

Minutes

Technical Services Discussion Group

ALA Midwinter meetings, San Diego, CA

Sunday, Jan. 9, 2011

Hilton San Diego Bayfront, Aqua 306A

10:30 a.m.

Attendees: Laura Bedford (National Museum of American History); Susan Pyzynski (Houghton Library, Harvard); Margaret Nichols (Cornell); Jane Gillis (Yale); Deborah J. Leslie (Folger Shakespeare Library); Sarah Garegnani (Swank Motion Pictures); Emily Epstein (U. of Colorado, Denver); Miloche Kottman (U. of Kansas); Deborah De George (U. of Michigan); Eileen Heeran (UNC-Chapel Hill); Beth Kilmarx (Binghamton U.); Lessie Culmer-Nier (Drew U.); Barbara Albee (Indiana U.); Michelle Mascato (U. Akron); Kate Moriarty (Saint Louis U.); Jane Carpenter (UCLA Special Collections); Elizabeth Johnson (Indiana U.); Aislinn Sotelo (UC San Diego); Randal Brandt (UC Berkeley); Ellen Cordes (Lewis Walpole Library, Yale); Helice Koffler (U. of Washington); Nicole Bouche (U. of Virginia); Mark Greenberg (U. of South Florida); Ruth Hughes (Library Company of Philadelphia); Elaine Franco (UC Davis); Jessica O'Pray (Huntington Library); Larry Creider (New Mexico State); Elizabeth Robinson (Library of Congress); Joe Springer (Goshen College); Martha Conway (U. of Michigan); Francis Lapka (Yale Center for British Art); Christine Megowan (Loyola Marymount U.); Ann Myers (Southern Illinois University, Carbondale); Catherine Uecker (U. of Chicago); Jackie Dooley (OCLC Research); Lois Fischer Black (Lehigh U.); Becca Wiederhold (Backstage Library Works); Annie Copeland (Penn State); Ellen Ellickson (Yale); Any Badertscher (Kenyon College); Christine DeZelar-Tiedman (U. of Minnesota); Louis Reith (Georgetown)

I. Introductions

II. Discussion topic: Location of local notes – in bib records or holdings records?

While many libraries still put copy specific notes in the MARC 5XX fields (541, 561, 590, 500 with \$5) others are putting information about donors, provenance, collection name, location, housing, etc. into the holdings record for each copy. Some libraries are doing both as a hedge against possible loss of information in future conversions. The Folger Library, for instance, puts copy specific notes in the record but suppresses them in the full display; then they put the same information in holdings records so that it displays with the copy (using an 852 \$z following the shelfmark and location), and they have enabled keyword searching of holdings records. Libraries with many copies of one title have found the notes fields within the cataloging record to be sometimes confusing as they try and pair provenance notes with tracings. One library uses qualifiers in parens at the end of the 500 \$5. The proliferation of notes in bibliographic records can get even more complicated with multi-volume sets and bound-with items; some systems display the same record multiple times for each bound-with title in response to one search. System displays have implications for circulation and public services, and we have to be mindful of all these things in creating solutions. These local notes should be protected at all cost when fuller cataloging records are overlaid –so talk to your systems people!

III. WorldCat Local update

Jackie Dooley from OCLC Research gave an overview of OCLC's plan for handling local data in WorldCat Local, the work on which is being completed during this fiscal year. Local data will be merged with the master WorldCat record for certain defined fields (505, 511, 508, 520, 586, 655); local holdings provided by the institution will be stored in a MARC Holdings Format for other fields (506, 538, 541, 561, 562, 583, and others) so that local holdings information may be searched in WorldCat Local by the home institution; and an additional associated record will be created for fields that are not valid for a master record nor appropriate for a holdings record (examples include local genre terms, local subjects, tracings of all kinds in the 7XX fields) so that these terms can be searched in WCL by the local institution.

OCLC's Duplicate Detection and Resolution (*DDR*) software exempts pre-1800 records from being merged. OCLC encourages members to report duplicates for these materials. Randal Brandt and Elaine Franco regularly report pre-1801 duplicate records to OCLC and both said they do not re-check the records to see if OCLC has merged them.

Copeland said that the Bibliographic Standards Committee has discussed the DDR and is going to request further exemptions from machine merging and will post the proposal on dcrm-l.

IV. Discussion topic: Printed material in archival collections

Our final topic concerned the treatment of print materials that are part of archival collections: are they removed and cataloged separately or are they simply noted in the finding aid? Some archives remove printed materials and catalog them separately so that a curator will be able to locate titles in a catalog search and avoid buying duplicates. Perhaps discovery systems, like Endeca, might alleviate the need for this kind of activity in the future by searching finding aids as well. Other libraries make decisions based on shelving locations and workflow. Some leave materials in the same general area as the archival material but on a shelf; most put notes in the separately cataloged record linking the item to the archival collection, and creating a link to the finding aid. Several add holdings onto the print record in OCLC whether or not the item is retained in the archival collection or cataloged separately.

V. Announcements

The University of Minnesota-Twin Cities Campus Libraries has an opening for the position of head of Technical Services.

A hearty round of applause was given for the appointment of E.C. Schroeder (former rare book cataloger!) as Director, Beinecke Library, Yale University. It was also noted that there will be an opening later in the spring for Head of Technical Services at the Beinecke.

Please email suggestions for future MASC discussion topics to the co-conveners.