



SWAN Cataloging Advisory Notes

Thursday, July 09, 2020, 01:30 PM – 04:00 PM

GoToMeeting

Register on L2 - <https://www.librarylearning.info/events/?eventID=30249>

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Chairs:

- Scott Brandwein, chair, SWAN

- I. Welcome and introductions
- II. Record Management Update – June reports
- III. Item Type Consolidation Update – Video and Audio materials
- IV. Genre headings – Facet and usage.
- V. Reimagining Library of Things – MARCONLINE records
 - a. Is this something we want to pursue?
 - b. Brainstorming
- VI. Foreign-Language Materials – Refinement of standards?
 - a. 242 Field inclusion?
 - b. 650 requirements
- VII. BLUEcloud Cataloging Search Issues
- VIII. Aspen Discovery evaluation
- IX. Cataloging Library Requirements revision: Postponement of agreement.
- X. OHM (OCLC Holdings Manager) Update
- XI. Next Meeting

Thursday, September 03, 2020, 01:30 PM – 04:00 PM (Location TBD) - Register on L2

[\[https://www.librarylearning.info/events/?eventID=30250\]](https://www.librarylearning.info/events/?eventID=30250)

1. Welcome and Introductions

The recording of this meeting is available on YouTube: <https://youtu.be/PdQ66pW135s>

2. Record Management Update – June Reports

Claudia gave an updates on her progress with the Record Management process and showed some initial findings. The results seemed in line with group expectations. We will continue this process in a slightly scaled back form. Our initial goal of examining 25% of incoming catalog records turned out far too time-consuming, especially as technical services departments returned to more normal operations in the late spring. Since the inconsistencies we are finding are repeated and relatively rare, we are comfortable looking at fewer records.

The materials Claudia provided can be examined as part of the Meeting Packet.

3. Item Type Consolidation Update

Sam gave a progress update on Item Type Consolidation and the libraries we have reached out to with suggestions for deprecating underused item types. Feedback has been mixed. We have been able to eliminate use of a few types at specific libraries, but others have reasons to continue with their current plan, which is fine as well. We are approaching the data migration strategy for the 3 incoming libraries with this project in mind and hope to align their item type layout with a unified SWAN strategy.

The spreadsheet Sam created to analyze video materials can be examined as part of the Meeting Packet.

4. Genre Headings – Facets and Usage

The group discussed the test instance of a new search facet that separates out 655 field genre terms. This facet allows Enterprise searchers to limit results by genres such as “Biography”, “Cookbooks”, “Horror fiction”, etc. The LCGFT vocabulary contains other types of terms that identify age level and format, but we have suppressed terms from display that *only* describe things in this way and are duplicated by other data points. For example “Children’s maps” duplicates the age level and format facets, so this term does not display in the genre facet, whereas “Children’s television programs” will display because there is not an existing way to identify television programs.

The group suggested changing the default sort of the genre facet to be alphabetical. Currently, the facet sorts in order of use, which makes it difficult to find a known term in the list if it does not appear near the top. We will investigate whether this is possible.

5. Reimagining Library of Things/MARCONLINE Records

This was our suggestion for the next larger-scale project this group can tackle, and we have identified a few topics related to Library of Things and local (MARCONLINE) records that SWAN is taking to the drawing board to start drafting.

First, we are considering use of a SirsiDynix format policy to identify local records. This policy would be defined in on Symphony alongside MARC, VM, MUSIC, and other format-driven policies that govern MARC field labels and tag validity. The primary function this would serve is to easy identify and filter these records from reports. These records can make pre-cat reports, OCLC holdings maintenance, MARC field matching, and other types of analysis more difficult due to their tendency towards non-traditional cataloging standards and varying use cases from one library to another.

We have also revisited a conversation that started about a year and a half ago regarding shared records for ephemera and Library of Things items. While we know that many libraries will prefer to use local records for these for simplicity (for example, using a single record for all hotspots no matter the brand and specifications), there is interest in using OCLC records for commercially available devices, equipment, and other out-of-the-box items as well as shared, yet still generic records for things like umbrellas and cake pans. SWAN draft a proposed strategy for this and Cataloging Advisory will work out a more detailed proposal at our next meeting in September.

6. Foreign-Language Materials

We had a somewhat generalized discussion of records for foreign-language materials. These are the highlights:

650 Fields and Difficulty with Unfamiliar Languages

The group agreed that our local 650 fields for language are not sufficient to satisfy local guidelines requiring at least one valid subject heading per record. These fields will not count towards subject evaluation, and a topic heading is still required if a language heading is used.

Members raised concerns that it can often be difficult to perform accurate subject analysis on items in unfamiliar languages. While SWAN will be adjusting language in our standards regarding this clarification, we are sympathetic to this difficulty and understand that it will not always be possible to perform subject analysis. We will approach these records with that in mind and lend support where possible. We are also going to brainstorm ways in which members might be able to offer and receive assistance from local language specialists when needed.

Foreign-Language A/V Materials

The group discussed 245 title fields for foreign-language video materials. Catalog records will often have fields sourced from title screens that present titles in non-Roman scripts that are used as primary access points on Enterprise and also print to receipts and notices. We have agreed that it would be best to circumvent “traditional” cataloging guidelines and instead source titles from packaging, which more often displays English equivalents.

This is something that some libraries have been doing all along, but we will codify it as accepted practice in the documentation. We will also be drafting some foreign-language record guidelines as a helper document for those catalogers less comfortable with these items.

7. BLUEcloud Search Issues

We highlighted some search anomalies with BLUEcloud Cataloging that we suspected were the result of failures in our BLUEcloud indexing. At the meeting, we mentioned that this problem existed and that we were in communication with SirsiDynix representatives about it. Since the meeting, we’ve received word that the indexing issues were not limited to SWAN and that a fix was put in place. Our indexing has run successfully since, but we are still investigating the impact this may have had on searching.

8. Aspen Discovery Evaluation

This topic was merely a heads up that SWAN would like to enlist Cataloging Advisory’s help in evaluating the Aspen Discovery platform in concert with the Discovery and User Experience group. We are still configuring the platform and undergoing training, so there is nothing to do quite yet. Later this summer or fall, we will reach out for volunteers and provide more details.

9. Cataloging Library Requirements Postponement

Earlier this year, Cataloging Advisory rewrote the requirements for SWAN Cataloging Library participation with the goal of having existing libraries sign an updated agreement. We have decided to postpone this agreement process until calendar year 2021 as library administration has enough to worry about at the moment. We will revisit this in January or February if appropriate.

10. OHM Update

Here we shared that we will be helping the participating LLSAPs with their first OHM OCLC holdings updates starting the week of July 27th. Each week we will process one of the five groups' records. After each has undergone one update, we will be able to perform OCLC updates on demand.