

MARCCat Subgroup: Use cases

At the MARCCat working group meeting 7/23 it was decided to document typical workflows for catalogers - experienced, less experienced cataloguers etc. The intention with this, is for the atCult team and the UX designers to learn more on how the FOLIO libraries catalogue MARC records (e.g. MARC21 but also other MARC-structured formats like danMARC2, PICA3/PICA+) in their existing systems today, and typical environments like OCLC, and Union Catalogues.

[Tiziana Possemato](#) and [Annalisa Di Sabato](#) are planning to do a demo of WeCat (MARCCat) at one of the upcoming MM-SIG meetings - e.g. August 1, 2018 (TBD). The demo would be quite similar to the demo at the MARCCat subgroup meeting - see link to the recording at the [meeting minutes](#).

All subgroup and MM-SIG members: please add any relevant use cases. In the table the documentation of the usecases have been categorized, but feel free to add many more categories. If a use case is already represented, then add your name and library, if you have exactly the same workflow process. Please feel free to add any additional details.

Any use cases that involve bringing records into FOLIO from an external MARC source will likely involve the FOLIO batch loader, which updates the central MARC storage, and then Inventory and MARCCat views being updated automatically. See Batch Loaders use cases at [Data Import Subgroup: Use Cases](#)

It might work well to add a link to a document with screen dumps.

| | Use case (brief) | Use case description | Primary Cat work environment in this use case | Region (US, Sweden, Germany, etc) | Submitted by | Notes | Link to document |
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| Experienced cataloger: | | | | | | | |
| 1 | original cataloging | Create bibliographic record in OCLC; verify/update/create authority records as needed & control headings in OCLC record; bring record into local system (would we bring into FOLIO via MarcCat or could we import directly into Inventory?); add /edit administrative data such as cataloging level, cataloger initials, cataloged date; create holdings/item records | OCLC | US | Laura Wright | <p>Also true for UChicago, Natascha Owens; Would the administrative data in use case description be added in MARCCat or in Inventory App?</p> <p>Would be helpful for atCult to have a demo from a library that does original cataloging in OCLC</p> <p>Also true for Lehigh.</p> <p>Loading external records into FOLIO can happen via batch loader. Do we need some sort of lightweight process to bring individual records from OCLC into MARCCat?</p> <p>Thanks for bringing up the one-by-one import into Folio in addition to batch import. It is an absolute necessity for Cornell's workflow. We also need to overlay existing Folio records with newly captured OCLC records. Sarah Ross</p> <p>Also true for UMass Ann Kardos</p> <p>Also true for Duke Jacquie Samples</p> | |
| | | Create bib record in MARCCat, including look-ups for agents and subjects to control headings. | MARCCat | US | Jason Kovari | <p>--Jason Kovari what is the source of the authority records? --Laura</p> <p>For us now, NAF/SAF records, locally housed. We buy and add /overlay all changes from a weekly service. We could consider changing to a look-up against the live NAF/SAF as long as it was seamlessly integrated with MARCCat--Sarah</p> | |
| | | <p>Create bib record in union database CBS; link authority records to the bib records, if authority record does not exist, create a record in the shared authority file (GND); create holdings/item records; push bib/holdings/item to local ILS using an online update mechanism</p> <p>Special case: journals and continuing resources: these resources are not catalogued in the union database; they are catalogued in the central journal database (ZDB) and automatically imported into the CBS afterwards</p> | CBS | Germany (GBV) | Felix Hemme | <p>When is the exact moment when this system interacts with FOLIO? What is the specific connection point? - Tiziana</p> | <p>https://docs.google.com/document/d/1A19t7REtcXoKA5JnXymvtck5SQAhtfO7lZk6bmFCw/edit#heading=h.7thnjnfr5dib</p> <p>continuing resources: https://docs.google.com/document/d/1A19t7REtcXoKA5JnXymvtck5SQAhtfO7lZk6bmFCw/edit#heading=h.vdk9n1367y4j</p> |

