

Minutes of the Cataloging Project Team Meeting June 16, 2017

1. New Committee Structure

During the GUGM meeting on June 15, 2017, the Cataloging Functional Team and the Cataloging Project Team was charged with determining how they foresaw the group(s) going forward. The following proposal to RACL is an amalgamation of the "Caucus" meeting, email on G3CAT and this, June 16, meeting of the Project Team. RACL will determine that exact name(s) of the evolved committee(s) which would go into effect September of this year.

Proposal:

- The Cataloging Functional Team will be comprised of three positions
 - o **Chair** – Shelley Rogers nominated [Debra Skinner, Georgia Southern University](#) – approved by Caucus
 - o **Vice-Chair** – Shelly Rogers nominated [Kelly Holt, University of Georgia](#) – approved by Caucus
 - o **Secretary** – Debra Skinner nominated [Guy Frost, Valdosta State University](#) – approved via email/WebEx meeting
 - It was noted that this position is new to Functional Committees of GIL; This is the first Minutes of the Project Team Meeting and may be a reflection of the perceived need for the change.
- Terms are for 1 year and as the Chair cycles off, the Vice-Chair becomes the Chair, the Minutes taker becomes the Vice-Chair, and a new Minutes taker is elected
- New members were added to this revised team during the GUGM meeting; existing members can be added for those that wish to remain

2. Charge for Committee

- a. The Committee will develop a Communication Plan to help all
 - i. G2CAT will remain in place for the Cataloging Community at Large
 - ii. G3CAT will remain to the Post-Project Team to work
 - iii. NZ maintenance needs to be coordinated in conjunction with the Subcommittees until a centralized Cataloging Coordinator is hired
 - iv. To achieve 2.a.iii, the following Subcommittees were proposed
 - 1. Authorities
 - 2. Best Practices
 - 3. Training and Documentation (includes Training Wiki)
 - v. These Interim Volunteers taking on work for the Cataloging Coordinator's duties follow a similar model from the Project Team Subcommittees
 - 1. Alma General: Debra Skinner and Julie Dyles Darken (UGA)
 - 2. Authorities: Guy Frost and Shelley Rogers
 - 3. Best Practices: Guy Frost, Kelly Holt, and Robin Fay (UNG)
 - 4. Wiki: Robin Fay
 - vi. Clean up projects and how to do them need to be addressed by current members
 - vii. Procedures for Coordinating the Ticketing System also need to be addressed
 - viii. The Project Team will continue to meet weekly until recognized as not being necessary
 - ix. Greater Communication with OPAC/Discovery, Acquisitions and GIL Coordinating Committees; no longer working in Silos as we have been; Alma is significantly more integrated

- x. Attending appropriate meetings (Institutional Leads, Teach Chairs, Others as assigned)

3. Defining Brief Records (Levels 01-10)

A lengthy discussion on the Brief Level records took place. Clarification was given by Bill Potter regarding Cataloging Roles vs. Brief level roles.

- They are separate and do not impact each other
 - o Frost, stated a Merge Rule could be applied for batch loading of records (e.g., WorldShare nightly loads)
- Brief Level roles are analogous to the ELvL: levels in MARC21
- Current Brief Levels are controlled by a Brief Level Rule
 - o Charge: Committee needs to define what that should be
 - o Susan Wynne will share on G3CAT Emory's documentation
- Rogers noted that (as explained in second rule below) that it starts at the highest level defined in the rule and reduces to the next level when that criteria is not met
- There are multiple Brief Level rules that appear to be utilized

