SWAN Cataloging Working Group 07/09/2025 Meeting Minutes

Attendance:

Cataloging Libraries Present: Joy Anhalt (TPS), Rebecca Bartlett (LGS), Victoria Bitters (ESS), Marie Constuna (CSD), Jenny Cuevas (ADD), Stephanie DeYoung (BLD), Diana DiPierro (LPS), Rita Hassert (MAS), Bronwen Heneghan (TCD), Julie Johnston (GED), Susana Leyva (DGS), Ann Marie Lindsey (GED), Eden Morris (ADD), Emily Parker (LGS), Kira Riddle (DGS), Paul Rubio (ADD), Jessica Rutka (TPS), Melissa Siddiqui (OBS), Julie Tegtmeier (SCD), Nicolette Vaillancourt (NUD), Colleen White (OPS).

SWAN Staff: Cynthia Romanowski (Chair), Lucas McKeever, Diane Nickolaou, Angela Puckett.

Meeting summary for Cataloging Working (07/09/2025)

Quick recap

Cynthia Romanowski led the meeting by providing the group with updates on Backstage and the ongoing OCLC project, including their current statuses. The team also discussed the handling of Deluxe limited-edition books, considering whether to merge or keep them separate, and addressed issues with Audiobooks that arrive with different disc counts compared to the existing PRE-CATs. Additionally, a discussion was held about how to display multi-volume series in Aspen. Finally, Lucas McKeever demonstrated a new feature on the SWAN support site that highlights recent updates.

Next steps

- Cynthia to reach out to Tara Wood for potential discussion on volume display in Aspen
- Lucas and Cynthia to figure out if there is a way to highlight the actual changes to the support site documentation
- Cynthia to get confirmation on the bibliographic records with holds and DISCARD items

Backstage update

Cynthia explained that the extensive clean-up project involving Backstage and SWAN's bibliographic data was postponed due to scheduling conflicts and was now planned for Labor Day weekend. She noted that an issue with one of the sample records needed resolution before the SWAN bibliographic data could be sent for cleaning. She also mentioned that since SWAN typically performs rebuilds and large indexing projects during holidays, we were unable to proceed with the comprehensive clean-up as planned, as doing so would have missed the July 4th holiday. Therefore, it was decided to start with a monthly data upload, which did not include MARCONLINE records.

Regarding indexing challenges, Cynthia pointed out that many stem from authority records. Since we are new to Backstage, they do not yet have our authority records that were within WorkFlows. Consequently, they sent an authorized authority record for each heading found in the monthly export of our bibliographic records, rather than only those records missing from our database or needing updates. This resulted in over 19,100 authority records. The delays are further exacerbated when a single heading appears in both the monthly bibliographic records and existing records, potentially causing hundreds of thousands of records to be reindexed instead of just the recent or a few thousand records.

SWAN will review the situation following the August load to determine whether we can proceed with loading authority records or if we should provide Backstage with our authority file dataset to reduce the size of future files. This approach aims to make the monthly authority record updates smaller and more manageable. Regardless of the August process, an Authority Rebuild will be necessary over Christmas or New Year's.

Cynthia also mentioned that the larger extract of the bibliographic database and subsequent indexing rebuilds will now be scheduled for Labor Day weekend to minimize disruption to the daily operations of our member libraries.

OCLC Clean-up work updates

Cynthia highlighted the efforts of the SWAN staff, particularly regarding a Large Print project where many items were either not fully cataloged or incorrectly cataloged. She also noted that older PRE-CAT records had never been assigned a catalog date because they lacked a 977 PRE-CAT marker, causing them to be overlooked by the standard PRE-CAT reports.

Furthermore, she mentioned that numerous records still have a catalog date marked as NEVER, indicating that this will remain an ongoing initiative. Cynthia expressed appreciation for the cataloging libraries that assisted with this project and emphasized her effort to respect the workload she assigned to them. She conveyed that member libraries and SWAN staff are working as a team in this collaborative environment, and their combined efforts are significantly improving the experience for colleagues and patrons alike. Additionally, she

reported that she has not encountered any further issues with Real Time Availability (RTA), and she credited the work done with aiding in deduplication efforts.

Deluxe limited-edition books

Lucas provided an example of such a book: https://www.amazon.com/Scarlet-Veil-Deluxe-Limited/dp/0063419394. The group discussed whether to merge these records when there are no noticeable differences between the standard and deluxe editions. Some libraries expressed a preference for treating these editions similarly to different bindings, like paperback versus hardcover as patrons do not seem to mind one way or the other. Others raised concerns that this approach might conflict with standard cataloging practices regarding when to create a new record in OCLC and could set a precedent for overlooking more subtle or detailed differences between editions. Implementing this would add an extra layer of complexity for SWAN and Cataloging Libraries, potentially leading to confusion about when to merge or keep deluxe editions separate. Since no consensus was reached on merging these records, Cynthia decided that SWAN would continue to keep these items separate until OCLC merges the editions or proper cataloging standards are applied for creating new records.

