

SERIALS ADVISORY GROUP  
MINUTES OF THE MEETING  
JUNE 17, 1993

Present were: Barbara Heath, Diane Paldan, Chris Chamness, Betty Wiggin, Patrice Merritt, Betty Podzorski and Charlene Wecker.

1. The SAG welcomed Betty Podzorski (Law Library) back from an extended absence.

2. Discussion of CheckMARC

All SAG members had attended the demonstration on CheckMARC on Tuesday, June 15, offered by the Systems Office. Beth Warner of U of M presented a three hour demonstration of CheckMARC for DALNET institutions. SAG discussion included the following:

Notis Libraries are not required to convert to CheckMARC. Some DALNET libraries may choose to convert; others may not. The SAG was reminded that receipt lines from CheckMARC will display differently in LUIS than receipt lines from the OPR. If some libraries do convert and others do not, there will be variations in screen appearance.

U of M is not implementing CheckMARC at this time. Barbara Heath will speak with U of M and ask the reasons for their decision.

Central Michigan and Western Michigan are converting. Vanderbilt University is also converting and Barbara Heath will talk with a colleague at Vanderbilt to see how their conversion is progressing.

The SAG was very concerned about the creation of caption pattern records and how they would be created for all currently received serial titles. Would the conversion be completed in one large project similar to the Kardex conversion or would patterns be created upon receipt of title? Barbara Heath indicated that it would have to be completed as one major project. Two terminals side by side would most likely be required for the conversion. In order to create caption pattern records, the copy holdings, the MARC holdings records (for "Shelved As") and the OPR would all have to be utilized. A conversion from the KARDEX to the LSER was perceived as being easier than converting from the OPR to the LSER.

The predictive elements of a caption pattern record cannot be changed once it is entered. If created erroneously, the pattern record must be deleted; this also deletes receipt of issues entered under this pattern. When the pattern changes, a new record needs to be created.

NOTIS indicates that 5% of serial titles cannot be checked in using LSER. The SAG agreed that a more realistic percentage for WSU might be 10%. CheckMARC would not work easily for checking in cumulations, microforms, combined issues, weeklies, dailies, and in the Law Library, loose-leaves and Shepard's. These titles would continue to be checked on the OPR requiring staff knowledge of two systems for check-in.

The SAG discussed the work flow of bindery processing under CheckMARC. Because the System is not integrated with other acquisitions functions and each receipt of a bibliographic item displays in LUIS System, all issues of a title must be keyed with a "B" when binding. (Twelve issues, twelve B's must be keyed.) Diane Paldan suggested that work flow would have to be rearranged in bindery processing.

CheckMARC produces reports in addition to the EARL report. These reports contains information on items missing, the order in which items were checked in, etc. This list must be handled daily as the information on it does not cumulate. The need to perform this daily task would change work flow patterns.

Patrice Merritt asked if FAXON or EBSCO were creating caption pattern databases for their customers. Charlene Wecker responded that FAXON had discontinued working on a database that they had begun to create. No information was available regarding EBSCO.

Barbara Heath will be distributing the recommendations from the SAG regarding implementation of CheckMARC at this time.

### 3. Serials Lists

Diane Paldan had inquired at the last SAG meeting regarding lists that could be made available from the Systems Office for collection management of serials.

Secondly, Diane asked if there was a way we could prioritize serials on the actual records. This would be extremely helpful for collection management particularly as serial budgets may need to be cut and titles must be considered on an individual basis. Charlene stated that this indeed could be added to the record. The SAG commented that for Library System uniformity and the ability to retrieve this data, the Systems Office should offer guidelines indicating how and where that notation should be located.

SAG Recommendation: The SAG will compile a list of the content and sorting capability they would like to see in a serials report and present it to the Unit Heads. Diane and Patrice will compile this list and offer it in a proper format for presentation to the Systems Office.

#### 4. Miscellaneous

Barbara Heath reported that the cataloguers could add ISSN's to records in the 022 field, if desired by units. Serials units should send request for this to Barbara Heath accompanied by a photocopy of the source from where the ISSN was cited.

Diane reported that the bindery contract is moving forward very slowly but that a commitment should be reached by the end of the month. The current schedule runs through June but Diane will be issuing an extension to that schedule of bindery shipment dates.

Bindery budgets and the percentages spent are in line with budget projections. Efforts to consolidate binding seem to be having a positive effect on costs but less volume output due to the lack of part time help is also a contributing factor. P/K and SEL both indicated that bindery processing will increase over the summer.

Charlene reminded the SAG that on July 17, function keys will be operational in the OPAC for patron use. The hook to holdings feature will also be operational.

The SAG complimented Beth Warner on her presentation of CheckMARC.

Next meeting of the SAG is scheduled for: Thursday, July 29, 1993, at 9:30 A.M. in the Training Room. Meeting adjourned at 11:00 A.M.

Respectfully submitted,

*PATRICE MERRITT*  
Patrice Merritt