

Marmot Union Cataloging Committee
 Wednesday, January 23, 2019
 Minutes

X	Jamie Walker [Chair]	CMU		Tami Hicks, Stacy Contreras	Lake Co
X	Mary Walsh	Adams State	X	Betsey Dick	Mesa Co
	Gail Owens	Basalt	X	Shelly Fratzke	SD#51
X	Nancy Trimm, Robin Trehaeven, Cindy Young	Bemis	X	Wendi Weinstein	Pine River
X	Nina Darlington	Bud Werner	X	Carol McArdell	Pitkin
X	Kim Grindrod, Jan Quick	Buena Vista		Debbie Barnes	Rampart
X	Oliver Schulz	CCU		Becky Nelson, Kristin Trombo	Salida
X	Amy Currier	CMC Glenwood		Sarah Nordholm	Summit Co
	Liz Miller	CMC Leadville		Jo Norris	Vail
	Jonathan Beam	CMC Steamboat		Nicole Becwar	WSCU
X	Diane Levin, Jolanda Durbin	Eagle Valley	X	Amy Sieving, Alison Farnham	Wilkinson
X	Selene Gardner	Englewood	X	Tammy Poquette	Marmot
X	Lara Aase, Tyler Dunn	FLC	X	Lloyd Chittenden	Marmot
X	Amy Shipley	Garfield Co		Brandon Cole	Marmot
X	Tallie Gray	Grand Co		Adam Murray	Marmot
	Jennifer Hillebrandt	Gunnison Co			

Announcements

- Duplicate checking on new records turned back on

Completed action items

	Report
Check with ASC about deleting old Statistics Results files	After checking with ASC, Lloyd deleted Statistics Results files that were more than 1.5 years old. Some people are still using this function and want to be able to refer back.
Develop duplicate checker for 020	Duplicate checkers for ISBN and 020a are both working.
Ask Discovery Committee about indexing of 020 z in Pika: YouTrack ticket D-2534	Discovery Committee discussed how to deal with the 020z in Pika. The conclusion was that Pika could have two ISBN indexes as Sierra does now. They want to keep a broad ISBN searching function, but Pika also needs a narrower version for things like getting the correct cover art from Syndetics. There is now a YouTrack ticket for this change.
Find out if III can stop the automatic truncation on Bib Util number searches in Staff Module. If not, open an Idea Lab proposal.	Idea Lab proposal started.

Discussion Topics

- New draft Union Catalog Policy document
 - This board policy document has not been updated in many years. Lloyd drafted a new version which we consider and edit.
 - Here is the edited version: https://docs.google.com/document/d/1S_xv5BqP_22GGBMu_fsUg1ZmoechoPxYOWSILASPGVc/edit?usp=sharing
 - The UCC approves the edited version to forward to the Board of Trustees for approval. ***Action Item.**
- We veer off into a conversation about Z39.50 cataloging.
 - All the 001 fields in records loaded by Z39.50 have a 'z' prefix to avoid bad overlays.
 - Since Lake County has joined and is primarily cataloging with Z39.50, the number of these records is growing faster than previously.
 - If people find these records with OCoLC in the 003, they are almost certainly good OCLC records. It should be safe to remove the prefix and attach your items.
 - Lloyd will start regularly running a list of records with a 'z' prefix and OCoLC in the 003 and removing the prefix. This will cause any duplicates to pop up in Headings Reports and the new Tableau duplicate checker.

- Update on ISBN duplicate checker
 - There are now three Tableau based duplicate checkers. They are all working. The duplicates committee needs to work on developing documentation and best practices for using them.
 - Shelly wonders if it would be possible to create something like a view that would allow you to exclude matches for everyone. It would be like a second level of view where matches could be excluded for all users, then people could still make location limits within that view.
 - ***Action Item**, Lloyd will discuss this second level view idea with Brandon.
- Volume fields on DVD sets
 - The problem we are having is that when a single library fills in the volume field in an item record it unnecessarily triggers an item level hold. Sometimes this is just a mistake. We can work on finding those and training people not to do that.
 - However, sometimes different libraries actually intend to break up a DVD set and circulate parts while another wants to circulate whole set as a single unit. When one library breaks up a set they have to add a volume field, which triggers item level holds for everyone, even those who keep the set together.
 - Some libraries have to break up sets because they have special packaging such as locking cases that can only hold so many discs.
 - Results of survey
 - Lloyd created a survey on Google Forms: <https://goo.gl/forms/KtOFZIGtK7JIOmmB2>
 - Based on the survey results, there is nothing even close to consensus about what to do here. A slight majority supported requiring everyone to circulate all DVD sets as whole sets without breaking them up. However, almost as many people strongly object to that idea, and some people have physical packaging issues that would make it impossible.
 - Tableau utility?
 - The Duplicates Committee had the idea that maybe Brandon could use Tableau to create a utility that would find bibs where one library had filled in the volume field and another had not. Then that list could be limited by location. That would allow each library to find those cases where they may have created a problem, and fix it, or contact the library that did create a problem.
 - Lloyd suggests that we could have everyone look at the records that this utility finds and make sure they all agree with either having volumes or not.
 - Some people object that they don't want to go back to add volume information when they have an entire set because someone else broke up the set.
 - Best practice flow chart?
 - Jamie had the idea that it would be valuable to develop a flow chart to explain the best way to use the volume field in item records.
 - Nina mentions that in the past we had a lot of problems with different sites using different records. Some would use single records and others would use analytical records for the same thing. It created a lot of problems for staff and patrons. People would try to reuse records with the same BIB UTIL numbers, then the system would create more duplicates each time someone else would download a record. She remembers that we developed a policy where everyone would try to use single records and circulate sets as single units. We seem to have not kept up that policy.
 - Lloyd asks what should be the policy when someone finds an error where a different library has clearly used the volume field incorrectly. Should libraries be allowed to fix those if they are clearly in error? Should Marmot fix them? Should we contact the library that created the problem?
 - In this situation people don't want other libraries changing their item records. They want to be contacted to fix the mistake.
 - If you need to include volume information, but you can't use the volume field, you would put it in subfield je in the call number. Then it will display without triggering item level holds for everyone.
 - Amy suggests we need better Marmot training for new people. We get new members and old members get new people. In both cases you can have people who don't know how we do things in Marmot. Dealing with the volume field is one situation that could be helped with training.
 - Jamie suggests that we could set up a system where new people can't get permissions in the system until they have completed some training. Nina likes that idea. Shelly thinks it is asking too much.
 - Many people like the idea of developing Marmot cataloging training, even if we don't make it a requirement.

