

Minutes for June 23, 2017 **USG Cataloging Team** Meeting

1. **Primo Dedupe Subcommittee update (Julie)**

Julie Dyles Darken (UGA), head of the Dedupe Subgroup, provided an update on the progress the team has made of looking at the algorithms used in Merging of similar records in Primo.

A meeting is being schedule with Orbis Cascade to determine their experience of using only the 035 OCLC number as a matching point instead of current algorithm. [Scheduled for July 29]

Guy encouraged everyone to send examples of questionable Primo mergings to Julie. Julie provided her email in chat.

The Subgroup Consists of: Julie Dyles Darken (UGA), Kristin Nielsen (UGA), Guy Frost (VSU), and Scott Piepenburg (VSU)

2. **Training Wiki (Robin)**

Robin Fay (UNG) gave an update on the Training Project Team.

- The Team recognized that is was a great resources and should continue.
- A better mechanism to cross populate documentation that impacts more than one area is needed (e.g., Cataloging and Acquisitions)
- Currently there is not a way to provide a Google Search on the Training Wiki with the newer version of site. Alternatives for hosting are being considered.
- Going forward, documentation should be updated to maintain currency. Barry will look into a mechanism that would alert catalogers (and others) that something has been updated.
 - o The possibility of "subscribing" to documents could provide such an alert
 - o Barry is developing the Alma upgrade test process and will include documentation review. Each committee's charge should include responsibilities for document creation, maintenance, and review.

3. Draft Proposal for RACL (sent via email to G2 and G3)

Attached is a draft proposal for RACL of this Committee as we envision it's should be moving forward (see Attachment A).

- Sections in Red reflect changes/additions to the original draft discussed and approved during the meeting

4. Brief Record Requirements

A discussion of the brief levels as they pertain to completeness was discussed. The drool script found on the previous minutes meeting was shown and discussed.

Guy mentioned that the issue came up because of the proliferation of 01 level records and their confusion with the 030 levels established at the NZ by Bob/Bill/Sean

Title	The F/C family of saxophones
MMS ID	9912264824102962
Brief level	01
Originating system	OCLC

The above image was show which provides context to Brief level 01. The script in the drool (below) shows how algorithm works.

```
# (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
```

In order for a bibliographic level to be set to Brief Level 02, it must have and 050.a. and an 082.a. Many of the records in the USG catalog lack both because no Dewey number was assigned (082) or the LC call number was placed in the 090 field instead of the 050.

Guy mentioned one possible solution in this instance would be to change 082 to 090, which in turn would indicate presence of either 050 or 090 would fulfill Brief Level 02 requirements. This does not resolve all issues and should be shown to be example of change only.

Kelly provided a Knowledge Base link to further explain how the Rule works:

https://knowledge.exlibrisgroup.com/Alma/Knowledge_Articles/How_does_Alma_define_a_brief_record%3F

More research needs to be done to see if these levels are needed for identifying Brief Level records or can/should be used in searching or Analytics.

Robin will chair a subcommittee to explore Brief Level record requirements

5. Bibliographic Records with No Holdings - When to delete and when to retain - Need policy
 - Julie stated that if a project was underway to delete old POs and that left the bib record hanging (with no one else using the bib) it should be deleted
 - It was also noted that Megan at ExLibris cautioned deleting bibliographic records with no holdings because they could be associated with BoundWiths
 - o Further investigation of how these could be identified needs to be pursued
 - o May need to add a consortia level 9XX field to mark these as being a BoundWith bibliographic record which could then be removed/excluded from reports
 - o Shelley mentioned that for newer records, allowing for a 3-5 year grace period might be considered
 - Withdraws were also brought up. There was little to update. Guy and Ken Smith have looked at analytics to see exactly what the withdrawing function is doing. It was noted that periodical issues and serial added volumes are treated the same (marked as issues in Alma).
 - o One possible workaround for this is to code serial added volumes as Book rather than issue
 - o Best Practices will work with the Withdrawn Subcommittee
6. Electronic resources - Holdings in OCLC Best Practice for GIL

The importance of coming to a consensus about attaching holdings to electronic records was recognized in regard to the Data Sync scheduled for the near future.

 - Reservations form UNG and via email, Georgia State about this process.

- Many ebooks do not have OCLC numbers; Guy thinks these could be omitted from Data Sync if identified
- Deletion of holdings from OCLC post-Data Sync was discussed
 - If records could be identified as a set, a batch delete job could be run
- UGA and Valdosta noted that they have not added holdings to purchased ebooks (packages) in the past; UNG said they have been inconsistent

7. Questions, Concerns

- Further discussion on the Multimatch issue followed. It was noted that some items, like institution specific resources accidentally cataloged twice could be merged now as no one else would have the resource. Everyone seemed to agree. Shelley will test merging her duplicate records (30) for which no one else has holdings.

For the others, it was pointed out by Guy that even though two NZ records could be merged, it is possible another institution(s) could have a multimatch record sitting in their IZ not linked to the NZ and would need to be notified. We may want to triage some of the work of multimatch to get it started (i.e., records with many holdings are skipped for now).

It was also noted that the merge function does work, but is labor intensive. Debra Skinner is looking further at this hoping for guidance from ExLibris

The Cataloging Coordinator position may be needed for such a project. Position has not been posted yet but the target hiring is for FY18. The Authorities position would be reviewed for FY19.

- More information on the *WorldShare Collection Manager* service and how it works was mentioned. Kelly will ask Debra to talk about this at the next meeting. More information can be viewed on the OCLC site: <http://www.oclc.org/en/worldshare-metadata.html>.

