



Welcome!

Technical Services Q&A will start at 10:00 a.m. and run until 11:30 a.m.

Please mute your microphone.

This session will be recorded and made available on the CARLI website.



CARLI

TECHNICAL SERVICES Q&A:
COOPERATIVE CATALOGING POLICIES

June 28, 2023

Cooperative Cataloging Policies

The CARLI I-Share Participant Institution Agreement outlines the terms for institutional participation in I-Share and the responsibilities of participating institutions. These terms include that a participant shall, “Provide and maintain current bibliographic data in I-Share describing the library’s collection, holdings and item availability status in acceptable formats and quality standards,” according to the instructions in this document.

Technical Services Committee Review Process

2021-2022

- Review existing documents, identify core elements, redundancies, ambiguities
- Reframe for current context
 - System: Alma & Primo VE
 - Evolving standards: RDA, expected developments in MARC and BibFrame
 - Expected competencies of catalogers at member libraries

2022-2023

- Draft a single combined policies document from previous *Cooperative Cataloging Guidelines for I-Share Databases* and *Standards for Bibliographic Records in I-Share*.
- Refine document to be concise and approachable for different audiences

Policies: OCLC Membership

- I. I-Share member libraries will be members in good standing of OCLC. This entails the following obligations:
 1. Familiarity and compliance with OCLC's WorldCat Principles of Cooperation.
 2. Represent holdings in WorldCat for permanent physical and electronic collections.
 3. Enhance and correct records in WorldCat following OCLC Bibliographic Formats and Standards. Minimally, member libraries should report errors found in WorldCat records.
 4. Original cataloging performed in WorldCat following OCLC Bibliographic Formats and Standards, Chapter 4, "When to input a new record."

Policies: Contributing Collection Metadata

- II. I-Share member libraries will contribute cataloging data that accurately describe their physical and electronic collections following current descriptive and technical standards. These include the following formats and accompanying standards.
 1. Full-level cataloging
 2. Cataloging record sources
 3. Authorized access points
 4. Single record per manifestation
 5. Provider-neutral records for electronic resources
 6. Holdings statements for physical inventory
 7. Details for accessing electronic inventory
 8. Digital objects

Policies: Cooperative Cataloging Best Practices

III. I-Share member libraries will collaborate with CARLI and other libraries to identify and improve the accuracy and completeness of shared catalog data, and they will respect the effort of other member libraries.

1. Quality control and routine library data maintenance
2. CARLI consortial data maintenance
3. Do no harm to existing records
4. Retain access points
5. Withdrawn records

Policies: Records that should be shared

IV. Bibliographic records for I-Share member libraries' permanent collections should be shared with the network to improve consortial data on holdings. These data support consortium-wide discovery, copy cataloging, resource sharing, and collection retention.

1. Search the I-Share Network Zone for candidate bibliographic records and use an appropriate record found there first before importing a “new” record from another source.
2. Member libraries should routinely identify unlinked IZ bibliographic records and attempt to link or contribute these records to the NZ.

Policies: Records that need not be shared

- V. I-Share member libraries may retain bibliographic records in their Institution Zone only (i.e., remain unlinked from the Network Zone) under the following limited circumstances. Member libraries may apply lesser cataloging standards than “full-level cataloging” to unlinked records, and these resources may still be discoverable via the “All I-Share Libraries” search slot in Primo VE.
 1. Records for temporary collections
 2. Brief records for equipment and loanable technology
 3. Records contractually restricted from sharing
 4. Records for interlibrary loan items

Policies: Bibliographic Control Numbers

VI. Bibliographic control numbers are essential to effective duplicate control and necessary for many types of automated maintenance. Record matching between IZ and NZ is based on the OCLC system number. Member libraries should choose records that contain OCLC control numbers whenever possible. If OCLC control numbers are not present, prefer records that contain another system control number that identifies the record uniquely (e.g., ISBN, ISSN, vendor control number, vendor title number, etc.).

Policies: Copy-Specific Details

VII. Copy-specific details. Member libraries should record copy-specific details in institution-level inventory records, such as holdings and items or portfolios, and selectively in bibliographic local extensions.

1. Call numbers
2. Notes
3. Locally-relevant access points



YOUR QUESTIONS...



Questions for Follow-up



Bonus Rollover Topic: Grace Periods

<https://www.carli.illinois.edu/products-services/i-share/acquisitions/graceperiod>

- Alma fiscal periods fixed by the calendar as 365 days
- Extend use of ledger and/or fund by grace period days
 - Positive value extends the period by the number of days entered
 - Negative value shortens the period (e.g., sets your cutoff point early)
- Best to enter at ledger level and at fund levels being extended
 - If catching up late invoices, focus on the funds that appear