- Training would cover how to add items, to you own bibs, and to other people’s bibs, particularly the volume field.
- Amy thinks it should cover copy numbers, ICODEs and ITYPEs.
- How copy numbers behave depends on people’s settings.
- Nina wants a description of each item field, how it is used in Marmot, what are the options for how members can use it.
- Jamie points out that we could have basic training to cover critical issues, the more in-depth materials could get into more detail.
- Someone on chat suggests we could create a subcommittee.
- Lloyd and Tammy could work on it.
- Tammy points out that when she creates documentation she always has members check through it. A subcommittee could review that documentation.
- Lloyd will try to write up a policy that we can adopt for the volume issue. ***Action Item.**
- Lloyd and Tammy will start on developing cataloging training materials. ***Action Item.**
- No A/C in shared records, maybe don’t protect this field?
 - Jamie has noticed that there are good OCLC records in the system that have a No A.C. note preventing them from getting authority control. He wants those to get authority control if CMU is attached to them.
 - We investigate what those records might be.
 - It looks like many of them are discovery records for the Demand Driven Acquisitions system at Fort Lewis. Lloyd remembers that Martha did not want to send discovery records to authority control because most of them were for books that they would never actually buy. Jamie says that once someone else attaches to that bib, then it needs authority control.
 - Lloyd suggests that if the 958 field were not protected, then a new load from OCLC would remove the note. However, people could easily attach to that without realizing they are not getting control.
 - We create a list of all the OCLC records that have a No A.C. note. We find that most of them are Fort Lewis DDA discovery records.
 - Lloyd will contact FLC to see if they still want to prevent these from going to authority control. He will work with them to develop a process for DDA records that will work for CMU. ***Action Item.**
- WHOHADIT field
 - This is a field that had a function in Millennium but no longer works in Sierra. In Millennium it would cause the system to retain the last patron information. Without it the information would not be kept. Some members did not want to retain the last patron information for privacy reasons. In Sierra this field is still there and some people thought it was still functioning, but it does not appear to actually have any effect. All records in Sierra retain data about one last patron regardless. Lloyd asked the UCC email list if there were any libraries that did not want to retain that information. Nobody responded that they did not want to keep that information. Nobody in this meeting says they don’t want to keep the information either.
 - This probably lives in many people’s templates, so they will continue to create these.
 - Shelly says that it is in the 949 control field coming from her vendors. She would like Lloyd to change the loaders to ignore this in 949 fields. Lloyd will make a new ***Action Item** to make this change.
 - Everyone is welcome to remove it from item records and templates that create item records.
- Nina wants to remind people that the Statistics function is not working in Sierra. It brings up information from deleted records and you can’t tell which information is from current records and which is from deleted records. This is something that we think is fixed in newer versions of Sierra. This does not happen in Create Lists, Circulation Activity Reports, Web Management Reports, Tableau. It is only Statistics in Sierra.

New action items

Action	Responsible parties
Send updated Union Cataloging Policy to Adam for Board approval	Lloyd
Discuss Shelly’s two level view idea for duplicate checker	Lloyd and Brandon
Write up policy for using item volume fields	Lloyd
Develop cataloging training materials	Tammy and Lloyd
Contact FLC about authority control for their DDA records.	Lloyd
Update loaders to exclude WHOHADIT from 949 control fields	Lloyd

Ongoing action items

Action	Responsible parties
Figure out how to copy Garfield birthdates to variable field	Lloyd
New export profile for 538 field for CMU last copy project	Lloyd/Jamie
Grouping meeting with R&D	Duplicates Committee/R&D
Develop procedures and documentation for 001 Duplicate Checker	Duplicates Team
Revise Marmot Cataloging Standards document for local fields based on discussion	Lloyd
Develop new Marcive process since we can't get the large batch discount	Lloyd
Find out what is Repeatable Volume field mentioned in Manual	Lloyd

Duplicates Sub-committee meeting: February 13, 9-10 MT

Next UCC meeting: February 27, 9-11 am MT