Questions

- Licensed?
- Licensed under what terms?
- Data Migration - Axel
- Subscriptions?
- Adding general classification, language and geographic info from bib info?
- What defines added new? What defines withdrawn? Transferred?
- Counting things not represented through item records?
- Quick questions
- Open Access?
- It cost us something?
- Look at format identification info to see if can define
- How best to document how to pick specific formats needed?
- What defines rare items in general? Is it only locations?
- Other breakouts?
- Harder issues?
- Consortial database concerns for counting (see also Harder issues?)
- Data migration to FOLIO
- e-Holdings:

Licensed?

- Licensed; first licensed; will be licensed in coming year; unlimited access; limited access; acquisition method?; commercially sold
- Cancelled/Added during the year. Will see in ERM.
- Licenses: Defines what you can do with a resource. Agreements: Defines what is a resource.

Licensed under what terms?

- Perpetual? Backfile? OA? OA: Depends on how each institution will represent it to the public.
- Title only accessible through Database
- Text searchable
- Limited user seats

Data Migration - Axel

- How is the relationship between instance, holding and item meant to be?
  Will there be a best practice how to migrate your own storage into this datamodel? How are different kinds of units stored? (ex. a drawer full of microfilms)
- Might there be competitions between the types? holdings type vs mods of issuance; instances formats vs material type?

Subscriptions?

- currently subscribed; subscriptions added; subscriptions cancelled; last checked in?
- At least for physical titles, this information would be in Orders. (Inventory holdings records indicate what we have; receiving info is in the Orders app.)
- How would these be determined for e-resources? through the Agreements app? Also to Orders somehow?

Adding general classification, language and geographic info from bib info?

- I see in MARC format [https://www.loc.gov/marc/bibliographic/bd01x09x.html](https://www.loc.gov/marc/bibliographic/bd01x09x.html):
  - 041 Language code; in instance records; there is also a fixed field for language; 041 is repeatable and displays the full name of the language; Language is in the Instance record.
  - 043 Geographic area code (Laura says this is not in the Inventory)
  - 044 Country of publication (Laura says she has never seen this used; code used instead; see next line)
  - 008 position 15-17 = country of publication (not in Inventory?; also in the place of publication (MARC260 or 264), but won't be standardized – it's to be as transcribed from the piece; may just be city; place of publication is up to a 3 letter code (e.g., NYU is New York, USA)
  - 050 $a or "Classification" in Instance Library of Congress call number (see other classification schemes as well). Should use call number instead: Instance record can have classification data, but it will not always be there; it is repeatable, can have multiple types; in MARC has 2 subfields - |a=classification, |b=cutter or shelflist. There are no subfields in the call numbers in holdings in FOLIO. One could populate your instance records with bib 050 $a from your holdings records when loading records in from Voyager for example. At Cornell, there was a time when we actually stripped call number info from electronic bibs; we aren't ensuring they are there now, but we are not removing them any more.

What defines added new? What defines withdrawn? Transferred?

- This will be so library-specific. Date stamp on item record. Cornell bib-948-like statistics? In the Inventory, there is a statistics type for every record type. Possibly for item record creation, we could have a template that encourages a retrospective stat type if appropriate? U. of Chicago uses a stat code this way? Paired values: type of code (e.g. ACRL) and code itself (what count as). Will Cornell map 948 stats to that? Will need to decide; Laura created a code in the local sandbox? Maybe PO for those items that are paid for? Mainz is doing dummy purchase orders for gifts or group orders on one holdings? Withdrawals and transfers are the same. Noted it is currently difficult/impossible to get summary counts.
Counting things not represented through item records?

- Pieces of microforms.
- Linear/cubic feet of archival materials.
- Unbound serials (e.g., some libraries keep file of estimated number of volumes - as they are not bound)
- Unbarcoded rare items?
- Pieces: Item record piece count. Physical description if item is complete and we own all (300|a). Statistical codes would never have counts. Put in note? Very institution specific.

Quick questions

- Why do we need the 5XX notes again? Laura said notes that something is OA might be there. Not consistent. (see separate entry too)
- Why again are some people creating item records for eresources? It has to do with how information displays in the OPAC.

Open Access?

- Laura noted there is no standard way to do OA naturally. Should be set so that it can be used in discovery: some users only want OA materials. No set place to look for. Could be in 5XX notes - but not consistently. There could possibly be something that indicates it in the 856 on teh bib in the URL. May not be noted at all. OA is a publishing model; cataloging records are provider neutral. Could be different versions. Holdings level? May be defined in EDS's index?

It cost us something?

- Specific types of costs? replacement, binding costs, ILL, software, maintenance, backfield, APCs

Look at format identification info to see if can define

- physical vs. virtual (local CU practice: location code - serv,remo)
- digital or not digital
- general bibliographic formats (eg., media)
- very specific formats (e.g., newspaper, database, journals vs. serials?)
- serial (see instance mode of issuance)
- microform
- served remotely or locally?

How best to document how to pick specific formats needed?

What defines rare items in general? Is it only locations?

- Can we ensure all rare locations have the world "rare" or something like it in them? Makes sense for each institution to plan to do so. This is the only way Laura can think of to identify all rare items easily. At Cornell, for locations, they started by asking which locations we could get rid of because they are not used any more, and how we could make consistent.

Other breakouts?

- government documents (008 has values for different types of gov docs; 086 for federal US docs only)
- digital digitized and served locally; housed in institutional repository; when digitized; (URLS or local bib fields might have project info?)
- digitized as part of a project (e.g., HT); print that was digitized to be part of HT; previously held? Local Cornell for Google project (JL March): There is a 903 field of the BIB record that says "google" for at least a subset of these records. See for example https://newcatalog.library.cornell.edu/catalog/5089795/librarian_view
- obligatory copies
- retention commitment? (could do at bib, holdings or item level; at Laura's previous institution they did it both at the bib and the item level; use bib to display to users and sharing data to Goldrush (comparison tool); at item level, because you may have more than one copy. Laura thinks it should definitely be at the item level at least so we know not to withdraw this copy. It is an action note. MARC 853. Also bib 008? Could be a statistical code, but not ideal.
- perpetually owned vs. leased
- titles we have partial access to full-text, only through databases
- where to get specific notes: left by decedents; provenance; precious binding; copy notes; dedications; inscriptions (up to each institution to decide; on all records possible; specific notes; items record for special binding, provenance?); could also use tags -- but not yet implemented in Inventory and how consistent would people be: it is a separate application, but shows up when enabled; each institution defines and who can use; like putting a colored sticky on something; less reliable than statistical codes; holdings and instance notes most reliable?
- how will items that should not be counted as part of collections be coded for exclusion (e.g., equipment, personal copies on reserves, collections not owned by library but cataloged by library in catalog)
- text searchable (nothing Laura or Peter could think of)
- item purchased at campus store

Harder issues?

- E-resource duplication?
- Copies in different formats attached to same instance record.
• Not counting earlier titles in title changes (is this even possible?? requested by ACRL)

**Consortial database concerns for counting (see also Harder issues?)**

• Many German universities have shared catalogs. Need to keep in mind that a bib alone does not equal ownership; for those with shared catalogs it’s a bib plus at least one holdings record. Need also to consider that subscriptions of different formats may be linked to the same instance record. Will the holdings data allow us to determine different formats? E.g., may not be able to count on call numbers to identify microforms (even if it normally would, there may be transfers in from other universities with different call number types). Some libraries without shared catalogs will also have some records with multiple formats attached to one instance record.

**Data migration to FOLIO**

• With Peter: how will 948 |f data be transferred?

**e-Holdings:**

• From EBSCO

Next