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# I-Share Cataloging and Authority Control Team Minutes for August 03, 2010

Consortium of Academic and Research Libraries in Illinois

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## I-Share Cataloging and Authority Control Team (ICAT)

Meeting #42 Minutes

Tuesday, August 03, 2010

Conference call

**Members attending:** Mary Rose, chair (SIE), Susan Gallagher (UIS), Kristin Martin (UIC), Priscilla Matthews (ISU), Dennis McGuire (COL), Emily Prather-Rodgers (NCC), Cheryl Wegner (NBY)

**Members absent:** Lori Murphy (DPU), Pamela Thomas (ICC)

**IUG liaison attending:** Mary Burkee (UIU)

**Staff attending:** Casey Sutherland (CARLI staff liaison), Jessica Gibson, Cathy Salika,

## Decisions:

- Minutes from the July 19, 2010 meeting were approved as amended.
- Will meet by conference call on Sept. 7, 2010.
- Add the correction of invalid "record status" values to the "Suggested Maintenance Priorities" document as a low-priority project.
- Will schedule a test of webinar software, probably in September. Presenters must have their slides to Casey by EOB Sept. 15, 2010.
- Wait to formally create a subcommittee for RDA until Pam and Lori have had a chance to volunteer. The subcommittee will use the current ICAT email list to communicate.
- Priscilla suggested that ICAT announce the coming genre/form heading changes in the "What's New in Cataloging" webinar in September, saying that ICAT is preparing an announcement and working on a best practices document. Ultimately we will add a project to the "Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance" document.

## Discussions:

- **VoIP.** Two team members are still unsure of whether they will be able to participate in meetings using VoIP and will let the team know ASAP. If everyone can use VOIP, we will schedule a test of the equipment and software.
- **Invalid "record status" values.** Last spring, ISU found a number of records with the "record status" value of "d," and asked CARLI staff about it. Cathy Salika ran a report and found that there are a fair number of records in I-Share with invalid "report status" values. It was assumed that this problem originated in the migration to Voyager, but Cathy found that some records with invalid values are still being added (23 since the beginning of the year). While this is not a problem in our current catalog, it may (or may not) be in a future one, the team decided to add this to the "Suggested Priorities" document as a low-priority project.
- **MarcEdit workshops (Oct. 25-26, 2010).** These are still on track. Terry Reese has submitted all the necessary paperwork and is making travel arrangements.
- **Fall webinars (Sept. 21, 2010).** These are on track as well. We will schedule a test of the webinar

software, probably in September. Casey will need slides by end-of-business on Sept. 15, 2010. On the registration form, Casey will ask registrants whether they will be participating by conference call or VoIP, so she can have enough lines reserved on CARLI's new conference call software.

- **Tag tables.** Mary Rose tested these "rigorously." Jessica asked if anyone else would be testing. If not, she will go ahead and release them.
- **RDA subcommittee.** Mary Rose proposed some long-term tasks:
  - Provide guidance to I-Share members for when they come across RDA records.
  - Survey I-Share membership to get suggestions, opinions, needs and find expertise.
  - Evaluate the training schemes already available (from LC, for example) and work towards developing a training package.
  - Develop recommended workflows.
  - Plan for training: materials, instructors, forums, etc.

Mary Rose, Emily, Susan and Dennis volunteered and we will wait to see if Pam and Lori are interested. Since all of us are interested in the work of the subcommittee, it will use the current ICAT email list to communicate.

- **Genre/form heading changes.** Priscilla has identified 3 issues:
  - She is experimenting with how and where the headings display in Classic WebVoyage, VuFind and WebVoyage version 7
  - It doesn't look like validation of these headings is possible in Voyager. May not be able to control the headings in OCLC either.
  - Will need to standardize the headings that are already in the catalog.

In the fall webinar, ICAT will say to members only that genre/form heading changes are coming and that we're working on a more comprehensive announcement to be released perhaps in October 2010. We will create a best practices document for I-Share members. Ultimately we will add to the "Suggested Priorities" document.