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| | | <p>Here's a what I believe to be a <i>typical cataloging workflow</i> for <i>Swedish university libraries</i>:</p> <p>All initial cataloging (bibliographic and holdings), original and copy, is done in the Swedish Union Catalog, LIBRIS, in a BIBFRAME2-based format.</p> <p>Bibliographic and holdings records, converted to MARC21, are then manually or automatically imported (via OAI-PMH or FTP) to the local catalog, where they are stored. Some libraries may want the ability to edit the bibliographic and holdings records in the local catalog, but this varies. If you do any local changes you would have to be able to protect certain MARC fields in future LIBRIS imports.</p> <p>Item records are added in the local catalog.</p> | LIBRIS (Swedish Union Catalog) | Sweden | Lisa Sjögren | | |
| 2 | original or copy cataloging, local notes needed for Special Collections | Same as above, except we would need to edit the record in MarcCat to add local notes (such as provenance) | OCLC, but MARCCat for local data | US | Laura Wright | <p>Also true for UChicago, Natascha Owens; same for UMass – all original and copy cataloging is done in OCLC and exported into the local system Ann Kardos</p> <p>Also true for Duke Jacquie Samples</p> | |
| 3 | original or copy cataloging, local edits to record | Aside from notes, sometimes changes or additions to bibliographic records are made locally (perhaps we might add a 246 locally and do not want to make that change in OCLC, for example) | MARCCat | US | Natascha Owens | <p>Same for UMass Ann Kardos</p> <p>Also true for Duke – Jacquie Samples</p> | |
| 4 | simple edits | Staff at any level (not just experienced catalogers) need to correct a typo in record (in this case no addition of a tag or subfield is necessary) | MARCCat | US | Natascha Owens | <p>At GBV even simple corrections on bib records are being done by cataloguing staff. E.g. typos could also occur in the original resource and be valid. This has to be checked by experienced staff. But this can certainly be adapted to the requirements of all users by permission management. Felix Hemme</p> <p>Also true at UMass and at the other Five Colleges—staff at any level would need to be able to edit records in MarcCat. We have many non-professional staff who work in the cataloguing records for many reasons Ann Kardos</p> | |
| 5 | merging authority records | Manually merge or link duplicate authorities as needed within FOLIO | MARCCat | US | Natascha Owens | | |
| Newly hired cataloger: | | | | | | | |
| 6 | See the MARC record at a glance | Like the "See Source Record" view off the Inventory. MARCCat view is too busy to be meaningful to a new cataloger. | Inventory Source Record? | US | Sarah Ross | Charlotte Whit : yes this is supported by Inventory | <p>Inventory:</p> <ul style="list-style-type: none"> * The MARC source record is accessed by clicking on the button 'View source record' in the detailed view of the Instance record * The display of the source record in the Bib storage would be like: https://drive.google.com/open?id=1xyOcdLcKqMQdbyjUAFnu-8GgJlm1QMs * The source record is read-only and the data displayed will depend on the record. |
| 7 | Granular rights management | Assignment of permissions for individual users or user groups | FOLIO Users /Permissions | Germany (GBV) | Felix Hemme | Also true for Duke Jacquie Samples | https://docs.google.com/document/d/1A19t7REtcXoKAS5JnXynvtck5SQAhfO7lZk6bmFCw/edit#heading=h.tdedb4h0lquv |
| 8 | | | | | @... | | |
| Copy cataloguing: | | | | | | | |
| 9 | Add a record to the libraries inventory | <p>Start a search in the central database CBS; verify the bib data (determine whether the manifestation is identical to the present one), add new elements and do corrections; create holdings/item records</p> <p>If no record is found in the GBV CBS, a new search will be started in external databases via Z39.50/SRU</p> | CBS | Germany (GBV, hbz?) | Felix Hemme | Hi Martina Tumulla , does this use case also apply to the hbz? - Yes, it does apply, but with different central database and tools. | https://docs.google.com/document/d/1A19t7REtcXoKAS5JnXynvtck5SQAhfO7lZk6bmFCw/edit#heading=h.emtbq9zc9wzt |

