

Marmot Union Cataloging Committee
Wednesday, February 27, 2019
Minutes

X	Jamie Walker [Chair]	CMU	X	Tami Hicks, Stacy Contreras	Lake Co
X	Mary Walsh	Adams State		Betsey Dick	Mesa Co
	Gail Owens	Basalt	X	Shelly Fratzke	SD#51
X	Robin Trehaeven, Juliana Van Pelt, Carol Harvey, 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	X	Jo Norris	Vail
	Jonathan Beam	CMC Steamboat		Nicole Becwar	WSCU
X	Diane Levin, Jolanda Durbin	Eagle Valley		Amy Sieving, Alison Farnham	Wilkinson
X	Selene Gardner	Englewood	X	Tammy Poquette	Marmot
X	Lara Aase, Tyler Dunn	FLC	X	Lloyd Chittenden	Marmot
	Amy Shipley	Garfield Co		Brandon Cole	Marmot
	Tallie Gray	Grand Co		Adam Murray	Marmot
	Jennifer Hillebrandt	Gunnison Co			

Announcements

- There are currently scoping problems in Sierra. III did not create the new scope for Bemis until yesterday, which was go-live day for Bemis. We asked III to do this weeks ago, but they didn't do anything until we escalated the issue yesterday. The effect of this is that many items will be out of everyone's scope until the rescoping is done. We hope this will be finished by tomorrow morning, but we can't be sure. We don't think this will have any effect on Pika.
 - The question comes up what scoping is. Scoping is the system in Sierra that keeps different library's materials separate so that people can't mess up or delete other library's items. Our standard policy now is that almost all logins will be scoped, but each site can have an unscoped login that they can use for deduping and to fix scoping problems.
- Bemis go-live was yesterday.
- We have a discussion of the poor service we get from III and the apparently dismal numbers of libraries migrating to Sierra. Lloyd mentions that Adam has us exploring the new open source library system Folio. We have a discussion of the opportunities and problems that Folio presents.

Completed action items

Revise Marmot Cataloging Standards document for local fields based on discussion	A new draft is completed and we will discuss later in this meeting.
Develop new Marcive process since we can't get the large batch discount	New monthly process is ready to test at the beginning of March.
Find out what is Repeatable Volume field mentioned in Manual	III confirmed that item volume fields are repeatable, but could give no examples of why you might want to do this.
Investigate Shelly's idea for a second level view for the duplicate checker	This was discussed in Duplicates committee. We will discuss later in this meeting
Fix loaders so they ignore WHOHADIT information in 949 control fields	This has been done. All the loaders now ignore this field in incoming 949 fields.
Send new Union Catalog Policy to Adam for Board approval	This has been done, and the new policy will be on the next Board agenda.

Discussion Topics

- New draft of Marmot Cataloging Standards document.
 - Lloyd has completed another draft of the Marmot Cataloging Standards document. Discussion ensues.
 - We have a lot of discussion about how to handle DVD sets where some people have all the discs on a single item and others break them up into different items.

