

SCRAP Meeting Minutes

Wednesday, October 14, 2020

9:30 am

Zoom

Meeting Attendees:

SCRAP Members: Lynn Krambeer (LFK), Tammy Skwierczynski (GRK), Lynne Rubio (DPK), John Lavalie, (DPK), Jamie King (NIK), Sandra DeSio (WGK), Helga Scherer (MGK)

CCS Staff: Rachel Fischer (CCS), Debra Wischmeyer (CCS), Virginia Seward (CCS)

Non-Members: Linda Conn (CPQ), Brad Peterson (CPQ), Sara Scodius (NBK), Jeannie Dilger (PAK), Violet Jaffe (PAK), Lay Diep (PAK), Shelby Ricci (PAK), Jessica Thomson (WLK), Jan Davis (GRK), Judy Haynes (NBK), Gretchen Kottkamp (PRK), Kristi Napolitano (PAK), Becky Halcli (GCK), Shirley Roitberg (MHK), Lauren Bochat (PRK), Danette Zingsheim (GRK)

1. Palatine would like to create bibliographic records for Forthcoming titles before items are ordered. Examples of Palatine's forthcoming records are in record set: pak forthcoming_20201007111628.

Overview of the request: Jeannie Dilger (PAK) presented on the Palatine's request to allow records to be created for forthcoming titles. Prior to joining CCS Palatine added records for forthcoming titles to the catalog. These were for movies in the theater that have not been released yet, or for anticipated books by popular authors. Palatine creates the forthcoming records for multiple formats, i.e. Blu-Ray and DVD records. This helps selectors gauge interest in a title so they know how many copies to purchase, because they know they will be popular. CCS does not have a current process for forthcoming records. Palatine's existing forthcoming records were loaded, but they have not added any new forthcoming records. They delete the records and holds after 18 months if the item is never released. Patrons immediately noticed that the records were not in the catalog once Palatine began to use Polaris. They assumed a lack of a record would mean that a title would not be ordered and questioned the library about it. J. Dilger would like to know if they can resume creating forthcoming records and are aware that they are responsible for cleaning up the records and following CCS bibliographic input standards. All records will be made holdable for all CCS patrons. However, Palatine would be willing to make them holdable to Palatine patrons only.

Discussion: The SCRAP members and CCS staff discussed the topic with the Palatine staff. The topics of discussion included Palatine's bibliographic input standards for forthcoming records and their workflow, the effects on placing holds, merging records, the creation of items and the acquisitions workflow. Forthcoming records may not have a title or standard number. They have included "Untitled" in records when there is no title. Palatine is willing to follow the bibliographic input standards that CCS requires. Concern was voiced over the affect that not having standard numbers or correct title would have on the merging process. Adding ISBN or UPCs at the time of ordering and upgrading the record to an on-order record would allow the

records to be able to be merged properly. Having multiple PDRs is not problematic, because they will be merged when the final record is input. However, CCS would not want to see every library creating separate forthcoming records. Other libraries can add item records to forthcoming records. One item record will be needed so the bibliographic record can be visible in the PAC, but it will need to be deleted when an order is placed to avoid duplicate item records. Palatine is interested in making the records holdable by all CCS libraries. If some are only holdable by Palatine patrons, it may cause additional problems. D. Wischmeyer is in favor of allowing everything to be holdable by all library patrons. If there are multiple records and patrons place holds on them, there will be duplicate holds when records are merged. Those that place holds on forthcoming records will be at the top of the holds queue, after the local patrons that place holds for the items at their local library. Holds in the database currently expire after 1 year. Palatine's practice had been to delete forthcoming records and holds after 18 months if they item was not published. The group discussed extending when holds would be deleted to 18 months, but Palatine would be fine with deleting the holds automatically after 1 year. When making a motion to recommend allowing forthcoming records, it needs to be made for all libraries, not just Palatine. D. Wischmeyer said that recommendation can be taken to the next DBM meeting in November. If they recommend, it will go back to SCRAP to draft an amendment for the bibliographic input standards, which will need to be approved by governing board, but Palatine may not need to wait for approval of the standards to begin using forthcoming records.

MOTION: J. Lavalie made a motion for the recommendation to allow libraries to create forthcoming records. S. DeSio seconded the motion. The motion passed by voice vote.

DISCUSSION: The discussion continued on the bibliographic standards for forthcoming records. R. Fischer will create a draft of the standards and send it to SCRAP before next meeting. The standards should include the 099 field for PDRs and allow only a proper author in the 100 field. Notes should be added to note fields. If a note is meant for patrons to see, it can be added to the 520 field. Forthcoming in capital letters can be placed in the 520 field. Including a 945 with a Forthcoming note is a possibility. If it should be holdable, should be brought to DBM for discussion. The item record's call number can have the word FORTHCOMING, but libraries will not be required to do it.