Meeting Adjourned at 10:55; minutes submitted by Guy Frost and Robin Fay

Cataloging Team Proposal Recommendation for Ongoing Structure

June 2017

DRAFT FOR TEAM REVIEW

New Committee Structure

During the GIL Users Group Meeting on June 15, 2017, the ALMA Cataloging Functional Team and the GIL Cataloging Team were charged with determining the ongoing structure for the GIL/ALMA teams through consolidating the two teams into one working committee or team. The following proposal to RACL is an amalgamation of the “Caucus” meeting at GUGM, email on G3CAT and the June 16, 2017, meeting of the Alma Cataloging Functional Team. It is anticipated that, upon approval by RACL, the new team structure will take place in September of 2017.

Proposal for Initial Leadership and Offices

The name of the new amalgamated group is USG Cataloging Team (USGCT). It is recommended that the new Cataloging Team be comprised of the following three positions with initial officers as listed. The choice of officers from the Vanguard schools allows for continuity during the team transition, especially vital due to the number of ongoing initiatives related to cataloging and ALMA.

Chair – Shelley Rogers nominated ***Debra Skinner, Georgia Southern University*** – approved by Caucus

Vice-Chair – Shelley Rogers nominated ***Kelly Holt, University of Georgia*** – approved by Caucus

Secretary – Debra Skinner nominated ***Guy Frost, Valdosta State University*** – approved via email/WebEx meeting

The position of secretary is new to Functional Committees of GIL. The need for this position has become apparent over the course of preparing for Alma implementation with the need for documentation and keeping track of action items and decisions. Going forward, this role will continue to be essential as policies, workflows and documentation for Alma continue to be developed. Essence notes will be posted with other team documentation, workflows, and procedures to allow all catalogers to keep up with team activities.

Terms of Service

It is recommended that terms of service be for one year and as the Chair cycles off, the Vice-Chair becomes the Chair; the Secretary becomes the Vice-Chair; and a new Secretary is elected. This degree of continuity is important for the Cataloging Team due to the complex issues surrounding centralized cataloging and authority control and the many initiatives and projects in progress.

Charge

- Attendance and participation by Chair and/or Vice-Chair in appropriate meetings as assigned including monthly ALMA Institutional Lead and Implementation Team Lead meetings.
- Communication with all GiL library catalogers. It is recommended that two avenues of communication remain, identical to or similar in nature to the current G3CAT and G2CAT list serves. G2CAT serves as a communication mechanism for the GiL cataloging community at large while G3CAT is needed for the work of the Cataloging Team as it continues in the new format. The Cataloging team will work with GIL Support to maintain established list serves.
- Review monthly Alma release notes and inform GIL catalogers regarding testing or implementation of new features or capabilities.
- Review quarterly Primo release notes and inform GIL catalogers regarding testing or implementation of new features or capabilities.
- Coordination of Network Zone maintenance will be the responsibility of the Cataloging Team until such time as state level staff is available to provide systematic coordination.
- Management and coordination of a ticketing and triage system to assist all GIL catalogers with questions, problems, and cataloging assistance.
- Management of metadata cleanup and improvement projects including the duplicate (multimatch) records resulting from the merging of consortia catalogs.
- Communicate and work closely with OPAC/Discovery, Acquisitions, and the GIL Coordinating Committees.
- Coordination of subcommittees essential to cooperative cataloging for the consortium. The subcommittees were established during the ALMA implementation project and should continue to function in a similar model. They are composed primarily of Cataloging Team members but may also include volunteers not serving on the Cataloging Team.
 - o ALMA Cataloging Triage and Support Subcommittee, coordinated by Debra Skinner, Georgia Southern University; Julie Dyles Darken, University of Georgia
 - o Authority Control Subcommittee, coordinated by Guy Frost, Valdosta State University; Shelley Rogers, University of West Georgia
 - o Best Practices Subcommittee, coordinated by Guy Frost , Valdosta State University; Kelly Holt, University of Georgia; Robin Fay, University of North Georgia
 - o Training and Documentation Subcommittee, coordinated by Robin Fay, University of North Georgia
- Develop working procedures with future system cataloging positions requested in terms of policies, workflows, cleanup projects, authority control.

Meeting Schedule

- The Cataloging Team will continue to meet online on a weekly basis during the ALMA transition. When the team decides that weekly meetings are no longer required, a meeting schedule will be established by team members with monthly

meetings as a minimum. Essence notes will be created and distributed to GIL catalogers after each meeting.

Membership

New members were added to this revised team through a volunteer sign-up during the GUGM meeting. Membership can be revisited annually at GUGM meeting. The initial team roster is listed below.

Name	Institution	email
Debra Skinner, Chair	Georgia Southern University	dskinner@georgiasouthern.edu
Kelly Holt, Vice-Chair Guy Frost, Secretary	University of Georgia Valdosta State University	kholt@uga.edu gfrost@valdosta.edu
Julie Dyles Darken Robin Fay	University of Georgia University of North Georgia	jdyles@uga.edu robin.fay@ung.edu
Bokshim Fox	Georgia Southwestern State University	Bokshim.fox@gsw.edu
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Scott Piepenberg Jim Rickerson Shelley Rogers	Valdosta State University Gordon State College University of West Georgia	srpiepenberg@valdosta.edu jrickerson@gordonstate.edu shelley@westga.edu
Kristi Smith	Armstrong State University	kristi.smith@armstrong.edu
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