- Lloyd points out that we have the advantage that we have control of Pika. Maybe we could have a discussion with Software Development about how this might be solved at the Pika level, since there does not seem to be any single solution we can agree to in Sierra.
- Jamie points to the way we are using item field group tag 'g' to send Pika special information about how to deal with electronic resources. Maybe we could do something like that to signal Pika how to deal with these DVDs.
- Maybe we could have a linking number to tell Pika that two DVDs are the same thing.
- Or everything could be on one bib record, then there would be a code in the item record to tell Pika whether an item represented a complete set or not.
- Maybe Pika could be programmed to recognize this situation and respond to it. It could pop up a dialog box asking the patron if they want to request a complete set or particular volumes, then it could place a bib level hold or item level hold depending on the response.
- Nina points out that this may be a very small group of materials that we are talking about.
- Lloyd says that if we create this ability in Pika it could be applied in other situations.
- This is primarily about DVDs of TV series. They are very popular, so even if it isn't a large part of our collection, they are a large part of our circulation numbers.
- Pika's programming backlog is very large, but this could have a benefit to all members, so we could argue that it should be a high priority.
- Nina asks if there is a new problem that has appeared to bring this up. She says that what we have been doing is actually working fine.
- Lloyd says that this came up because he is trying to revise the cataloging document, but there may not actually be a large problem. We do need a document that explains our expectations to new members.
- Shelly suggests we do a survey to find out what problems might exist.
- Nobody reports that there are complaints from patrons now.
- Jamie suggests that the Duplicates Committee could meet with Software Development to see what we might do with this. **← Action Item.**
- Jo points out that this started years ago because Vail was using the volume field which forced everyone to use item level holds even though Vail's DVDs were not holdable at all. We agree that any library who's DVDs are not holdable should not use the volume field.
- Shelly says this also applies to print items that are not holdable. That should be mentioned as well.
- This also applies to serials and travel books. Some people are using serial records and some monograph records for the same travel book.
- Nina suggests we collect information from everyone about what we are doing about these so we can figure out what to tell new people about what they should do.
- Lloyd agrees that a survey is a good idea. We can ask about books and DVDs. What are people putting in volume fields? What is going on the spine label? Are things holdable? Serial record vs monographic record? Complete sets vs parts? **Action Item:** Duplicates committee will develop this questionnaire.
- Robin says that Bemis loaded all records without volume fields. They need to figure out what to move to volumes and what to leave in call numbers.
- The cataloging standards document is still not complete. We will bring it back again next month.
- **Update on duplicate checker.**
 - The Duplicates Team had more discussions on how to improve the duplicate checker. We realized that it would work better if we had a single Tableau login for all dedupers. That would allow them to all share a single view in which pairs of dups could be excluded for everyone. **Action Item:** Brandon will create this new login and the duplicates team will work on the procedures for using this process.
- **Double 001 fields from Bemis load.**
 - The Bemis records were loaded with a load profile that inserted their 001 number in to every overlaid record. This allowed us to add good OCLC numbers to an estimated 20,000 bib records that didn't have them. However it created a problem of records with 2 control numbers. Many of them were easy to fix. Duplicate fields were removed. Numbers with prefixes were removed, leaving the OCLC number. Lloyd checked the remaining 001 numbers against OCLC to find numbers that were not in OCLC. These were removed. This leaves about 5,000 bib records that have two 001 numbers and both of them are valid in OCLC. These will require fixing manually. They will appear in the deduping tool and headings reports because Lloyd loaded these records again to be sure the Bemis items would be on correct records. Many of them are actually 019 duplicates, however that usually

- requires checking OCLC to find if they have been merged there. If they have been merged at OCLC, then we can merge ours.
 - Mostly this is a deduping problem.
 - When you find these, you can search both numbers in OCLC to see if they have been merged there.
 - If they are not merged at OCLC, but you think they should be, you can email bibchange@oclc.org and recommend they be merged.
 - Remember that the OCLC numbers are important to retain if they have not been merged at OCLC because they are valuable for ILL.
 - The problem records are in review file 79.
- 024 field in the vendor load profile.
 - Lloyd had the question of whether the 024 field creates the possibility of overlaying wrong versions of things because records have multiple UPC numbers the same way they have multiple ISBNs.
 - Nobody in this meeting has seen this problem.
 - We won't worry about it unless it becomes a problem.

New Action Items

Action	Responsible Parties
Create another revision of the Cataloging Standards Document to consider	Lloyd
Meet with SD department about how Pika deals with sets vs. parts	Duplicates Committee
Develop survey of what everyone is doing with sets and part records	Duplicates Committee
Set up a Tableau login specifically for deduping	Brandon

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
Develop cataloging training materials	Tammy/Lloyd
Develop flow chart for how to use the volume field	Lloyd
Figure out a process for authority control for FLC's discovery records	Lloyd
Investigate a new Tableau utility for finding bad volume field use	Lloyd/Brandon

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

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