**(DRAFT) URSUS CATALOGING STANDARDS COMMITTEE MEETING**

**September 18, 2015**

**UMA-Bangor**

**Minutes**

Present (16): Cason Snow (chair, UM), Jim Roy (MSL), Mary Saunders (MSL), Alex Burnett (LLRL), Ryan Jones (LLRL), Sharon Quinn Fitzgerald (UM), Elizabeth Phipps (USM), Bryce Cundick (UMF), Alisia Revitt (MIN), Lynn Ullman (MIN), Albie Dunn (MIN), Nelson Eubanks (MIN), Patrick Layne (BPL), Roger Getz (UMPI), Michelle Greene (UMPI), Jess Isler (UMA, note-taker)

Polycom: Ben Noeske (UMM) and Asita Albert (UMFK)

**856 field inclusion in print records (Alex)**

* Extensive discussion about user needs and best practices, and what the possibilities will be going forward in terms of maintenance for “hybrid” print/electronic records
* To some extent use patterns depend on the institution and users: for some users it is easier to locate digital copies if they are linked in print-specific records, but some users are accustomed to using the electronic resources scope limit (which would mean they would not find the hybrid records)
* Past practice has been to use separate records for separate formats, but there are already some hybrid records in the system (perhaps a clean-up project is in order)
* When possible, we try to have electronic separate from print, because as we move towards having master records with different entities by genre it will be helpful, and as we move towards future ILS products/upgraded systems, it will be helpful
* Important to have separate records as we move towards batch serials records loads
* Creating hybrid records would create a need for future maintenance when we move to a new catalog
* Should we update our policy document to outline both policy and specific exceptions?
	+ E.g., OCLC takes a middle of the road approach saying best practice is to use separate records, but local practices may vary
	+ E.g., GPO historically had advocated for single record approach, but did switch back, their policy now is to use separate records
* If we change expectations and create a division of practices, it will become more confusing to the user and possibly burden the public-facing library staff
* Can the resource icons help with distinguishing types of items? May be confusing or limiting in terms of depth
* From a MIN perspective: separate records are easier for batch loading, etc. especially re: overlay dangers
* Compromise proposed, e.g., Adding links into item records instead of in the bib
* It would display in the item record information, and would prevent overlay issues for bib records, but would not provide a scoping opportunity for electronic resources
* Cason will draft policy language and share with the committee, and add examples of what exceptions are appropriate, and so we are cognizant of the future impact
* Exceptions should be documented so they may be shared with public services staff who may need to explain them to users

**Brainstorming about how to handle loaded records for ejournals (Ben)**

* When ejournal bib records are loaded from a vendor, e.g., Serials Solutions, the bib records are loaded “clean” without any attached item or other records. The bib record branch list includes all locations that may access the journal. If an institution adds an order or item record to the ejournal bib, the overnight updates process removes all other branches from the records
* 2 options available:
	+ Create a duplicate/dummy bib record, suppress it, and attach order & item records
	+ Return to the past practice of loading item records with ejournal bib records loads (requiring each institution to suppress item records periodically)
* Examples of turning off the overnight reconciliation, we would have to make sure we remove the branch when we remove items
* Maintenance issues for suppressing these item records in the past, but can we police the removal of item records better if we go back to adding the item records? Some institutions are time challenged as is
* Ejournals records come and go frequently from Serials solutions: Databases seem to drop and add journal titles frequently, and adding item records will slow down the SS loads process significantly
* The consequences of not suppressing item records for batch loaded records only apply to institutions that do not suppress those item records, whereas the current issue affects all locations that share access to the title (and lose access)
* Sharon to assess the impact on Orono, but the duplicate/dummy scenario would be onerous and will impact multiple departments: Acquisitions, Cataloging, and Selection staff

**Records loads for DDA, e.g., Kanopy loads (Sharon)**

* Orono and Augusta are both using a Kanopy demand-drive acquisitions program
* The Kanopy collections are slightly different, and UMA has opted not to load the records, but Orono will be loading around 9800 records
* For DDA records, as with ejournals records, no additional records are attached until we purchase the item
* Duplication between Kanopy and FOD records, better records in Kanopy

