

Catamount Cataloging Group
Minutes DRAFT
March 9, 2016
Rutland Free Library
9:00 am

Present: Jill Chase (Waterbury), Janet Clapp (Rutland), Leah Gessner (Guilford), Catherine Goldsmith (Starksboro), Gizelle Guyette (Morrisville), Holly Hall (Deborah Rawson Library, Jericho), Deb Kesler (Deborah Rawson Library, Jericho), Mary Lemieux (Morrisville), Leslie Markey (Brooks, Brattleboro), Lynne Fonteneau McCann (Bennington), Russ Moore (Springfield), Constance Murphy (Deborah Rawson Library, Jericho), June Osowski (Rutland), Wendy Sharkey (Bennington), Greg Tisher via GoToMeeting (Royalton), Jill Tofferi (Fletcher, Ludlow), Roberta Tracy (Ainsworth Public Library, Williamstown)

The purpose of today's meeting is to help ensure that everyone cataloging in the Catamount consortium is on the same page. This should make things easier for us and our patrons.

Handout and resources: Wendy provided a handout including the cataloging flow chart, samples of records (good and incomplete), handbook headings, and cataloging resources. Please note the resources page refers to Koha manual 3.10 but we are currently using Koha 3.18. There is a link to the manuals from the Koha staff client on the left-hand side of the menu page; under the "What's Next?" heading there is a link to "Read Koha Documentation."

Recognizing a good record: Wendy walked through some examples of cataloging. Search first by ISBN then by title if no record found. Is the item in hand accurately represented by the catalog record? Match the ISBN in 020 field of the record to the book in hand. Look to see if the author matches. If so make sure the title matches; the title in the bib record should be all lower case except the first letter. Look inside the book to see the publisher and date. Move to extent: check pages and size. When measuring the height of the book, if it is marginally over a centimeter always round up to the bigger number. Subject headings should be included in the record: three is a good number but if there is only one suitable subject for the item that is acceptable.

RDA: Catamount procedures say we will try to use RDA records rather than AACR2. You can tell a RDA record because in the 040 field subfield e it says "rda." In RDA records, the publisher details are in the 264 field. Bywater currently doesn't show the 264 field so Wendy has a call in to Bywater requesting that be fixed. There are additional fields RDA uses (336, 337, 338) that are not used in AACR2.

ISBNs: Some libraries have scanners that do 10-digit ISBNs and some that do 13-digit so if you don't find a match by ISBN you must search by title to ensure that you find any matching bib record. If you searched for the 10-digit ISBN, a title search might find a bib record that includes only the 13-digit ISBN, and vice versa. Wendy said often both ISBNs can be found inside the book. Janet added that there is an ISBN converter site where you can search for one and find the other to make sure the ISBN of the book in hand is the same as the one in the record: http://isbn.org/ISBN_converter. We agreed that whenever

we add an item to a bib record that does not have the 13-digit ISBN present then we will add it by adding another 020 field. There was a question about whether we could add a different ISBN to a bib record if everything else in the record matches the item in hand. We agreed that if everything else is an exact match the ISBN could be added.

Incomplete records: There are several ways that a bib record might be incomplete. If attaching an item to an incomplete record we should edit the bib record so it is complete. A record is incomplete if it doesn't say "pages" after the number of pages in the 300 field. There should also be measurements in the 300 field. Editing to complete the record may include adding pagination, adding another ISBN, adding the size so anybody looking at the record can see if it accurately describes the item in hand.

Search tip: When you get a lot of title results after a title search, you can narrow the search down by using Boolean language. In the search box type in the following: ti: title of book here and au: author's name. Ti=title, au=author, and be sure to put spaces after the colons.

Example: "ti: red rising and au: pierce." When we did this search we pulled up two records with the same ISBN, pagination, etc. Presumably there are two separate records that need to be merged because somebody searched only by one ISBN and didn't search by title.

Adding a record: If the book in hand doesn't fit a bib record found in the catalog it's acceptable to put in a different bib record. There are different editions that deserve different records.

