Additional Documentation

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Sorting the reports by module

- Since we had figured out which report could answer by which module (see workingsheet tab "Count Cluster - Working Copy" column "module s involved for count") we could create subclusters that may result in different prototypes

<table>
<thead>
<tr>
<th>inventory</th>
<th>agreements (ERM)</th>
<th>inventory, orders</th>
<th>agreements, orders</th>
<th>(inventory and/or agreements) + orders</th>
<th>no module identified now</th>
</tr>
</thead>
<tbody>
<tr>
<td>REP-41(a); REP-44(1); REP-45; REP-46; REP-47; REP-48; REP-49(1); REP-50; REP-51; REP-52; REP-53(1); REP-54; REP-55; REP-63(1); REP-85; REP-229(a); REP-167</td>
<td>REP-65; REP-229(b)</td>
<td>REP-41(b); REP-42; REP-44; REP-44(2-3); REP-48(2-3); REP-49(2-3); REP-53(2-3); REP-53(2); REP-63(2); REP-64</td>
<td>REP-66; REP-67; REP-70</td>
<td>REP-58(2); REP-59(2); REP-59; REP-57; REP-231</td>
<td></td>
</tr>
</tbody>
</table>

Records structure

- Laura verified that if there are multiple copies of the same thing, there is only one bib. In Folio, we would have one instance with multiple holdings.
- Laura said holdings records must have Inventory records. Item records must have holdings records. There can be inventory records without holdings record, but it's just a possibility. Some possible uses Laura could think of: using to order things, e.g., ordering everything from a publisher (but maybe this should be containers which isn't implemented yet); when received would be cataloged separately. To keep instance for something no longer held. Laura said it sounded reasonable only to count titles that have holdings.
- Local Cornell (from JL in March): Withdrawing records is a sequential process that involves actions on separate record components (item, holdings, bib). Bib: if the whole title is being withdrawn (it’s gone and there are no copies) the BIB will be suppressed (BIB_MASTER.SUPPRESS_IN_OPAC = “Y”). At some point after that, it’s deleted entirely. MFHD: If the Bib record is still valid (that is, one copy still exists, but one or more copies are being withdrawn), the MFHD record for the withdrawn copy will be suppressed (MFHD_MASTER.SUPPRESS_IN_OPAC = “Y”). Also, you will often (not always) find a "x" note (saying "withdrawn") in the MFHD 852 field. The 852$x subfield is for staff notes, so it can contain any text! Also, you will "usually" not find an item record. I say "usually" because sometimes the item records aren’t deleted on suppressed MFHDs because of oversight/error/some other reason that I can’t guess. ITEM: Circ staff will often apply a “withdrawn” item status to an item record when it has been Lost or Missing for a given amount of time and has completed the search process. From that point, selectors are forwarded a list of item records that have the withdrawn status. At some point, the item record gets deleted but it can exist for quite some time with the “Withdrawn” status on it. In Folio, excluded Items and Instances will show under “DiscoverySuppress” as True.

ERM

- A suite of apps (organizations are part of Acquisitions)
- eholdings can come in through knowledgebases
- Nothing in ERM identifies serials as only being accessible through a database (i.e., not in full)
- Nothing right now identifies backfiles?
- Peter not sure if anything identifies formats in ERM. some packages have more than one. Perhaps through the holdings info?

Where resources are tracked

- Libraries will use the apps very differently. You don’t have to have title level info for e-resources in the Inventory; you may not even be using ERM or the Inventory. For example, right now Cornell only has titles CU is paying something for right now in the ERM. Over time, if the knowledge base is tracking OA tracking, will bring the titles into FOLIO ERM. Right now the ERM does not have any government documents (Laura said we process these as government documents, not as e-resources; they generally don’t cost anything; not in packages; generally in Inventory). Laura said there is no logical place to put OA materials. Maybe some resources only through the cataloging Source records? some will only be in non-
FOLIO applications like institutional repositories. Each institution will need to determine where its titles are tracked and report through all of those locations, avoiding duplication. As Peter noted, we don’t know best practices yet. Need to take stats into those consideration when deciding where to track different resources.

Record suppression

- Use “suppress from discovery”. Staff suppress” is only to be used in odd cases (like no longer have an item, but have a PO attached so can’t get rid of); “suppress from discovery” would also be set.

Getting only items cataloged (made ready for use) / Excluding PDA/DDA unpurchased items

- Use Instance status (not repeatable). There will be a set list of values (cataloged, uncataloged, batch loaded, temporary, other, not yet assigned). However, each institution will be able to remove values from it and add values to it. (The same is true for items – a set original list that people can modify as they want; may influence loan rules. Cornell's list of instance statuses in the CU sandbox? (have to get an account.).)
- Of the set list, at least those would represent cataloged: batch loaded, batch loaded (see also below).
- We asked Laura if there is anything that would allow us to exclude items that have not yet been purchased in PDA or DDA agreements (but that for which there are instance records in FOLIO). She said that maybe we can have an instance status of “pda unpurchased.”
- Laura says to add the status update date to get the date that status started? (3/13/20)

Record formats (from Laura Wright on 2/27/20 and 3/2/20)