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| 10 | Clone a bibliographic record within app | Clone a bib record in MARCCat in order to create a new identical bib, then edit it | MARCCat | US | Natascha Owens | <p>Natascha Owens – I'm curious when this might be done? -Laura Wright, there are sometimes special circumstances (at least at UChicago) where we require multiple versions of the same bibliographic record because the holdings are very complex and we want them each attached to individual bib records -Natascha</p> <p>--At Cornell, this is a common way for a highly original bib record to start life. --Sarah Ross</p> <p>--At Duke this is done when the number of items exceeds our system's ability perform functions quickly enough Jacquie Samples</p> | |
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| 11 | | | | | @... | | |
| Other processes: | | | | | | | |
| 12 | outsourced authority control /record updates-- bibliographic | We send monthly files of records to a vendor who adds some fields (such as 33x) if needed and also matched access points in bib records with authority records. We then receive bib records back with updated fields and reports with unmatched access points. Records are reloaded. | External vendor, e. g. Backstage, Marcive | US | Laura Wright | Also true for Duke Jacquie Samples | |
| 13 | outsourced authority control /record updates-- authority | We receive quarterly files of authority records that correspond either to new (to our database) access points or changed access points. These files, when loaded, trigger an automatic authority control process that acts on our bibliographic records (locally) and updates access points, matching on 4xx and 1xx fields. Changes to access points would need to occur in MarCat. | External vendor, e. g. Backstage, Marcive | US | Laura Wright | <p>There is also a lot of manual searching, matching, and updating that has to be done based on reports of unmatched headings. This work would also need to be performed in MarCat.</p> <p>The above note is also true for Duke Jacquie Samples</p> | |
| 14 | Automatic mass import | Applies (mostly) to eBook/eJournal metadata from vendors/publishers; data is enriched and converted to PICA+ format; then eBook metadata is imported into the CBS, eJournal metadata into the central journal database (ZDB); Holdings and items are added either in ZDB or CBS. | External materials or records vendor | Germany (GBV) | Felix Hemme | After completing the FOLIO ERM app, the GOKb will also be used in GBV; we have not completely figured out yet, how the data flow will look like, Felix Hemme | |
| 45 | Mail- correspondence | Inform other libraries of major changes or ask questions about certain matters; our current cataloging software has a build-in mailbox service implemented; all libraries associated with this bib record and named as recipients can retrieve messages | ?? | Germany (GBV) | Felix Hemme | withdrawn, 08/06/18 | |
| 16 | Short bibs | Acquisitions staff, ILL staff and sometimes cataloging staff use a template with default tags which can be filled in by the staff person (should involve keying in only, no drop-down menus); these records are sometimes just a placeholder from which to hang and item (ILL) or as a placeholder until full copy is found or created (Acquisitions or Cataloging staff) | FOLIO Orders, or load from external materials vendor | US Germany (GBV) | Natascha Owens | <p>Perhaps this will happen in Inventory App?</p> <p>Since 2018 all GBV libraries are switching to catalogue ILL material, iPads etc. locally in the union database. These records are only visible to the library to which the data sets belong, Felix Hemme</p> <p>Inputting staff (acquisitions workers or catalogers) also need to be able clone from existing records as above-- Sarah Ross</p> | |
| 17 | Print record | Print a bib record, with or without MARC coding | FOLIO Inventory (view source record) or MARCCat | US Germany (GBV) | Natascha Owens | <p>Also true for GBV, Felix Hemme</p> <p>Also true for UC Boulder Laura Wright</p> <p>Also true for UMass Ann Kardos</p> | |
| 18 | Complete, current copy of the NAF in the MARCCat system? | Because Cornell performs most of its cataloging in Voyager, our Voyager system holds a complete, current copy of the NAF. (Of course we still need OCLC, but the local copy is what drives most of our cataloging and OPAC operations). | MARCCat? | US | Sarah Ross | | |
| 19 | Search against NAF and local files simultaneously | e.g., Search on Smith, John: see all the John Smiths authorized by NAF and all the John Smiths in local catalog, so that John Smiths assigned to the wrong identity can be adjusted in the local catalog | ?? | US | Sarah Ross | | |
| 20 | Mechanical catching of mistakes | For example, if there is a 1XX, change 245 1st indicator to 1. All systems have this, just want to know what MARCCat offers, if we can add suggestions here | MARCCat | US | Sarah Ross | | |
| 21 | Supply ISBD punctuation | Noticed that Annalisa's demo didn't use ISBD punctuation. Non-German libraries still need to supply it, maybe with some machine help. | MARCCat | US | Sarah Ross | Some libraries in Germany are also using ISBD for display purposes, Felix Hemme | |
| 22 | Validation | i saw "verification level" in a pull-down menu. How much is it verifying (name, name + \$c, \$d, \$q? name/title)? Which fields validate? | MARCCat | US | Sarah Ross | | |
| 23 | Different character sets | "Completely integrated with MARC21"--I saw Annalisa working with MARC-8 in the pull-down menu. We need MARC21 and Unicode as well (just checking) | MARCCat | US | Sarah Ross | Unicode + utf8 also needed in Germany, Felix Hemme | |
| 23a | CJK and other non-roman scripts | Need to carry and edit data in non-roman scripts. CJK, Thai, Hebrew, South Asian, etc. | MARCCat | US | Sarah Ross | Needs testing by area specialists | |