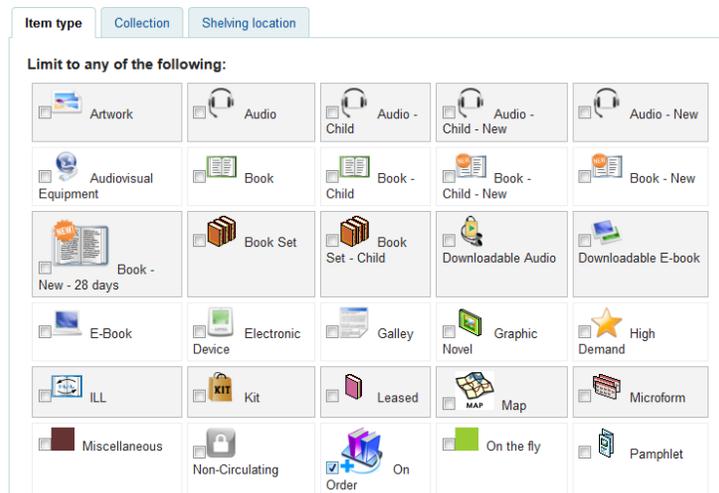
We looked at an example of a Recorded Books edition of an audiobook for which there is a Simon & Schuster record in the catalog. All information points match (ISBN, title, author, number of discs, reader, etc.) and the only difference is the distributor. Leslie asked what the discs say because they are the primary source for non-print material, not the packaging. For a DVD the disc is the first source of information, then actually watching the video, then the packaging. Since the discs say "Simon & Schuster" and everything matches, this item could be added to the existing bib record. If the cataloger wants to indicate that the library's copy is distributed by Recorded Books, a note could be added to the item record.

Wendy finds that Z39.50 searching using Kansas is often a source for good audiobook and DVD records.

On order records: When cataloging an item, always use the same procedures of searching and then making sure all facets of the item in hand match the information provided in the bib record. If the bib record is an on order record but it's a good and complete record that is a perfect match then you can attach an item to that record. We agreed we must change the item type 942 in the bib record so it no longer says "on order." Keep in mind that the library who ordered the item may alter the bib record to fit the item once it is received. We agreed that if we make big changes to a bib record that affects the record then we should notify all libraries with holdings attached. Basecamp is the best way to communicate this.

If the on order record is incomplete and lacks information, do not attach an item to it. Instances of on order records that we shouldn't attach to include those with incomplete extent, no publisher, and no subjects. Instead of using the incomplete on order record, find a good record. There will temporarily be two records for the same title in the catalog. When the library that put the on order record in the catalog receives the item, that library will remove the on order record or merge the records if the item in hand matches the second bib record.

The reason it is important to change the 942 in the bib record so it is no longer "on order" can be seen when doing an advanced catalog search. A catalog search looks both in the bib record 942 default item type and in the item record's item type. You can see this by doing a search for item type "on order" as seen below.



Items that aren't "on order" items (like *The firebird's feather* in screenshot below) still come up in the search results.



When we look at the bib record we see it still says "on order" in the 942 (screenshot below).



Items that say "on order" in the item type of the item record will be included in a search for "on order" item type (see Starksboro's item in screenshot below).

The bib record is correctly coded with item type “book” and not “on order” in the 942.

We agreed we will not use “new” in 942 default item type of the bib record and if we find a bib record with “new” in the 942 we will change it. You can use “new” in the item record.

There was a question about a book titled *Intimate grandeur*. One library has a paperback but everybody else has hardcover. Everything (publisher, pagination, size) in the bib record matches the book in hand. The suggestion was to add the ISBN to another 020 field in the bib record. After the new ISBN the library could use the identifier (pbk). If the library wants to write a note in the item record to indicate that the library copy is a paperback, the library can do so as a non-public note, public note or both.

Consortium code: We don’t have a consortium code for the 040 field. We have individual library codes.

Batch loading records: Jill T demonstrated batch loading records and handed out examples titled “Manage Staged MARC records.” Libraries that get bib records from a vendor like Baker & Taylor might use this. There is an instruction document on Basecamp.

