Cataloging Workgroup

Meeting Notes

May 27, 2020

Meeting recording:

Attendees: Monica Doman, Unjoo Lee, Cheryl Cruse, Mary Wahl, Patt Kopp, Jessica Hartswigen, Becka Cooling, Amy Carbonaro, Shannon Hammock

Documents discussed at this meeting:

[Import Profiles for Loading Brief Order Records and WCP into NZ](#)

[In-Process Brief Bib Records & Minimum Acquisitions Data](#)
[Single vs. Separate Records - Policy](#)
[Cataloging E-Book Packages and Single Titles (GOBI API and GOBI EOCR)](#)

Call to order: 3:01 p.m.

LSP Governance Committee Update:

At the next LSP GC meeting on June 5, 2020 the most recently discussed policies from the cataloging workgroup will be presented. This includes the document on boundwiths. The continued funding of the LSP is in question. There is still hope but "system wide support" of all members is called for. We need paid staff, such as Amy and Amy and Jessica. There is too much work to be done to rely on volunteers.

LSP CC webinar:

The LSP webinar in which the cataloging workgroup presented its work over the past 2 years was held. Mary Wahl and Glorian Sipman did a good job! Phase 2 of the LSP workgroup begins with the next academic year. The goal for the cataloging workgroup is to refine the best practices. There is a new section of the wiki for shared documents from libraries which include tips and tricks. There was a webinar on the OCLC Reclamation project. Amy said there is still a need for "experts" in all areas of the LSP. If you are interested in serving on another LSP workgroup please fill out the form available for this. Classified staff can continue to serve but librarians as faculty are restricted by Academic Senate to 2-year terms. The next cataloging workgroup meeting in June has been cancelled. This is Monica's last meeting! We're all sad to see her go and we thank her for all the work she has done.

Question from CCSF librarians:

The librarians from the San Francisco Library had a question about e-videos in the Network Zone. They want to ensure streaming video catalog records are consistent. The generic record for a streaming video should be in the NZ and each library who owns the title should be creating a portfolio and linking their holdings to that master record. The note or question from SF librarians came from a document on the cataloging wiki but it is unknown which one they were referring to in their question. It is possibly from the information in the provider neutral document but it was felt that there was some misunderstanding regarding a policy the SF librarian found. It was felt some questions now being presented may be more appropriate for the ERM group to address. When a record for an electronic resource is found in CZ it should be a provider neutral record. Libraries should use the e-resource record in NZ and add as a portfolio with their library's URL and linking to the NZ record. The cataloging workgroup needs to create a policy for electronic videos.

It was asked whether libraries should keep holdings on e-books in OCLC. It was asked why we would want to link holdings ebook records to CZ? Jessica said because CZ is where electronic resources are managed. Becka said that records for electronic resources, ebooks, are better from OCLC than the records found in the CZ. Jessica said the cataloging workgroup should write up a recommendation regarding management of e-books. Maybe it would be enough to tell libraries they can handle them how they choose. Cheryl added that it would be helpful if the two different options and their ramifications for managing them this way was given; retrieving from OCLC and importing into NZ/IZ, or obtaining records from CZ. An e-resources expert to assist with this is needed.

ERM/Acquisitions policy discussion:

Single vs. Separate Records

This document was reviewed and group said it looked OK.

Monica said she will add this note to the document.

Cataloging E-Book Packages and Single Titles (GOBI API and GOBI EOCR)
Becka asked if the workflow in this document is different from our workflow? Yes. Monica said we need to indicate this because others will have the same question. Becka asked if the ERM group will come out with a policy for people who do not use Gobi? Monica said she will add that question as well.

Guidance is also needed on e-book package management. Packages from vendors such as e-Book Central are not consortium managed. Jessica said management depends on whether you subscribe to the whole package or just certain titles. You can

set management of these in NZ if lots of libraries are subscribing. Monica said she will pass these questions on to the ERM group to ask them.

Next document reviewed: *Using Provider Neutral Records for Databases.* No comments were made on this document by group members. OK

In-Process Brief Bib Records & Minimum Acquisitions Data

Jessica asked that if the library is ordering a title that no one else has should it really be added to the NZ? It was thought no. But someone pointed out that record would be overlayed with OCLC full record. Becka said libraries should be cataloging in OCLC. Why it was asked would vendor record orders be put in NZ? Jessica said that CSU's do have these records in their NZ. Monica said she will post these questions to ERM group.

Import Profiles for Loading Brief Order Records and WCP into NZ

Becka's comments to group via email on May 20, 2020:

"on page 5:

Process Options:

> *1.   Single-phase import process with one import profile, matching on ISxN/024/035 (i.e. ISBN or ISSN or 024 or 035) with automatic or manual handling.*

To me, it doesn't look like **ISxN/024/035 (i.e. ISBN or ISSN or 024 or 035)** is an option? Or does this mean either **ISBN/024/035** or **ISSN/024/035**?

I ask because we recently had an issue with a Match Method -- in this ExL doc Managing Import Profiles, a Match Method is listed that was not actually an option to select in Alma. It was fixed with the May release, and is now an option. It is the **ISBN (exact subfield match)/ 024 / 035 Match Method:**

We use that for our non-serial Match Method in our import profiles for vendors now because the **ISBN/024/035 Match Method** was matching a print record to an ebook record in the NZ. Catalogers sometimes use the $z in the 020 to record the ebook ISBN. From Bib Formats & Standards:

We found that the Match Method needs to distinguish between the subfield $a and subfield $z in the ISBN to find the correct record.

OCLC Refresh – Jessica said that the week of June 8 the NZ refresh should be set up.

Monica says thank you to everyone..."We did amazing things!"
Adjourn: 3:58