**Minutes of the Cataloguing and Authorities Users' Group**
**5 July 2010, 10:00 a.m., Robarts Rm 4049**

*Present*: James Mason (music), Mary Reynolds (Regis), Lisa Andrews-Attwater (Rotman), Wedny Li (Hong Kong), Kate MacDonald (Trinity), Barbara Geiger (St. Augustine's), Monica Hypher (CIRHR), Carmen Socknat (Victoria College), Anna Golodmitsky (Knox), Sherry Smugler (Gout), Fabiano Rocha (Robarts), Elisa Sze (Inforum), Sian Meikle (ITS), Alastair Boyd (Robarts), David Eden (New College)

## 1. Minutes from 3 May 2010 Meeting

Minutes approved.

## 2. Report from the Metadata Librarian (Marlene van Ballegooie)

- ### Serials concatenation update:

*Holdings with orders attached*: Marlene has been running tests; the second test consisted of 40 titles and 95% were able to transfer easily with only some minor issues remaining. Some types of records were problematic: those with outstanding claims; those with reserves associated with them; and those transferred to Downsview that have orders attached associated with old call numbers.

> *Question: Are you looking at active and inactive periodicals? Marlene responded yes.*

*Master record selection process:*

Marlene explained the process that she developed to select the master record. She looked at the presence of standard numbers, e.g. lccn; conser standard, and the minimal standard requirements for a record and then created a scoring rubric with standard numbers scoring higher and every other field receiving 1 point. To test, she printed out all records to be merged, and gave Alastair a set while keeping one for herself to compare to the computer's selection based on the script to a human's selection. Alastair came up with 49/50 compared to the choices selected by running the script, so Marlene felt confident in using it to make the selection. In the event of a tie, the larger record will be selected.

> *Comment: Government publications will have to be excluded because the same rules were not necessarily followed or applicable and concatenating them may result in the loss of valuable information.*
>
> Response from Alastair: He suggested it would be good to identify records created outside of normal rules that these should not be included.
>
> *Question: What about serials where there is an individual record for an item because it was a themed issue?*
>
> Marlene clarified that while she plans to use the script to select the records, there is a manual aspect to making the final decision, and if there is any doubt she will not merge the records together.

*Monographic series catalogued as serials:*

Alastair said there are a number of these in Robarts and they were in the process of converting them; these would not be involved in the concatenation since there would be no matches made.

### Concatenation and 599 fields:

In the last meeting someone had asked whether the 599 field will still show the specific library holdings. Using *The Walrus* as an example, Marlene demonstrated that in the concatenated records retain the individual 599 fields with the libraries' code that translates into specific library names in the OPAC.

### Holding statements and transfers to Downsview:

Resulting from the serials concatenation project was a side project to address confusing holdings statements associated with transfers Downsview. Marlene spoke to reference staff who indicated that it is difficult to see where an item actually is—that is, an item record is updated but the holdings records are not.

Marlene observed that some libraries have been changing the codes in 852a| location, but she is concerned that they do not realize how certain codes translate in the OPAC. For example, in Endeca, using the code Offsite translates to "moving to offsite: no requests." Other examples were provided and Alastair handed around a sheet detailing the specific descriptions that will show in the public catalogue.

The main thing to remember is that no one should be using the code location Offsite because it will show as something else.

> *Observation: Serials cannot be requested as a whole, and only articles can be; it may be confusing to patrons that they cannot request entire series.*

*Downsview new location code*

Marlene was waiting to hear from reference department about what they think of the Downsview code replacing Stacks, though this should not be done until items arrive there; this could be updated afterwards by script.

Alastair: there have been a couple of cases where library name has already been changed to Downsview; if you want to make it apparent in the catalogue that your holdings are held there it is better to use the new location in MARC holdings record but not to change the library code itself, though perhaps maybe it doesn't matter. As well, if changed to Downsview, people may think they have to go there to get it.

> *Question/observation: Textual label does not have to be Downsview; instead it could be a more abstract term instead that would not make people think that it is a location that they have to go to.*
>
> *Question/Comment: Libraries also need to be aware if they are still receiving material that they should not change 852; will they have to add another holdings line specifically for Downsview?*
>
> Marlene instructed group to not bother changing anything if only some are going to Downsview and to write a note instead saying that partial holdings sent. Idea is to keep the OPAC as comprehensible as possible to patrons, and it is up-to individual libraries sending items to Downsview to update the holdings if they have only sent a partial the run.

Alastair posed the question to the group to consider whether they would like one record for e-holdings and print holdings combined. This question came up after a meeting with OCUL libraries and he heard that UTL was the only library system adding e-access links to records for print. Other libraries were not doing it because of potential problems with e-holdings if access lost.

856-could be moved from bib rec. back to MARC holdings rec; would be easier to remove;

Sian: commented that this would affect how this would be displayed in old version of catalogue but would work in Endeca.

> *Comment: someone suggested that it would be easier to find online versions for patrons if records for e-resources and print were combined.*

**Other business:**

No other business.

**Next meeting:** 13 September 2010