SWAN Cataloging Advisory & Acquisitions User Groups Meeting

May 9, 2019
9:30 a.m. – 12:00 n.

RAILS Burr Ridge
Main Meeting Room

Agenda

1. Introduction
2. EDI Report Consolidation
3. BCA Acquisitions Reports Update
4. Disappearing Dates Cataloged and 946 Data – Update
5. Open Discussion – Acquisitions

   BREAK

6. Blu-Ray/DVD Combo Pack Proposal Presentation
7. MARC tag ordering fix
8. Unauthorized Genre Terms fix
9. Cataloging Standards update
10. Oak Lawn Processing Robot Presentation (MARGE)
11. Open Discussion – Cataloging

The next Cataloging Advisory Group Meeting will be Thursday, August 22nd at 10:00 a.m. at the Oak Lawn Public Library in Meeting Room B.

1. Introduction

2. EDI Report Consolidation

SWAN will be working with Acquisitions libraries in an attempt to reduce the number of EDI reports that need to run throughout the day. In particular, some sites are running Transmission and Retrieval reports multiple times throughout the day for different vendors, though these can generally be run just once. We will also be examining acquisitions reports in general to find ways to streamline the process and reduce strain on the report queue.

SWAN will be reaching out to and directly consulting with libraries where changes in report practices can be identified.

3. BCA Acquisitions Reports Update

Sam Dietel gave a demo of some new reports available via BlueCloud Analytics taking advantage of the newly-available Acquisitions data. These reports were still being refined at the time of the meeting but were made available shortly after.

4. Disappearing Dates Cataloged and 946 Data Update

SWAN made some headway in identifying the source of two problems affecting our bibliographic data. The first involved the Date Cataloged field. Fully-cataloged records are identified by this field, which indicates a the complete catalog record was imported, often overlaying a pre-cat or Acquisitions record. These dates were disappearing seemingly at random. We were able to identify the source of this error in a report template setting and have corrected the issue. This should resolve the issue, but SWAN will continue to monitor the situation.

The second problem was similar and involved the disappearance of 946 signature fields, which are used to identify the library and cataloger responsible for creating a record or pre-cat. These were also disappearing seemingly at random. We traced this issue to the Midwest Tape configuration of a number of our libraries using the Acquisitions module. Incoming Midwest Tape records were attempting to write to this field, and a quirk of the "Load Bibs with Order Info" report removed the field as a result. We worked with Midwest Tape to change the configuration of our Acquisitions libraries in a manner that would minimally affect their operations. Midwest Tape reports will no longer attempt to write to the 946 field.

6. Blu-Ray/DVD Combo Pack Configurations Proposal

SWAN has come up with a potential solution to the ongoing discussion we have been having about Blu-Ray/DVD combo pack procedures. The solution depends on reconfiguring how our indexing processes handle standard numbers, which will require some testing by SWAN over the summer. Once we have confirmation that the proposal is viable, implementation will also require a full database rebuild, which we hope to accomplish in the fall if possible. We will have a final set of

guidelines for libraries to follow ready for the August 22nd Cataloging Advisory Group meeting. These guidelines will likely be accompanied by an updated set of standards for inputting ISBN, UPC, and ISSN values, so once they are finalized, all member staff interacting with our bibliographic database will be asked to familiarize themselves with the changes regardless of their local combo pack practices.

7. MARC Tag Ordering Fix

SWAN implemented a fix to the order of MARC tags in our bibliographic records. All MARC tags need to be configured in Symphony before they can be used. Configuration includes defining valid indicators and subfields, setting up indexing behavior, and adding the field to the appropriate bibliographic formats. Any fields configured after we launched on Symphony in 2015 were appearing at the bottom of bibliographic records regardless of their numerical standing. The most prominent of these was the 385 "Audience Characteristics" field, which users expect to find near the other 3xx fields.

The default order of MARC fields is hard coded in the Symphony database. SWAN worked with SirsiDynix to reorder these fields. MARC fields will now appear in numerical order.

8. Unauthorized Genre Terms Fix

SWAN collects authority records for Library of Congress Genre/Form Terms (LCGFT) terms that appear in our bibliographic database. However, in bibliographic records, these headings continue to display the "UNAUTHORIZED" tag even when the authority record existed in our database. We implemented a partial fix to this by redefining the authorization setup in the Symphony database. Though these settings are now correct and should improve the situation, we will not see a complete fix until the database undergoes a rebuild.

9. Cataloging Standards Update

The Cataloging Standards documents presented at the March Cataloging Advisory Group meeting raised a lot of questions and required further discussion. Bibliographic Services has begun working with a task force of some member staff from our OCLC Cataloging Libraries to review these documents and further refine them. We are meeting monthly and will continue to meet for as long as it takes to come to an agreement on these standards. We will be discussing a set of required and recommended fields in full cataloging as well as fields to delete in copy cataloging. The goal is to come up with a set of guidelines that allow as much autonomy as possible for cataloging staff while accommodating the complex needs of working in a large, shared database.

We anticipate wrapping up discussion this September or October and which point we will share our conclusions with the membership at large.

10. Oak Lawn Processing Robot Presentation

Due to a scheduling conflict, this presentation has been postponed. It will take place during our August 22nd Cataloging Advisory Group meeting.