FIRST

The LDR Rule: drools/BriefBasedOnLDR.dslr

The Script is as follows:

```
rule "Brief 01"
when
  (existsControl "LDR.{17,1}.5")
then
  set brief_level."01"
end

rule "Brief 02"
when
  (existsControl "LDR.{17,1}.3")
then
  set brief_level."02"
end

rule "Brief 03"
when
  (existsControl "LDR.{17,1}.J") OR
  (existsControl "LDR.{17,1}.j")
then
  set brief_level."03"
end

rule "Brief 04"
when
  (existsControl "LDR.{17,1}.7")
then
  set brief_level."04"
end
```

```
rule "Brief 05"
when
  (existsControl "LDR.{17,1}.2")
then
  set brief_level."05"
end
```

```
rule "Brief 06"
when
  (existsControl "LDR.{17,1}.M") OR
  (existsControl "LDR.{17,1}.m")
then
  set brief_level."06"
end
```

```
rule "Brief 07"
when
  (existsControl "LDR.{17,1}.K") OR
  (existsControl "LDR.{17,1}.k")
then
  set brief_level."07"
end
```

```
rule "Brief 08"
when
  (existsControl "LDR.{17,1}.8")
then
  set brief_level."08"
end
```

```
rule "Brief 09"
when
  (existsControl "LDR.{17,1}.4")
then
  set brief_level."09"
end
```

```
rule "Brief 10"
when
  ((existsControl "LDR.{17,1}.1") OR (existsControl "LDR.{17,1}.L") OR (existsControl
"LDR.{17,1}.l") OR (existsControl "LDR.{17,1}. ") OR (existsControl "LDR.{17,1}.!")) OR
(existsControl "LDR.{17,1}.i"))
then

  set brief_level."10"
end
```

```
rule "set default"
```

```
priority 1
when
    TRUE
then
    set brief_level."01"
end
```

SECOND

The Current Rule Label is: drools/BriefBasedOnRecordContent_Marc21.dslr

Note, the description below is built into the drool

The script is as follows:

```
rule "Brief 01"
# Note:
# 1. The priority and the setting of the brief level works as follows:
#   The higher priority happens before the lower priority (priority 2 before priority 1)
#   The rule will continue through all of the priorities until it reaches the last one for which is is
"satisfied"
# 2. The higher the brief_level -> the more complete the record
#   The lower the brief_level -> the more incomplete the record
#   (Brief level 10 is more complete than brief level 9)
```

```
priority 1
when
    not exists "245.a.*"
then
    set brief_level."01"
end
```

```
rule "Brief 02"
priority 2
when
    not exists "050.a.*" AND not exists "082.a.*"
then
    set brief_level."02"
end
```

```
rule "Brief 03"
# Note that actions stipulated in the rule with the higher priority are performed first.
priority 3
when
    not exists "020.a.*" AND not exists "022.a.*"
then
    set brief_level."03"
end
```

```
rule "Brief 04"
priority 4
when
```

```
not exists "6**.a.*"  
then  
  set brief_level."04"  
end
```

```
rule "Brief 10 catch-all default"  
priority 5  
when  
  TRUE  
then  
  set brief_level."10"  
end
```

4. Best Practices Needed

- a. Withdrawn Location vs. Withdrawing via Deletion
 - i. Guy and Ken Smith (from Valdosta), and Kelly and Simon Hunt (from UGA) will look at the pros and cons of either function to accompanying the Training Wiki Procedures
 1. Procedures for doing both workflows are already populated on the Training Wiki
- b. Best practices for holdings for electronic publications and OCLC. This is something that needs to be assessed and a policy established for all of USG. It is most important for the OCLC Data Sync which will attach holdings.

5. Issues with Merge Rules

- a. Catalogers have noticed that some imported records retain the 260 field along with the 264 when overlaying (merging) Alma Records with OCLC records. This is due to how the Merge rule is coded.

The Current Rule Label is: drools/OverlayAllFiefsButLocal.dslr

The script is as follows:

```
rule "Merge Example 1"  
  when  
    merge  
  then  
    replace MARC.XXX excluding "001,035,9XX"  
    replace MARC."035" excluding MARC."035"("9","#")  
  end
```

- b. The above Drool needs to be revised to reflect the presence of 264 (if 264 delete 260)

Submitted by Guy Frost, June 19, 2017