CARLI

TECH SERVICES Q&A 1/13/2021
COOPERATIVE CATALOGING

https://www.carli.illinois.edu/products-services/i-share/cat/coop-cat-guidelines

- **Network Zone records are a shared resource**
  - Records should have OCLC numbers
  - Keep records consistent with what they describe
    - Fix errors, merge duplicates, improve quality
    - Use a new record when required
  - Record matching in NZ uses OCLC number only
- **Guidelines revision will happen later this year**
- **What doesn't fit in the NZ?**
  - Acquisitions data
  - Personal copies / reserve materials
  - Temporary collections (e.g., McNaughton lease plan)
  - Loanable technology (e.g., podcasting mic, iPads, laptops)
  - ILL materials (e.g., resources from outside I-Share)

Orbis Cascade

- personal-copy course reserves
- titles borrowed on ILL from outside the Alliance
- inventory control of equipment
- host bibliographic records for bound-withs
- suppressed bibliographic records
- vendor record sets that the library is not allowed to share

SUNY

- Personal-copy course reserves
- Titles borrowed on ILL from outside the consortia
- Inventory control of equipment
- Host bibliographic records for bound-withs
- Suppressed bibliographic records
- Vendor record sets that the library is not allowed to share (proprietary vendor records)

- Bound withs = Host bibliographic records
  - Should only be saved in institution zones
  - Best practice: suppress and use "related records" functionality
  - Valid practice: improve the bib as if cataloging the whole item
  - Bad practice: OCLC numbers in host records
    - DO NOT add 035 fields to host bibliographic records
- Still more to explore on this topic, particularly related records

Cataloger Permission Levels = MDE cataloging privileges

- Cataloger roles enable access to the MDE
- Cataloger levels enable access to edit records of certain levels
    - E.g., OCLC levels: search, limited, full, enhance, NACO, CONSER, etc.
    - If user's cataloger level >= bib record cat level: access to shared record
    - If user's cataloger level < bib record cat level: no access to shared bib
        - May add local extensions only
        - May add holdings and inventory
        - May copy record to IZ
- Cataloger levels are not factored into import profiles
- How should cataloger levels be assigned? Think on this.

Records have catalog levels, too.

- Records not touched since migration at level 00
- Records import with level 00
- Records levels may be set via job
- Current IZ default assigns cataloger's assigned level to bib

How should catalog levels be assigned to bibs?

- Most of the time, cat levels should not be elevated
- May change the IZ default behavior—or push from the NZ
  - Config > Resources > General > Other Settings
  - Use_record_cataloging_level_by_default – keep the record's level
- Elevate the level when the shared record should be preserved
  - Need to provide time for libraries to use localize bibs

What are other consortia doing? Not much.

Code	Description
00	Default Level
10	Cataloging Student
20	Rapid Cat/Acquisitions Copy Cataloger
40	Copy Cataloger
50	Cataloging Supervisor
70	Special Formats/Special Collections
90	CARLI Office

- First guess based on possible staff cataloging positions

- Also set out to help SpColl catalogers protect their records

- Are better options available?

  - More emphasis on why a record has a higher level?

  - Levels for cooperative record management?

  - Your ideas?

CARLI I-Share

00:15:06   e0042721:   Hello--George Woolsey from Elmhurst here.

00:49:03   Diane: There was a point in a previous slide about cataloging levels can be set by a job. Does this mean that we can group certain records and change the record level in a batch job?

00:51:13   Jolanta Radzik: Is there a report I can run in Analytics or a search I can perform in Alma that would identify all the bound-withs / host bibs?

00:52:19   Eric N.: There is a set in the shared sets area for host bib records

00:52:20   Jessica Gibson: Host bibliographic record for boundwith

00:52:22   Jolanta Radzik: Got it! Thank you.

00:54:51   Trisha: What cataloging level is needed to overlay a network record with a updated record from World Cat? Perhaps that's why I wasn't able to perform this.

00:55:06   e0042721:   I often deal with older bib records. Records are constantly being upgraded in OCLC. As a Level 50 cataloger trying to upgrade old records would a general guideline be to consider ALL OCLC additions be acceptable as not changing the resource? Perhaps a matter of interpretation?