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| 24 | Transcription versus "heading" | The Mondadori example confused me. Is the system trying to make us regularize all our publisher statements to one fixed form? Or is this merely a shortcut to enter frequently-seen data? We still need the ability to transcribe. | MARCCat | US | Sarah Ross | Similarly, I was puzzled by Tiziana's example of putting an authorized access point, inverted, into a 245 \$c. | |
| 25 | "Title proper" | The American studies example gives a title proper and a statement of responsibility together in a box called "title proper." What happens to subtitles, part titles, parallel titles, parallel statements of responsibility, second and third titles by same or different authors? | MARCCat | US | Sarah Ross | | |
| 26 | Wide-ranging searches | In a title search, we don't want to limit to data from the 245; we want to be able to search title added entries and 830s in the same search. For example, a common error in my library is to catalog different bits of a title as a series, a serial, and as an individual monograph. (Italian works are particularly prone to this treatment!) I want to be able to catch all the titles at a glance, not have to guess at each MARC tag that might have been mistakenly used. | MARCCat | US | Sarah Ross | Agreement from UMass – we need to be able to search all titles, 245, 246, 830 in one "title" search Ann Kardos | |
| 27 | Tag Tables | Who controls the tag tables in FOLIO? We update our tag tables at least twice a year from the MARC21 updates, and we also have local tags. We want to be able to maintain our local and/or obsolete fields and we tend to want our national-level tags quickly. | MARCCat | US | Sarah Ross | | |
| 28 | Compatibility with OCLC operations, especially WorldShare and batchmerge. | Overlay bibs in part or in whole from OCLC notifications. If the OCLC master record changes, we have WorldShare set to tell us about specific changes we want. We need to be able to add specific fields to the MARCCat record in batch. For example, this is how we add FAST headings to records that started out with only LCSH, and how we add LCSH to records for which we only used FAST. | MARCCat | US | Sarah Ross | | |
| 29 | Copy blocks of fields from other records and paste onto new record | For example, working on a new edition, perhaps I want to copy a 246 and the 6XX block. Can I do that in MARCCat without going one-by-one? | MARCCat | US | Sarah Ross | Is there (or could we have) a duplicate record function? At UMass for this case, I would usually duplicate a record and then delete what I no longer need /change and update Ann Kardos Ann, I think you're talking about the same thing as what is called "cloning" a record above. I agree, we need it! Sarah Ross | |
| 30 | Ensuring data consistency | If a record is currently being edited, it should be locked for further processing; a notification message should be shown | MARCCat | Germany (GBV) | Felix Hemme | I would be interested in what others think about it. A different idea would be to enable simultaneous editing, as with google docs, for instance. This could become confusing --I agree, Felix. It's a (sort of) feature of the Voyager system—at least, you are notified if you save a record that somebody else is concurrently working on, Sarah Ross | |
| 31 | Versioning | Who did what to a bib, when. | MARCCat | US | Sarah Ross | Our systems developers have sold me on this idea. | |
| 32 | RDA Toolkit implementation | The RDA toolkit should be integrated into the metadata editor. Additional guidelines or documentations can be integrated a needed. | MARCCat | Germany (GBV) | Felix Hemme | I agree that it "should" be but gosh, RDA in Toolkit such a mess and only going to get worse. I question what the return on investment would be for the effort. Sarah Ross Agree with Sarah, I am not convinced that using RDA toolkit from Folio would be beneficial 😞 Ann Kardos | |
| 33 | Duplicate check; matching | When creating metadata manually, it should be configurable whether duplicate checking should take place and if so, which identifier should be used. This could be a system ID, a regional ID, or a bibliographic ID (at least ISBN, ISSN), or the barcode of a item. If a duplicate record is detected according to the configuration, a warning message should be displayed. | MARCCat, and perhaps Inventory | Germany (GBV) | Felix Hemme | (And the option to proceed to create the "duplicate," as machine matching will always be imperfect – Sarah Ross) | |
| 34 | Database maintenance: series vs monograph treatment | Checking series authority record for treatment attached to analytical monograph bib record. This is currently done with a click to retrieve related authorities. Copy "series title" to search as "serial" title. Update serial holdings. Move item record to serial holdings. Code monograph bib and holdings are "deleted" and "suppress" these records. | MARCCat | US | Mary S Alexander | Suppress is not part of the MARC record. | |
| 35 | Database maintenance: Changing owning library | Voyager has owning libraries (location and security/permissions). bib and other records assigned to incorrect owning library. Drop down allows correct owning library to be selected by operator with correct permissions. | Inventory | US | Mary S Alexander | Owning libraries is not part of the MARC record. | |
| 36 | | | | | | | |