Audiobooks with different number of discs (by 1 disc) but same ISBN, run time, narrator, etc.

Lucas clarified that the discrepancies in the audiobooks stemmed from whether reading guides and other PDF materials were included on the final disc of the main audiobook or provided as a separate, additional disc without audio content. Due to these variations, it was challenging to distinguish between vendor order records and the items received by the library, as not all libraries noted the number of discs included in each item. It was recommended to address this issue with all member libraries, which will be done at the next Acquisitions and Cataloging Networking Group Meeting. SWAN staff will not merge audiobook records that contain different information until the records are fully cataloged. Member libraries were encouraged to submit merge requests, though there was a possibility that records might not be merged if they differ significantly or if multiple records are in PRE-CAT status.

Cataloging libraries should overlay a full record onto a PRE-CAT record that was associated with their item. However, they should not overlay or modify a fully cataloged record if the 977 PRE-CAT tag was not present in the record. Instead, libraries were encouraged to import a new record for their item and transfer their item to this new record. Additionally, it would be helpful if they could notify SWAN about the record, enabling SWAN staff to follow up with libraries regarding the original record and confirm the correct cataloging information for their item.

Cynthia mentioned that when cataloging libraries find that an audiobook title has multiple PRE-CAT records in WorkFlows, such as differences in the number of discs, please submit a ticket to SWAN. This will alert us so we can verify with other libraries whether they have the correct record, especially if they have received the item.

Volume numbers for ranges or multi-volume sets

Cynthia emphasized that we have control over how series were displayed in Aspen and highlighted the importance of adhering to the established entries for both authorized and unauthorized headings, as this directly affects Aspen's presentation. This includes adding a volume number for these series, using the author's website or publisher's site to get this information. She also requested collaboration with their public/adult/teen services team to clean up series records within WorkFlows, so that SWAN staff are not responsible for all cleanup tasks. Additionally, she initiated a discussion on cataloging materials that contain two or more issues of a series and how they are displayed in the Aspen catalog, especially in relation to the new Series Page feature. Cynthia explained that authors often release a set of volumes with themes (e.g., Christmas) or multiple volumes within a compilation. The correct cataloging approach is to create separate 800 entries for each part, as illustrated by the title control number a1398581 for "A Cold Creek Christmas Story" and "Christmas in Cold Creek" by RaeAnne Thayne.

> For Cataloging, these volumes (9 and 14 respectively) should appear in two separate 800 fields.

1. 800 1_ Thayne, RaeAnne.|tCowboys of Cold Creek ;|v9.
2. 800 1_ Thayne, RaeAnne.|tCowboys of Cold Creek ;|v14.

The discussion focused on how series entries are displayed in Aspen. Participants suggested that it would be helpful if each volume could appear twice on the series page, with each entry linked to a different volume number. Currently, Aspen's Series Page creates two entries, but both show the same volume in the results list instead of distinguishing between the two. Achieving the desired functionality might require additional monetary investment.

Since current functionality works with one line, a suggestion was to ask DUX to determine if there was a preference of how the volumes should appear in Aspen.

> a. 9, 14
> b. 9 & 14
> c. 1-2
> d. 1 & 2
> e. 1, 2, 5
> f. 1-2, 5
> g. Etc.

"Updated" tag for documentation on support site

Lucas pointed out a new feature on the SWAN support site that indicates which documentation has been recently updated. The support pages will now display a "New" or "Updated" label for one week after they are created or modified. During this time, they will appear on the support site's homepage under the "New & Updated" section when logged in.

Additionally, a request was made to clearly specify what was changed on pages when they are marked as "Updated." This will help users quickly understand the nature of the updates, facilitating easier adjustments to their processes and printed procedures. Cynthia and Lucas will explore methods to implement this change in a way that ensures sustainable maintenance.

Open Discussion

A member of the cataloging library inquired about a known issue in OCLC Connexion related to controlling headings, which many members have been experiencing. Details about this known issue can be found here: https://help.oclc.org/Metadata_Services/Connexion/Connexion_known_issues/Connexion_client_known_issues#Control_headings. Cynthia explained that this problem is due to a hard-coded issue in how OCLC calls up authorized headings pages and recommended reporting it to OCLC support at support@oclc.org. Currently, OCLC Connexion automatically opens Internet Explorer, and there is no way to prevent this, even with default app settings. This behavior causes errors, which OCLC needs to address. Reporting the issue will help OCLC gauge its impact and expedite a fix.

Additionally, there was a discussion about patron holds. It was understood that SWAN no longer moves patron holds, which prevented materials from being fully discarded in the catalog. Cynthia will verify this and determine if there is a workaround to remove holds that block items from being removed. The outcome will be communicated to the library and shared with other cataloging libraries along with the response.

Next Meeting on Zoom: Thursday, October 9, at 9:30 AM