Becka Cooling, Jessica Hartswigen, Patricia Burson, Mary Wahl, Melissa Taylor, Betty Rivera, Deb Ondricka, Amy Beadle, Glorian Sipman, Patricia Kopp, Cheryl Cruse, Monica Doman

Jessica reported that she has been in contact with OCLC and has been collecting information to set up configurations, policies, and procedures for work with OCLC and will share what she obtains. The daily loads to OCLC will happen after she completes that work. ExL warns that data will be in disarray until reclamation can be completed. She will find out from OCLC what can be done about records without OCLC numbers.

Becka asked about records without OCLC numbers becoming the default in the NZ, such as LA CCD's. Records can't be imported so already there are problems.

Discussion of questions from basecamp discussions and policies sent to cataloging workgroup – Part 1:

Question: shouldn't all work in NZ be done by NZ manager? Yes, Jessica will work on all NZ tasks unless an NZ management group is formed. Becka asks, is the ability to make changes in NZ locked down? Jessica said yes she can restrict ability for others to do anything in NZ.

#1 Deleting Network Zone Records without an Inventory from an IZ (Policy)

<https://docs.google.com/document/d/1k6lwEGs3xVdBksBEHkrFyDc-iuegEQ--tQfiNnN5VF8/edit?usp=sharing>

Only NZ manager will be able to delete records without inventory in NZ. Becka commented that roles for catalogers is confusing as to what you can and cannot do. The "cataloger extended role" is the only role that can delete NZ records. Mary would like to be able to delete records that need deleting from NZ. Jessica would like to review and test restrictions on roles and NZ practices first. It's important to block the ability for people to delete NZ records. The work group will be sure to publicize this policy.

#2 Deleting Network Zone Records without an Inventory from an IZ (Best Practice)

<https://docs.google.com/document/d/1Dh0GkAkWgUxXc3yBOrWo5Vz76x55u1Xtx1KC-pa9rIE/edit?usp=sharing>

Only policies will go out to the field. All policies will be reviewed by the Governance Committee first. Procedures can be distributed without review of committee. Document #2 was of highest priority by group.

#3 Deleting Import Profiles/Normalization Rules Naming Conventions (Policy)

https://docs.google.com/document/d/1RkdXU2106KviwE0b_npX6JEHYgsw24GE7gJTWrWDf8Y/edit?usp=sharing

No comments were made re: #3 above. Becka said screen shots cannot be added at this time. Jessica will add screen shots.

#4 Network Zone Normalization (Policy) **we need to replace the screenshots, feel free to go for it and update these if you have them handy**

https://docs.google.com/document/d/11foyljU9YEDU7c5kUPrlGRpDAM_0lnJvh3PdYjCT_D8/edit?usp=sharing

Monica shared screen shots for these instructions. Becka asked if this is how to import records and edit records? Jessica said yes. These came from Orbis Cascade. Becka suggested everyone test these. Monica said we should test before sending out to all.

#5 OCLC Connexion - Alma Export Integration for Network Zone **we need to replace the screenshots, feel free to go for it and update these if you have them handy**

https://docs.google.com/document/d/18Rcrv5lkSvM0aK4XZ9InsioY8_yORACzeS61V6cbOZk/edit?usp=sharing

Mary asked via Basecamp:

I've set up our Connexion with Alma at my library and I'm actually already able to export a record into the NZ. So does this policy mean (in my case for instance) that my library would need to switch to the NZ level integration profile? So that we're using the proper match and merge methods?

Jessica answers yes. Mary asks so I switch to integrated profile at NZ level? Jessica says yes.

Becka reported matching problems with this and all needs testing.

Jessica will ask about records missing OCLC numbers.

Documents reviewed by Cataloging Workgroup Part 2:

#6 WorldCat (OCLC) Search External Resources for Network Zone Configuration (Policy)

https://docs.google.com/document/d/1ppBCAKuCz7RnAnYDc0a7fy1j578slGNXtTOK_QTBQg4/edit?usp=sharing

Do we use a shared NZ search? Jessica said we don't need to redo the search external resources configuration. This is for the NZ set-up. Patricia asks, are we importing from OCLC/Connexion? Yes you can do either, Jessica.

#7 Primary Bibliographic Utility (Policy)

<https://docs.google.com/document/d/1QB7Uoh9SD3Lfqu7wEy0UVYht9Xl43MosKKh884qXvVI/edit?usp=sharing>

Document #7 is important. This discusses OCLC # as match point. Someone pointed out these topics may have been addressed elsewhere in policies. Becka asked about brief bib records in NZ. They shouldn't be in NZ should they? This policy sounds like these types of records would be in NZ. *(Cheryl didn't think this was answered in conversation. These should only be in IZ, right?)*

Mary asks, will this go out to list for vetting? Yes, it's a policy.