2. LCGFT "Novels of Manners" and the local heading "Regency Fiction" (S. DeSio and L. Rubio).

S. DeSio and L. Rubio presented on the topic at PAS. PAS would like to continue to use both subject headings. CCS can already use both genre terms. Reminder at CAMM Novels of manners is available and can be used. L. Rubio and S. DeSio will do a presentation at CAMM on the topic.

3. Edition statement for Wonderbooks/VOX books

Since the TOM for Wonderbooks/VOX books is audiobooks, it is not clear that it is a book with audio. There is no icon for book + audio. The 250 helps explain that. SCRAP discussed if the publisher needs to be in the 250. The group decided that it is all right to accept the edition statement as it is in the OCLC record, and that [Book + Audio] should be placed after it. If there is no edition statement, [Book + Audio] should be included in the 250 field. R. Fischer will update the Wiki page: http://www.ccslib.org/Catalogers/index.php/Wonderbooks_and_VOX_Books.

4. Serials – Recap of e-mail discussion.

a. 006 for periodical in serials records (J. King)

The 006 for periodical is needed to display the TOM for periodical, including magazine and newspaper. R. Fischer will add this to the Wiki. V. Seward will make this bulk change every 6 months.

b. Bib levels that should be m instead of s (J. King)

SCRAP discussed if we should continue to use the TOM for book instead of serial for items that are properly cataloged as serials, such as Guinness Book of World Records. If the leader has the correct 's', holds get placed as item-level holds. In 2018 CAMM decided to change that 's' to 'm' so Polaris would see it as a monograph for the purpose of placing volume-level holds. However, the rest of the bib record remains serial. The display of the book TOM is confusing. The date below the TOM image is the first date that was published, not the current date. The date does not appear for serials it appears for book. J. King feels that placing item level holds is doable. The discussion will be brought to CAMM for the next meeting. R. Fischer will make sure it is clearly described on the Wiki.

5. Encoding levels of records and import profiles (B. Peterson)

B. Peterson has noticed that after he imports records, it will get overlaid by vendor cataloged (CLS) records if the encoding level is higher than the record that he edited. Changing an encoding level to I or blank stops this from happening. Libraries that import vendor cataloged records use import profiles that overlay duplicates if the encoding level is higher than the existing record. This can be problematic, because not all libraries that use CLS review their final records before importing them. The Wiki does not specify an encoding level requirement. SCRAP discussed if the Wiki should include a requirement for encoding levels for final records or import profile settings. SCRAP reviewed the import profile settings and decided that there was no other option for altering settings. Those that do not want their final records to be overlaid will need to change the encoding level to I or blank. OCLC has changed the encoding level standards (level I will become obsolete). J. Lavalie's macro could be revised to include this, but not everyone uses the macro. R. Fischer will present on the topic at the next CAMM meeting.

6. Does the L still need to be removed from the Lexile code in Polaris? (R. Fischer/B. Peterson)

The L for lexile does not affect the facets in the PAC. SCRAP discussed how the Wiki page needs to be edited. R. Fischer will remove reference to deleting L, but the \$b still needs to be present.

7. Creating guidelines for merging duplicates.

H. Scherer recommends the creation of guidelines for merging duplicates. This could be helpful for new member libraries. R. Fischer will work on improving the documentation on merging duplicates and draft a page for the Wiki. It will include guidelines on ISBNs, formats, graphic novels that have issues concatenated, multivolume set records, special format notes, and OCLC numbers that are in records for different items.

8. What topics belong on the Catalog Wiki vs. other websites?

The Wiki should be for local practices and local interpretations. A document explaining the guidelines is not necessary. J. Lavalie has reviewed every page. A separate task force is not necessary, but others could review it and more pages can be added to the list to review. The Purpose does not need more details.

9. Suggested Wiki edits (John)

- a. http://www.ccslib.org/Catalogers/index.php/Category:Pages_under_review

SCRAP decided to schedule another meeting for November to review the Wiki pages that need to be reviewed. The date and time of the meeting will be decided via a poll.

10. Additional topics.

J. King posed the question: is the 945 OCLC DO NOT SET still needed? R. Fischer reported that the information on how to use it is accurate on the Wiki. It does not need to be added to on order records, only to local records. Bob is not currently using it for generating the files for OHM, but Virginia does use it when creating record sets for MARCIVE. R. Fischer plans to review the use of the 945 at the next CAMM and ACQ meetings. J. King asked for an explanation of Bob's criteria for setting holdings to be included at the next CAMM meeting. R. Fischer will plan to research if there is anything outside of Bob's criteria that gets holdings set that has the 945 field. This can be discussed further at the next meeting.