00:59:59   Gail H: Forgive an ignorant question (and perhaps I missed this when I had to step out of my office), but where do we see the cataloger level in Alma? If we are in a small library (and have an inexperienced cataloger), what level should we have as our top level?

01:00:37   Rachel Park: I'm wondering how to handle electronic serials with title changes where vendor information from the community zone lumps access and bib info under the most recent title. Sorry if this is too off topic!

01:03:32   Trisha: thank you.

01:07:30   e0042721:   Thanks for your comments. My question about OCLC bibs doesn't pertains to merge mistakes, but to the addition of new indexes that make what is a spare NZ record more applicable to a worldwide user group.

01:11:47   e0042721:   Would you demonstrate the process of changing the cataloger level of a single bib record. I am dealing with 2 bibs in the NZ that lack Dewey numbers, but Dewey numbers exist in the OCLC records from which they were derived. The bibs' cataloger level (70) is 20 higher than the one I currently have. We are a Dewey library. What can I do?

01:12:50   Stephanie Henricks: Just curious, when you have a bib record with a holding record-is there a limit to the amount of items attached to that record? For example 60 -100 identical textbooks. Steph

01:15:17   Jolanta Radzik: @Stephanie: I have a one record with 60 items attached and have not received any errors, yet.

01:15:30   Gail H: Thanks, Ted, that was very helpful.

01:16:15   Stephanie Henricks: Good to know Jolanta, we are about to do a text book loan program with another department in the college.

01:17:29   Diane: Does the new MDE default to cataloger level 00 instead of the cataloger upgrading the record's level?

01:18:50   e0042721:   How would you define "Special formats""Special collections" with regards to cataloger levels?

01:21:12   e0042721:   I worked on 14 books within the last week that were current acquisitions. 6 of the records for these were Level 70 for the bib records (I could not alter them)

01:24:29   Rachel Park: That's what we would hope for too, but we have found some vendors that don't provide records for the previous titles. Children's Literature Association Quarterly from Project Muse is the example I can think of off the top of my head.

01:25:38   Rachel Park: used to be called CHLAQ

01:26:07   Rachel Park: Thanks for investigating!

01:30:16   e0042721:   The OCLC numbers without the Dewey numbers are:

01:31:22   e0042721:   Sorry, Ted the numbers I'm asking about without Dewey numbers are: #1139202885 and #11100673109.

01:33:59   Cindy Bowen: would re-exporting the OCLC record into the NZ reset the cataloger level? or is that kept when the record is updated?

01:34:44   e0042721:   Sorry. The number was: #1110673109

01:36:53   e0042721:   How about, "082 04" for that?

01:38:05   Brent Eckert: You could also add the Dewey number to the record in OCLC and then export it to Alma. That would benefit all libraries that use OCLC.

01:39:43   e0042721:   What you are seeing is an LC assigned Dewey number.

01:40:34   e0042721:   You can do what you are doing with Cat Level 50?

01:41:33   Brent Eckert: If you use the gateway export then cataloger level doesn't matter.

01:41:41   Jennifer Masciadrelli: @Stephanie: according to https://knowledge.exlibrisgroup.com/Alma/Product_Materials/050Alma_FAQs/Print_Resource_Management/Item_Records there is no limit to the number of holding and item records that can be added

01:42:07   Stephanie Henricks: Thank you Jennifer!

01:42:47   e0042721:   Very helpful to me, hope everyone else also. Many thanks.

01:45:19   Cindy Bowen: I'm certain after watching this that I've accidentally saved things at a higher level than is needed... (oops) how would you recommend going back and finding (and fixing!) those?

01:45:47   e0042721:   If I overlay an NZ record with a more current one, I try to preserve all network library 9XX (local fields) plus a few local 8XX ones. Is there any other fields I should look for to preserve?

01:47:46   Cindy Bowen: huzzah, thank you! I love how easy Alma makes it to do some of these cleanup tasks :)

01:51:34   e0042721:   That would be up to my other colleagues to judge. I'd just copy what they once added even if it may be no longer current.

01:52:29   Jolanta Radzik: Thank you. Very helpful!

01:52:31   Sharon Nelson: Thank you!

01:52:43   Drew Tatlock: Thank you!

01:52:43   Stephanie Henricks: Thank you!

01:52:47   Cindy Bowen: thank you!