**Duplicate bib records from multiple vendors (Cason)**

* How do we avoid the duplication issue? e.g. JSTOR DDA duplication with Ebrary titles and why is it happening?
* Sometimes the vendor has an agreement with OCLC to create records, and those records have unique OCLC #s, which provides a unique match point to remove duplicates
* Sometimes we have to move an 035 into 001 field to capture the unique OCLC #
* Conversation has to happen at multiple levels: getting increasing reports of finding multiple titles per search especially with ebook duplication
* Do we need to go to OCLC to advocate for deduplication? Yes
* In Minerva, we try to match on the OCLC # as much as possible, we try to make the records vendor-neutral
* OCLC is work on creating vendor-neutral records to reduce this duplication issue
* Is there a preference for obtaining records via Serials Solutions or OCLC?
* SkyRiver, an OCLC competitor scrapes records from unknown sources

**Examples of Keyword searches limited to umfk, books includes ebooks (Asita)**

* Solution: Change it to some other material type, and change it, save it, and go back in, save it as the correct mat type. This usually works
* Please send examples to Maine InfoNet in a ticket, there may be an issue that can be resolved in the system

**Cataloging Mentors (Jess)**

* Please do send questions to the group Chair; that way, we can determine whether or not it’s a Committee-level issue, or perhaps if there is an established practice to consult in one of our policy documents. Asking helps maintain consistency across the system.
* Sharon notes we are turning a corner and reestablishing our technical services departments
* The policy document may need to be updated and is helpful
* Orono’s Tech Services department documentation (link below) has been helpful
* We only meet 3 times a year so getting some communication in between meetings is helpful
* Ellen Conway is a resource at Maine InfoNet for Minerva cataloging help
* Lynn has been updating a lot of documentation for Sierra and Cataloging
* Everyone is grateful for all the cooperation and collaboration--USM has been so helpful with music and maps cataloging, MSL has been helpful for Orono as well
* Make sure that when you identify an improved record that you contact institutions which hold the item, and deleting records when last item is removed
* UMPI Library will need a lot of support and advice as they rebuild their collection and staff from the ground-up
* Advantage of sharing questions and concerns: we have different needs and perspectives and this can help us plan ahead
* UMA can shadow with UMF (Laurie) or other staff if helpful
* Cataloging Standards Committee Policy document: <http://www.maineinfonet.org/ursus/committees/catstandards/policies/>
* Fogler (Orono) Technical Services Documentation: <http://library.umaine.edu/techserv/techservweb.htm>
	+ Please send Fogler updated helpful resources that you find in your cataloging travels
* AUTOCAT-L: <https://listserv.syr.edu/scripts/wa.exe?SUBED1=AUTOCAT&A=1>
* e.g., new Public Performance Rights information in the catalog: when you consult with MIN or try a new workflow please send out the message to the group because it may help us establish best practices

