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I-Share Cataloging and Authority Control Team Minutes for November 2, 2010

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I-Share Cataloging and Authority Control Team (ICAT)

Meeting #45 Minutes

Tuesday, Nov. 2, 2010

Meeting conducted using Adobe Connect webinar system

Members attending: Mary Rose, chair (SIE), Kristin Martin (UIC), Dennis McGuire (COL), Lori Murphy (DPU), Emily Prather-Rodgers (NCC), Pamela Thomas (ICC)

Members absent: Susan Gallagher (UIS), Priscilla Matthews (ISU), Cheryl Wegner (NBY)

IUG liaison attending: Mary Burkee (UIU)

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

Decisions:

- Minutes from the Oct. 5, 2010 meeting were approved as amended.
- Lori Murphy and Pam Thomas will review research done to date on series tracing, and develop recommendations for I-Share libraries.
- Kristin Martin, Mary Rose, and possibly Cheryl Wegner will review research done to date on the LC genre/form headings project and develop recommendations for I-Share libraries for managing the transition.
- ICAT will plan for its Spring Forum to be held at UI Springfield, on one of the follow days (in order of preference):
 1. May 17
 2. May 19
 3. May 18
 4. May 24
- ICAT gave authorization for CARLI to implement a new "do not process mode" in the daily OCLC file processing. Once implemented, OCLC update and produce transactions that contain an 049 \$o SKIP will cause that individual record to be removed from the library's file of records before any records are loaded into Voyager.
- Susan Gallagher and Pam Thomas will analyze the IRIS RDA survey results.
- Dennis McGuire and Mary Rose will prepare a final draft of interim RDA copy cataloging recommendations.

Discussions:

- 1) Review of MarcEdit workshops:

Shortly before the meeting, Casey sent out evaluations of the MARC edit workshops that had been received to date. The deadline for submitting evaluations is Nov. 3. Casey commented that the second workshop at Illinois State ran more smoothly than the workshop at Chicago State. ICAT members who attended in general felt the workshops were very informative and there was a lot of potential for use of the software. Terry Reese clearly

knew the software, but was perhaps not always the best presenter. A quick check of the comments revealed that there was some frustration in not having enough time for examples and having difficulty following the presentation. The comments also indicated interest in having more information about how to use the software in an I-Share environment, with specific examples. At the next meeting, once all of the comments are in, ICAT will review the feedback to determine additional continuing education possibilities using MarcEdit.

2) Previously, Priscilla Matthews had been working on creating recommendations for both the LC genre/form headings project and series tracing recommendations. In light of her continued leave of absence, ICAT decided to reassign those responsibilities to other members.

NEW BUSINESS:

3) ISBN overlay problems and potential solutions:

Mary Rose and Kristin Martin shared with ICAT the problem of incorrect overlays occurring in the union catalog, based on ISBNs in the record for multiple formats. The issue right now mainly affects records for print books getting overlaid with the record for the corresponding e-book or vice versa. This causes libraries' holdings to be attached to the record for the wrong format. Currently, the duplicate detection profile assigns a weight of 40 points to an ISBN and 60 points to a LCCN. That means that if a record has the same ISBN and LCCN as an existing record in the union catalog, it will be identified as a match and overlay the record in the union catalog, but the ISBNs on their own can create inappropriate overlays. Below is the scenario of events that can lead to this problem:

1. Monographs now have at least two ISBNs (10-digit & 13-digit) for each format. In the case of print, there might be four ISBNs (two for hardcover and two for paperback).
2. Batch-loaded vendor bib records for electronic monographs often have all four (or six) ISBNs in them (10- & 13-digit ISBNs for the electronic versions & also for all of the print versions) in \$a.
3. Some bib records for print monographs also have electronic ISBNs in them in \$a.
4. Dup detection settings (which were established before 1-3 above) assign a field weight of 40 to each ISBN.
5. As a result of 1-4, "bad" print/electronic overlays can occur, especially when batch-loading vendor bib records.

Possible Solutions:

1. Change the match weight to 20 for each ISBN and 80 for each LCCN. This would allow a matching ISBN/LCCN combination to continue to result in a match, but it would require five or more ISBNs to be present in both records to result in a match based on ISBNs alone
2. Move print ISBNs in e-book records to the 020 \$z. Unfortunately, with vendor records, vendors may not be able to distinguish between print and e-book ISBNs, and so could either move all ISBNs to the 020 \$z or none of the ISBNs to the 020 \$z. If all are moved to the 020 \$z, in VuFind they would be excluded from the ISBN index and thus no e-books could be searched for and retrieved by ISBN.

ICAT discussed these options and preferred option 1. The main question now becomes a question of timing. Casey explained the complications. Previously, when CARLI adjusted the UC dup detection settings in the past, they did so in conjunction with a "UC rebuild" whereby the old UC is completely deleted and a new one built from scratch. Changing the dup detection settings in conjunction with a UC rebuild means the new UCdb has

the dup detection settings applied consistently to all records in the UC. However, due to competing priorities, a UC rebuild cannot be scheduled until January/February at the earliest and there is no guarantee of a rebuild happening this academic year. If the detection settings are changed now, existing bad overlays won't get fixed and could be made worse if one of the libraries with holdings on the bad overlays were to update their record again after the dup detection is changed. Their update might not match their existing holdings (depending on the other data in the bibs), and the library could end up with the same holdings on both the print AND e-book bib. A UC rebuild would fix all of the existing problems with false overlays and duplicated holdings. Changing the duplicate detection settings immediately, however, would mean that future vendor record loads would be less likely to create additional false overlays in the union catalog. ICAT did not come to a conclusion about when to change the UC's dup detection settings and agreed to think about this until the next meeting.

4) Best Practices for Non-OCLC records document. Kristin shared with ICAT her initial revision of the document and discussed several questions. She will write up a new revision with the assumption that we will adjust the duplicate detection profile, even if the timing has not yet been determined. New information about ISBNs and overlay will be included in the document. Information about restrictions on record use will be retained. The recommendation to catalog at the collection level will be moved to the background section and the language adjusted.

5) "Do not process" bulk import mode: Casey received a request from a library doing a substantial amount of original cataloging in OCLC. This library wanted to have a "do not process" mode for OCLC records because they were directly exporting the records into their local Voyager database after cataloging, rather than waiting for the nightly OCLC file processing. As a result their log file had become cluttered with reject/discard information, making it hard for the library to identify true problems. Casey provided a suggestion of 049 \$x SKIP (later updated to 049 \$o SKIP) to provide this function. It will be different from the current "no holdings mode" (049 \$m no) because the new mode will skip the entire bibliographic record as opposed to loading the bib but not creating any holdings. ICAT agreed to the proposal. CARLI staff will revise the OCLC daily load scripts and Casey will update the "Using OCLC ..." document to add the new mode.

STANDING REPORTS:

6) IRIS subcommittee: Mary R. provided a quick synopsis of IRIS activities. The survey of RDA knowledge and needs of I-Share library is completed. Susan and Pam will analyze the results. Dennis and Mary will prepare a final draft of interim RDA copy cataloging recommendations.

7) IUG report: Mary B. shared with ICAT the IUG Plan of Investigation and Action, FY2011. They are considering "anything and everything" as potential systems to provide access to I-Share library resources. URM (Unified Resource Management) Framework is Ex Libris's new system under development .

The meeting adjourned at 11:30 AM.

Submitted by Kristin Martin