UMS Cataloging Standards Committee Meeting Minutes
September 19, 2003

Present: Sheila Bearor (LEG), Gretchen Brissette (PI), Sharon Fitzgerald (ORO), Laura Gallucci (SYS), Peggi Loveless (AUG), Elizabeth Phipps (GOR), Mary Saunders (MSL), Judy Steere (FAR), Lynn Wilcox (LAW)

Absent: Jean Clemons (MAC), Leslie Kelly (FK), Judie Leighton (BPL), Lanny Lumbert (USM), Susan Robertson (ORO)

1. Minutes from the May 30, 2003 meeting were adjusted to include Gretchen Brissette on the sub-committee to look over the policy manual. Minutes were accepted.

2. Minutes of the "Meet me" call on August 11, 2003 were accepted.

3. Review Connexion migration and training – Laura went over the **Update: Connection Migration and Training** handout. Release of Connexion client will be in three phases spread out over the course of a year. No end date to Passport determined yet but will be announced by OCLC six months in advance of the date. The committee decided against phased training and will wait on training until after CatME functionality is available in the client. Laura will keep a hand on making the decision as to when to schedule training.
    a. Orono is using Connexion. Biggest problem is printing labels. Down time and slow connections have not been reported in past three or four months.
    b. Farmington raised question of exporting item records. Orono will review string for exporting sent to Farmington.
    c. Question raised of exporting two item records with one bib.

4. Release 2002 Phase 3 upgrade – Laura reported delays by Innovative in getting the release out (was to be a June release). Release came three days before start of Fall semester. Laura is projecting the upgrade for our system will take place after the end of this semester. No plan for financial functions in Millennium serials in this release.
    a. Laura noted ongoing issues with integrity of accounting unit (FK, FAR, MAC, PI). Working with Innovative software engineering.
    b. Committee went over **Enhancements for Release 2002 Phase 3** handout to note importance (or not) of each enhancement and comment on any. Some require system settings. It was noted that many enhancements are what could already be done in the ASCII version. We should see increased speed in Millennium due to the reduction of network bandwidth requirements. (Reports of slowness with Millennium features – day to day processes – some libraries not into Millennium.)
    c. Laura noted that all financial transactions must be complete before the upgrade. A moratorium (date) will be set to have this done.

5. URL Checker in MilCat – Handout **Verifying URLs with URL Checker** from Laura. Process in MilCat: create review file (generate list of 856s); run checker from review file – gives customized report (will get error messages); can edit record (URL) – open record click on link and see what it is doing; can go to public display, find what URL should be, and cut and paste correct URL.
   a. Limitations: ORO not use in past for verification of e-journals – created such a large list (through system); timing of verification – timed out (due to slowness of system).
   b. More information coming regarding this software from Innovative. Not many libraries using URL checker. Sharon mentioned that Innovative may not want to develop this further since open access URL is where things are heading.

6. Review – comments about duplicate checking on ISBN in newly keyed records – (MSL) likes; (UMA) cuts down on acquisitions processing time; (ORO) not key in many records. Question if it just checks for ISBN or ISSN also? (Laura thinks publishers number.) It was noted that if this saves from ordering a duplicate book or from keying in a duplicate record, it is good.

7. Yankee Bib cleanup solution – refers to Yankee issue of the past (ORO): Yankee bibs came into the system with LCCN in the 001 which needs to be removed and correct OCLC number inserted. Laura put a review file together and came up with a way to correct this by a batch solution. Important for retrospective cleanup – Maine Infonet is linked to the 001. Could involve 10,000 records. After the committee reviewed the suggested solution in the handout **Yankee Bib Cleanup solution**, it was decided Laura would do this in batches to test and run the duplicate report after every load.
   a. Concern: Need to be certain that OCLC # and title from OCLC match title in URSUS since the LCCN is not necessarily a unique #.
   b. Laura will start doing some testing on this.

8. Issues related to Government Docs and Marcive
   a. Duplicates report and Docs with 019 issue – with Marcive load if old 001 # retired by OCLC and placed in 019, not match so get older record in system as well as new record. (OCLC runs duplication detection program and merges records in one new record with new OCLC # in 001 field and old # placed in 019.) What to do with retrospective? To start, ORO will go over duplicate report Laura will generate report for ORO and include with ORO's duplicate report. It was noted that the duplicate report only picks up first # in 019 field. If other numbers are in 019, never get picked up and old record remains on URSUS (never checked by duplicate run). Note: This happens with other records also – other than Marcive – be aware of this but cannot do anything about it at this point.

    b. Multiple 850 fields and multiple 001 fields cleanup (for Gov't Doc records) – Laura looking to cleanup duplicate 850 and 001 fields. Laura will get review file of Government Docs with 850 and 001 fields and run program which identifies exact duplicates and clears out all duplicates for 850 and 001 fields. Not know when this will be done. Since problem is no longer going on, this is a retrospective project.

9. Multiple versions – Handout **The problem with Multiple Versions**
    a. Issue is large. Laura put together a document which includes basic challenges as well as a section of the cataloging manual. Discussion took place to articulate what the problems are. Problems will be tackled one at a time. Need public service input on this issue as scoping is involved. Problems coming up since URSUS is growing and need to address these issues.
    b. Comments – (Lynn) Need bibliographic integrity; coding is complex. (Laura) Can go to OCLC to get definition of codes. OCLC has mapped material types to item types. We have not done this for our system. Some types represent fine line as to which to use. For our system define item type and map to material type. Scoping is a combination of material type and item type. (Gretchen) When adding multiple versions to one record, only first medium comes up in public display – major problem – not accurate or helpful for the patron.
    c. Questions raised – Can we get back limit to our own library in database maintenance? (Had to give this up for scoping in the public mode.) Could we have scoping and limiting to branch? (Item location and branch location are in the same table – probably problem is here.)
    d. Agreed we need to find some way to make the shared record system work.
    e. Committee looked at **challenges** section of handout. Need to explore these possibilities. Added three items to list:
        i. Serials, continued by Web format – close out paper record?
       ii. How define shared record? Definition of shared record was originally based on content. (Sheila)
      iii. Alternate title field with GMD – Laura and Sharon will create dummy record for Bridges of Madison County and explore turning off medium, putting in alternate title field and GMD, tighten up scopes.

10. Election of new Chair – postponed election until next meeting. Need to figure out a fair and equitable way to share the responsibility of committee leadership.

11. Next meeting – **January 16, 2004 in Bangor**; snow date – January 30, 2004 (Union room at Orono if necessary for snow date)

Respectfully submitted,
Judy Steere
Recorder for the day