**RDA Practices / Around the room**

How are we doing on RDA implementation? Updates to share around the room

* UMF-pretty much RDA-ing: we are not doing retrospective conversion, but we are adding new records in RDA format. Generally it is going fine. No new position/budget losses, still co-managing library, but now reporting to Provost rather than IT. Library is seen an active, vibrant center of the library. Laurie Godin is the current cataloger at UMF, but Bryce remains a policy contact for this group
* Law & Legislative Reference Library: never created anything but RDA records, growing digitization collections
* MSL Outreach/Books by mail/MSL: RDA since last year, transition for outreach services, at the point of dealing with the cataloging side of things, some of the titles linked to an older title, due to poor 001 field matches. MEK location is the MSL outreach collection. Jim’s contact information: jroy@mestate.lib.me.us
* UMPI: Roger Getz is the new UMPI Library Director. Lots of weeding was done prior to Roger’s arrival, an opportunity to rebuild the collection, a comprehensive inventory is needed. Need to do a lot of groundwork to establish the library as a meaningful place on the PI campus.
* Orono: shift in acquisitions away from individual approval plan and print orders towards more batch loading of records including DDA/PDA collections. Other areas include: gift collections processing, original cataloging of materials for Special Collections, analytics for existing serials and management of collection-loaded records loaded monthly for several different collections. Increasingly adding content to the Digital Commons, some items have parallel representation in URSUS and some do not, batch load processes help, but still putting things in both places, complimentary rather than duplicative information where appropriate. Moving towards electronic-only dissertations and theses, and student-submitted metadata and submission into the digital commons. Theses will still be represented in URSUS. Serials Solutions data indicates access to 500,000 monographic records and 100,000 journals thus troubleshooting e- access issues for even a tiny percentage significant. Digitization and ILS related duties for all staff.
* Bangor Public: in 7 weeks the library will be closed to the public for 8 weeks. November 16-January 18. Affects ILL sending and receiving of books. Will definitely impact regional libraries, e.g., Orono, UMA-Bangor, and Dyer Library (Hampden). Teams of BPL staff will be doing retagging of materials (RFID tags will help with tracking and inventory), find and catalog or remove “rogue” items. Shelflist cards: still use these because not everything is in Sierra yet, because they are using Dewey, the shelflist cards historically helped avoid duplication; confirmed it is appropriate to add Purchase Order information into Sierra Order Records (a z field may be added)
* BPL continued: One added feature of the renovation is the ability to have a bookstore-style display of books: “glades” for featuring subject and topic-specific collections. One way to help re-shelve and organize is to add stickers to the spine labels, e.g., Visual Arts. Barbara is going to create a list for MIN to help quickly update this information. MSL has dealt with this in a location code fashion, but location codes are not temporary, and given the rotating nature of the glades, using updated status will help BPL move materials through these glades.
* MSL BPL Portland: have a super book scanner “ark” for digitizing collections
* UMA: haven’t created any RDA records yet, hope to, new staff member hired in public-service facing role to replace Peggi’s position
* USM: Elizabeth is ½ time as of July 1. Rewritten job description 20 hours and University Cataloging Librarian title, Lanny retired, Elizabeth took on some of the materials, moved office and also transitioning, difficult to keep up on reduced schedule, using RDA for everything except rare books, waiting for the rare book community to update documentation of DCRM-B. Digitizing theses and dissertations and keeping hard copies. Lots of changes in the library- moving a big section of the student computers into the library. CTEL moved into the previous office space. Working out new liaison assignments. Roberta Ransley-Matteau, the cartographic cataloger reports to Head of Osher Map Library. Digitizing maps and 3-D globes. Joy Elsner 1 copy-cataloger / acquisitions person. Locations of library service points & Collections: Circ & Map Lib 1st, 2nd CTEL & Learning Commons, 4th admin offices, David Nutty is on the space committee for the University
* Fort Kent: Asita serials background, then cat & acq, copy cataloging, RDA 2 years so far, all new records are RDA compliant, the only cataloger at the library, continuing to use RDA, joined MSCC, going with the flow, Re: recent special collection gift acquisitions-Katie will come on campus for training with Leslie and Asita. Katie’s position is not being replaced. Asita is being reclassified. Other tech services person was ½ time and has been restored to full time.
* UMM: Split juvenile collection and created a YA collection to help increase use. RDA: no original cataloging in quite a while, focused on using RDA copy cataloging records.
* MIN: lounging, relaxing, eating grapes, homemade peach pie! Lots of new library system work MILS: small libraries 2nd set of Beta libraries being added soon: Maine Medical Center in Portland, Paris Library from South Paris. Update oddities: iii is aiming for quarterly updates (service packs), delaying implementation of these updates to avoid early adoption errors and issues. Later this month probably applying Service Pack 2. 45 minutes, hopefully
* MIN Board met last week: CEO of Innovative left abruptly, MIN board wants to meet with Innovative at next ALA(?) meeting to discuss long term sustainability of the company. How would getting a new ILS work--would an RFP be involved? Probably not.
* MIN OPAC notes from Albie: Terms of use statements 520 field turned on to label summaries, soon: talking with a rep from NOVEList select adding their content into the OPAC, highlights Goodreads, Series, Reading recommendations

**Other Business**

* MLA Annual conference is happening in Bangor November 16 & 17 <http://mainelibraries.org/Annual-Conference-2015>
* MSL Library question about certain order records displaying book covers: Syndetics book cover service locates covers based on an ISBN in the record, which some libraries add when creating temporary bibs to attach order records

**NEXT MEETING**

* **Friday, January 22, 2016**, Snow date: Friday, February 5, 2016

\*Please send updates regarding membership and contact information to the Committee Chair, Cason Snow

Helpful Web Links mentioned during meeting:

* Maine InfoNet Page for Cataloging Standards Committee

<http://www.maineinfonet.org/ursus/committees/catstandards/>

* Cataloging Standards Committee’s Policy Document

<http://www.maineinfonet.org/ursus/committees/catstandards/policies/>

* UM Technical Services Documentation

<http://library.umaine.edu/techserv/techservweb.htm>

* AUTOCAT-L Listserv (it is possible to subscribe in a digest format)

<https://listserv.syr.edu/scripts/wa.exe?SUBED1=AUTOCAT&A=1>