In Koha go to “Tools” then “Stage MARC records for import.” Browse to find the file to import. Jill T usually downloads the records to the desktop so she can delete them after import. After selecting the file click the “upload file” button. In the “comments about” box fill in whatever you want to name the file or you can leave it blank. Change the records matching rule to ISBN. Change the action if match to ignore incoming. Leave the action if no match as add. Check the “Yes” option for checking embedded data. Click “stage for import” button. These records are imported into the reservoir not the catalog. There was a question about what embedded items are but no clear answer.

Once the records are imported, Jill T goes to the “search the catalog” tab and scans the book’s ISBN. Once she finds the bib record the first thing she edits is the 942 default item type and saves it, which moves the record from the reservoir into the catalog. Other libraries use the “add biblio” link to move the bib record from the reservoir into the catalog.

Jill T demonstrated an example of an audiobook that was lost & paid for so there's a bib record in the catalog from the lost item. There is also a bib record in the reservoir that came from the vendor when she purchased the replacement item. She doesn't need to use the reservoir record since there is already a catalog record that matches the replacement item in hand (she checked to make sure the record matched the item). Reservoir records are automatically removed on a scheduled basis.

There was some confusion about why the handout said match applied if the search originally designated not to put the record in if there's a match. It was also pointed out that if you use the "ignore" rule, you may be excluding an incoming record that is better than the record currently in the catalog.

Date acquired: When adding a new item, you don't need to fill in the date acquired in the item record because Koha will automatically fill in today's date when you save. When you are editing an item, like if you are reusing an item record for a replacement, the date acquired date will remain the original date unless you edit it yourself.

Oops: If you make an error you don't know how to fix, it is best to confess quickly. If you make an error on a bib record that you can't undo, contact the other libraries who have items attached to that record. If you accidentally delete a bib record, there may be a copy on the test server.

Inaccurate bib records: We agreed that if we come across incorrect records we should change them.

Deduping: The CLN board decided there will be no deduping by Jess in the future so it is even more important that we are careful to not create duplicate records. Wendy suggested that in future CLN catalogers take on the deduping process. Wendy did about thirty-five titles last month as she stumbled across them. We don't have a plan for deduping; we just should merge records as we come across them. Wendy says there is a report that lists potential titles that might need deduping but it doesn't account for the fact that there are titles that need different bib records, such as when there are large type, book, and audiobook versions. VOKAL doesn't pay a deduper but for a while Catherine did voluntary deduping in their catalog. Merging duplicate records will be easier in 3.22.

Email list of supercatalogers: In the past we have discussed an email list of supercatalogers but it doesn't exist yet. Jill T says it would be helpful to see a contact list for each library's director, supercataloger, and loans contact. Jill C will finish an existing draft of the email list.

Fast add deletions and reports: There was a question about how to delete a fast add record when the item is returned. It is important to delete both the item and bib records. There are a few different ways you can delete fast add records. You can batch delete them by going to tools then "batch item deletion." In the bib record you can go to edit/delete items in a batch. Also you can check mark the item when on normal view of the bib record. Once an item is selected, a menu of actions appears above the library's holdings. One action that appears is "delete selected items."

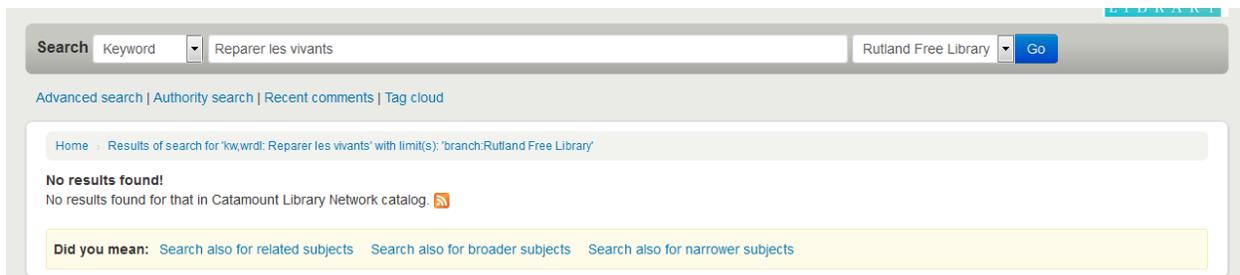
To pull up fast add items you can do a search or create a report by item type. It is currently consortium policy to delete a bib record when it has no item attached. The consortium is looking to add Overdrive records. Once they are added to the catalog there will be bib records that say “no item attached.” At that point we won’t be able to run a script to remove bib records with no items.

