

Evergreen ILS Task Force Report

Task Force: Cataloging – preliminary report, May 26, 2011

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Summary:

The cataloging taskforce has met twice so far. At the first meeting, the group assigned two person teams to investigate broad cataloging functional areas.

Areas initially identified were

- Staff Permissions,
- Holdings Maintenance,
- MARC Record Import,
- MARC Editor,
- Tech Services/Statistical Reports, and
- Acquisitions to Cataloging Workflow

Staff permissions:

Evergreen has a complicated permissions matrix and understanding what permissions a user needs to do certain tasks is not clear. If I understand it correctly, there are currently not groups of permissions set up for a specific kind of user. The document we have from Shae Tetterton on the Evergreen mailing listserve is apparently a proposal. She says "We are still testing these groups out but I'm attaching the proposed list in case you would find it useful in this discussion." She divides catalogers into subsets, catalogers and cataloging supervisors, and all permissions are grantable at the depth of system or consortium level. This in contrast to permissions at circ, which can be granted at the "branch" level.

If a grouping permissions system such as Shae proposes is implemented here, every cataloger would be assigned either the "cataloger" or the "cataloging supervisor" set of permissions as determined by the system. At least in the proposed system by Shea, there is not an option for "Item adder" who cannot import or update MARC records. We feel it is very important to also have a minimal cataloging user with no access to the MARC records.

Also, given the way we function now, many libraries would need Cataloging, Acq.& Circ. permissions combined for one user to do the work they normally do now. We must be able to make our own mixes of permissions, going across functional modules, for specific types of users.

Holdings Maintenance:

Functionality here is similar to our current capabilities, but with different terminology, and a different record setup. There is confusion with terminology – item and copy, with some information in both the copy editor, and item status records, but other information in only one of these forms. Add in the volume record, and there will be much confusion in training. Templates should help workflow, but the initial setup will be labor intensive.

Call number prefixes will need to be addressed as a migration issue. How will Evergreen handle prefixes? Call number searching, for both LC and Dewey numbers should be implemented. The Shelf browser feature is not adequate, and is currently not functioning correctly in the test environment.

Location/Collection is another major terminology and migration table translation issue.

There are many circulation code questions to be answered. Loan periods, fine rates, etc. How will add/delete counts be kept?

See the Item Record info and issues document on the wiki for further comments specific to the Holdings Maintenance screens and functionality.

Importing MARC records

The basic workflow to add records to the catalog seems functional both through z39.50 and the OCLC Connexion client. However, certain listed features are not operating in the test environment and we have a few suggestions for improvement of the interfaces.

Listed Features not operating:

- Overlay feature from Connexion.

- “Record Collision” message that a new import has the same OCLC number is only working sporadically

Features which need enhancements:

- Batch load – allow more than 40 at a time.

- Z39.50 -- Other number searches for UPC and publisher number are used quite frequently now for media and should be added to the list of normal search options eliminating the need to do a “raw” and cumbersome PQN search.

Editing MARC Records

There are major deficiencies in MARC editing. The MARC screens have formatting issues, there is no warning to save changes before moving to another screen, there is no authority check functionality, there are not drop down menus of valid elements for the fixed fields. Errors in the MARC record field will translate into patron issues when field delimiters will not function as expected, when corrections thought to be made are not saved, and spelling errors and other mistakes made the record unusable in the catalog.

A series of questions specific to cataloging, such as which MARC fields are indexed for a “title” search is posted on the wiki: Record import issues and other issues.

Tech Services Reports:

The reports "module" is very complicated, with tables within tables, and table labels that don't seem to always match directly to a field in an item or patron record. If we can set up some basic templates, most of the info we need can be accessible. The Evergreen features list has specific reports listed. Are there already templates for these reports somewhere? We need an interface like Web Management reports for circulation statistics. A list of commonly run reports (both from web management and create list) is posted on the wiki: [Current list of Reports](#).

Right now the show stopper for cataloging reports seems to be that Item Status reports are not available.

Acquisitions to Catalog workflow

This is a work in progress

Questions:

Do order records and bibs display in OPAC?

Will information in an order record migrate to item record? (price, collection (a or j), etc.

Can you receive in Acq. and create items in one step?

Evergreen Changes or Enhancements Required for Effective Operation:

Nbr	Pri	Change Description
COL-AU-00117	1	System supports automatic authority processing, whereby records are authenticated and marked for further attention. Library may specify authority sources to authenticate against, including an external authority processing vendor and local authority files. Library may specify how records are overlaid during updating process. Library may specify rules for marking or highlighting records that meet or fail to meet certain criteria, e.g. records with unique headings, records with new headings, and records that match a 'see from' (4XX) or 'see also from' (5xx) reference in an authority record).
COL-CG-00136	2	List records with duplicate values, ISBN, LCCN, OCLC control number that may need to be merged.
COL-CG-00109	1	Update a group of item records based on user criteria. For example, update the status, shelving location, or local call number.
SYS-GF-00103	1	Ability to specify default value, data validation, automatic formatting, and required status for any field.
SYS-GF-00127	1	System provides a user-friendly interface for designing queries against all record types. Staff can select fields to query; select values from picklist of possible values; select regular expressions from drop-down menu, and use a full range of Boolean operators. Administrators control staff access to tables and fields.
SYS	1	Permission groups with a limited cataloger user
PAT	1	Call number searching separated by LC and Dewey
CAT	1	Batch loads of more than 40