## Reports:

- **CatER (Kristin).** Kristin had asked us to read "Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009). Final report," focusing specifically on recommendations R-20-R-22.
  - **R-20. "The Task Force recommends that IUG or an appropriate body review the current CARLI documentation on the Xenu link-checking software, evaluate its relevancy, and review other link-checking software options."** We asked if this was really something for ICAT to handle or if IUG should take this on. Mary Burkee will take this to IUG to get their thoughts on how to pursue link-checking.
  - **R-21. "The Task Force recommends that IUG facilitate one or more training sessions for I-Share catalogers on the application of the recommendations in this report, either in person or via the web" and R-22. "The Task Force recommends that the trainers of any training sessions (see R-21) be responsible for distilling training materials from this Task Force report."** Kristin will introduce the final report in the ICAT webinar she will be co-presenting in the fall. We agreed that there is potential for future training webinars.

For R-23, ICAT will review the "Best Practices for Bibliographic Records from Non-OCLC Sources" document and the "Cooperative Cataloging Guidelines for I-Share Databases" document. ICAT had previously discussed Cooperative Cataloging Guidelines document, and agreed that the only change

needed was to guideline number 8. IUG will tell us what the process is for updating the guidelines. ICAT will look at the best practices and discuss them in October. Kristin will highlight those areas that need the most work.

For R-25, Jessica will develop generic documentation for batch loading bibliographic records for electronic resources based on the existing documentation for the Springer e-book records.

- **IUG (Mary Burkee).** IUG has been restructured according to CARLI's recommendations. There was an organizational meeting July 14 at which they discussed CatER's final report (they were pleased with it) and discussed changes to VuFind, both completed and upcoming. They also discussed what was next for Voyager in terms of a big picture timeline, including future upgrades. CARLI staff are analyzing options, but no firm dates have been established for future upgrades.
- **CARLI Office (Casey).** Casey won't do a formal report as a rule because much of the information is included in the monthly CARLI newsletter that all team members receive. She will continue to bring to ICAT any matters that are applicable to our charge. Right now CARLI staff are working with the Center for Research Libraries to load bibliographic records for materials they had digitized and make them available to CRL member libraries. (Sixteen I-Share libraries are CRL members.)

**Shelved:** We will discuss the next steps on recommendations about 490s "later."

## Tasks assigned:

- Casey will add a low-priority project to reset various invalid and incorrect "record status" values in bibliographic records to the "Suggested Priorities for Bibliographic, Holding, and Item Record Maintenance" document. She will also create and post to the shared page a macro that resets those values to "c".
- Jessica will release the tag tables.
- Mary Rose will find out whether Pam and Lori are interested in serving on the RDA subcommittee.
- Mary Rose will amend the draft statement from ICAT on RDA to include the survey the subcommittee is planning.
- Priscilla will finish testing form/genre headings in the three I-Share interfaces this week. She will also email Gary Strawn to see whether his toolkit can be used to standardize headings already in the catalog, inquiring specifically about BAM functions and batch corrections.
- Mary Burkee will go to IUG to get their thoughts on how to pursue link-checking as recommended by the CatER Task Force (R-20 of their Final report).
- Kristin will introduce the Final report of the CatER Task Force in the ICAT webinar she is co-presenting in the fall.
- Mary Burkee will verify that we can go ahead and make the minor changes in point 8 of the Cooperative Cataloging Guidelines for I-Share Databases document to harmonize it with R23 of the CatER report. Kristin will highlight the relevant areas of the Best Practices for Bibliographic Records from Non-OCLC Sources document for us to discuss at October's meeting.
- Jessica will develop generic documentation for batch loading bibliographic records for electronic resources based on the existing documentation for the Springer e-book records for the November or December ICAT meeting.
- Kristin will establish a structure within the CARLI Wiki's I-Share section for users to post locally developed projects, which will also be a forum for sharing techniques for managing batch loading of vendor records.

The meeting adjourned at 11:27.

Submitted by Cheryl Wegner