- In general/what’s what:
  - Laura said that the RESOURCE TYPE and the FORMAT TYPE in the Inventory App are based on three fields from the bib record: 336 (Content type), 337 (Media type) and 338 (Carrier type). 336 is used for RESOURCE TYPE, and a combination of 337 and 338 are used for FORMAT TYPE (in that order). She said that in the LDP, these fields are called INSTANCE TYPE and INSTANCE FORMAT.
  - So Inventory resource type = LDP Instance type
  - And Inventory format type = LDP Instance format
  - She said that these fields were used rather than the coded fields because they were more consistently used across all FOLIO members.
  - 336 is: MARC 21 content type: “form of communication through which a work is expressed”. https://www.loc.gov/marc/bibliographic/bd336.html
  - 337 is: MARC 21 “media type”: “reflects the general type of intermediation device required to view, play, run, etc., the content of a resource.” https://www.loc.gov/marc/bibliographic/bd337.html
  - 338 is: MARC 21 “carrier type”: “reflects the format of the storage medium and housing of a carrier in combination with the media type (which indicates the intermediation device required to view, play, run, etc., the content of a resource).” https://www.loc.gov/marc/bibliographic/bd338.html
  - For items like umbrellas there will be no MARC record, just instance records that are not “cataloged.” (In Cornell’s Voyager, these are suppressed.)
- For Report 61: The report asks for any audio or visual digital item (physical or virtual). Using RDA content type, Laura got the following through apps/settings…:
  - The Instance types of interest would be: performed music; sounds; spoken word; 3-dimensional moving image; OR 2-dimensional moving image.
  - AND
  - The Format type/Instance format would be: audio disc; computer disc; computer online resource; OR video – videotdisc (need to see list to see if got text correct).
- How to define an ebook (2/27/20 Laura Wright):
  - Instance: Mode of issuance: from the default suggested terms (may also be defined locally) either multipart monograph or single unit (full list: integrating resource, multi-part monograph, serial, single unit, unspecified)
  - AND
  - Instance format: Computer- Online resource (may be broken up into Format Category and Format term)
- German speaking countries will use “Nature of content” in FOLIO (in MARC 6557). RDA (replaces AACR2). This is the list they came up with previously: https://docs.google.com/document/d/1gb5ZL3GmCyR9KqTQpmfYLZ5zFJ62RZ0u-B7ZWD4/edit?usp=sharing . Laura doesn’t know of any US libraries using it; but they could. Should be included in appropriate reports so can be used. Complete list: https://wiki.dnb.de/download/attachments/10604227/AH-007.pdf . I believe Laura said we have MARC fields for all this data, but from different spots.
- How to define an ejournal (2/27/20 Laura Wright):
  - See that for ebooks. But use “serial” and serial only for ejournals for mode of issuance. “Integrating resource” is used mostly for web pages and databases. Could make case that NYT would be cataloged as a serial or as an integrating resource. If a set thing, like the printed NYT, serial. If online, integrating resource.
  - “Unmediated” means anything you don’t need equipment to use. g., physical book or serial. Could use “not” something to get at it?
  - Item type: Material type, term; Material type, category; Material type, source: Item record format codes will be locally defined. Had a list that they all whittled down? https://docs.google.com/spreadsheets/d/1scR0I9yOQy-c_emTkJ3EO66l7XPRIkupPNuL_FIN/edit#gid=1928495227 ??
  - Laura says Statistical codes could be our new best friend. We should include this, because at least some institutions (like Chicago) are using this for various types of counts (e.g., ARL and serials maintenance (including way to tell if a serial is currently received or not)). The MM folks decided to have a statistical code for Instance, holdings and item records. Locally defined. In general, Laura noted that it would be good to get data out of local 9XX fields as many people that use them now will not be using MARC in the future — instead they will use the Inventory.
  - (3/13/20) Statistical codes should be added for the holdings records too. Print v.s e?
  - All statistical codes are repeatable.
  - Instance mode of issuance: how published on instance record vs. how received on holdings. “Integrating resources” mostly for webpages, databases. “multipart monographs” and “single unit” for ebooks. “Serial” for serials. Etc.

Instance notes (from 5XXes)

- Repeatable
- Should include; will need notes and note types (paired value?)
- (ignore option to staff only for reporting)
Subscriptions

(4/1/20): At least for physical, this information would be in Orders. The Holdings records indicate what we have. Receiving information is in the Orders app. Info needed: if current subscription; if subscription added or cancelled; last checked in.

Previously held

- Laura doesn’t think implemented yet. Will be a yes/no check box. (in the administrative data of the instance record)

Resources of interest?

- Is this the latest version of the Inventory Beta – Metadata Elements?: https://docs.google.com/spreadsheets/d/1RCzyXUASrK47wZqlFPbiFM0xrw8WnMCcm1tt17B37Vl/edit#gid=952741439 (ask Laura; maintained by Charlotte Whitt)
- Material type, term; Material type, category; Material type, source: Item record format codes will be locally defined. Had a list that they all whittled down? https://docs.google.com/spreadsheets/d/1acRQ09YoOy-c_emITk3EQ6k7jXPRRkUPPnUL-FgM/edit#gid=1928495227 ??
- Reporting SIG master spreadsheet: https://docs.google.com/spreadsheets/d/1svUM74Dkg4KvTXLzKZK_2k_SxeukX-87NnY8CaTrYQ/edit#gid=312878932
- LDP-QURY project: https://issues.folio.org/browse/LDPQURY-30?q=project%20%3D%20%22LDPQURY%22
- API Documentation: https://dev.folio.org/reference/api/
- Axel’s file: https://docs.google.com/spreadsheets/d/15KTHJ7H7P7x1CEX8yCA6tz0jZg44qEddGSL1ysnE/edit#gid=1459821778