#8 Recommended Merge Methods (Policy)

https://docs.google.com/document/d/13N2D9jVksISvqEq_VzTPxJ6_CW1YrNxdh2z7tH8hf6M/edit?usp=sharing

Someone went to OCLC during meeting to demonstrate this setup. The password will be shared by Jessica.

#9 Recommended Match Methods (Policy)

<https://docs.google.com/document/d/1XZfa8LKZn7T86xIHC4UdjUfrVfHqnXtktglA91Z9PPw/edit?usp=sharing>

Everyone reported this all good.

#10 Management Tags (Policy)

<https://docs.google.com/document/d/1GF5gtLkjU5gnFW4ma4tKrzLa36s8nFq5OtmZqyjNFBM/edit?usp=sharing>

This document needs to go to the Discovery Group. Don't suppress publishing from Primo. If it's in NZ don't suppress. Pat asks, can we suppress if we're still working on the record? We need some way to suppress those. Mary says let's see what Discovery group says. May have to change the labels. There's larger implications for this. We need to tell people not to suppress bib records in the NZ because there are larger implications for this.

#11 Merge Rules

This doesn't have to be agreed upon. Someone asks, what does OCA stand for? Orbis Cascade Alliance. We need to re-label it for CCCL.

Comments from Basecamp:

As Becka said for another set of policies – is it expected that we test this out before sending this out? This one makes sense as I read it (it looks like it says to basically overlay everything but the OCLC #), but I haven't tested it or anything (and I'm not sure if I'm even able to). Also, just curious – what does OCA stand for?

12. Overlaying Bibliographic Records in Alma (Policy)

Only comments: "Sounds ok to me." by Mary.

13. Overlaying Bibliographic Records in Alma NZ: Procedures

In section 1) / 1A) the first sentence is phrased a bit awkwardly. Also, when it says "Overlay takes place automatically" does that mean by the nightly sync job? Other than that, it all makes sense to me.

Answer: the nightly sync job or overlay takes place automatically.

Becka asks: does some of this overlap with the Acquisitions group?

Jessica: we should have them take a look at this policy too. Acquisitions might be looking for the best record at beginning of their workflow.

Monica: We've been in contact with them and will share this document with them.

14. Retaining and Deleting MARC Fields in OCLC Records (Policy)

Mary: Sounds good to me.

Someone commented: For discovery – cataloger or librarian working in discovery area of Alma/Primo needs to learn how to suppress fields not needed.

15. Deleting MARC Fields in OCLC Records - This was a duplication of document #14.

Comment in basecamp: I think this one is a duplicate of #14? - Yes

16. Alma Daily OCLC Bib Record Updates and OCLC WorldShare Collection Manager (Procedures)

<https://docs.google.com/document/d/1KCs-twgG7qNNSf8HHJ3cq9iMu2HIWs7hi2RZ4mDZyXA/edit?usp=sharing>

Screen shots are needed for this document. Much of the tasks in this document will be work for Jessica to complete. Jessica is not sure when all of this will take effect. She is waiting for OCLC's input on some of these issues. Question: which records will be updated? New and edited records are updated each day. Is there a performance drain on NZ? No. A fraction of the NZ records are updated each night. What about records with no 035? Jessica said there is a way to get them into the NZ but the records have to have holdings. This is something to consider for the reclamation project. Jessica is going to ask OCLC about this before they "flip the switch". THE REST OF THE DOCUMENTS BELOW WILL BE SHARED AT THE NEXT MEETING.

17. Publishing to OCLC

<https://docs.google.com/document/d/1shNzmySibu7qg26WqVqHDXlzgaeKF6h9uUEEzFfzCRk/edit?usp=sharing>

18. Suppression of Records for Physical Inventory (Policy)

<https://docs.google.com/document/d/1sC-MdPP7QiBaUJc5m3lvDYEk5qgUG1neTxGVns7eCpE/edit?usp=sharing>

19. Suppression of Records (Procedures)

https://docs.google.com/document/d/1UuGVrZl2pSrw-LFObDQqbkQhiX2VWB1QpXoYxufu2_4/edit?usp=sharing

20. Deleting MARC Fields in OCLC Records (Procedures)

https://docs.google.com/document/d/1zOUIjG9VxvNXII_1aLvlx8xMKt1KQCftn1ij9rxyDZY/edit?usp=sharing

Basecamp is going away. We need to move to a Google group. Jessica will update us about her work in the NZ. Jessica plans to attend all future meetings.

Adjourned: 4:11 pm