Batch deletion: Go to tools/catalog/batch item deletion. Scan the barcodes of items to delete. Click “continue” button. You will get a list of items. If there is a message saying a barcode wasn’t found then presumably the record doesn’t exist anyway and can be ignored. Below the list of items is a check box saying “delete records if no items remain;” always check that box so there are no empty bib records left in the catalog. If you delete an item with a hold in it, Koha deletes the item but not the bib record so we end up with an empty bib record, which we don’t want. Koha does not tell you that it is not deleting the bib record but you get a message of how many items and how many bib records were deleted. If you realize that fewer bib records were deleted than should have been, it may be because of a hold. In order to remove the bib record, you have to find the bib record with the hold, add a dummy item to the bib record so you can remove the hold. Once you remove the hold you can delete the dummy item record and then the bib record.

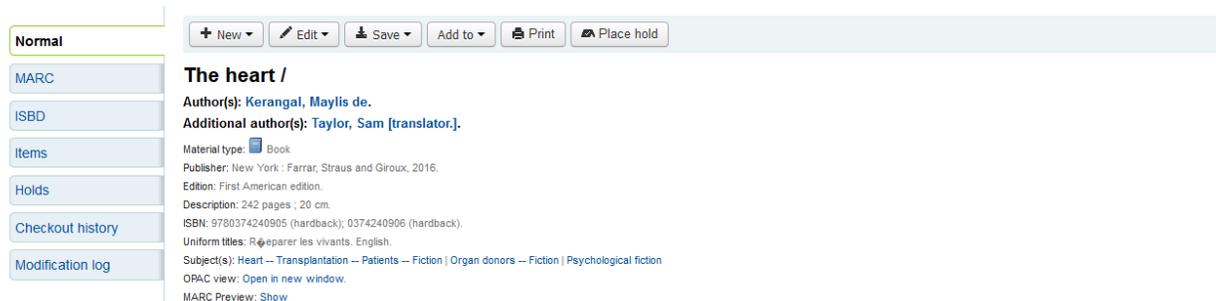
Batch modification: Use this when you want to make the same change in a number of item records at once, like when taking several items out of “new” item type. Go to tools/catalog/batch item modification. Scan barcodes. Click “continue” button. On the edit item record screen make desired changes. Hit save button. If you are trying to change a field with information to a blank or empty field, click on the blank space from the dropdown list, save. You might do this when you are taking items out of “in process” status.

Deleting lost items: The question was asked if items are lost and we delete the item does it delete the charges from the patron’s card. No. In order to delete the item record, the link between the item record and patron record needs to be cut. To do so, go to the bib record, go to items tab and find the copy to delete. In the “lost status” field, change it to blank so it doesn’t say “lost” or “Long overdue (lost).” Click the “set status” button. Once the status is blank it cuts the connection between the patron record and the item record but the title details and any bills and fines will remain on the patron record. The item can be deleted. If the patron returns the item after the item record is deleted, no information will come up because there is no item record. You can use the same item record for a replacement copy by editing the barcode but first you need to cut the link between the patron and that item record. Some libraries leave the overdue item in the catalog in case it is returned. In those cases replacement copies are added as additional items. Bennington uses the “lost” status to indicate something is checked out and overdue. The “missing” status means the item is hiding but is not checked out to a patron. Each library needs to define for itself what “missing” is.

Diacritics: The diamond with a question mark symbol  often appears in records when there was a diacritic such as an accent in the original record. The  diamond does affect search results in both the staff client and the OPAC. Janet provided an example. We searched for *Reparer les vivants* but got no results.



When we searched by author kerangal, maylis, we pulled up the record and could see that the (Reparer les vivants) in the uniform title field prevented the title from appearing in our title search results.



We agreed that we need to edit bib records when there is a in any of the author or title fields. There are a few different ways to replace the with the character that should be there. You will need to have the item in hand to determine what the character should be. Then you can go to the Library of Congress catalog, pull up the record, and copy and paste the correct character in the bib record into the Catamount catalog in place of the . Janet will post to Basecamp a document of common diacritics, a list started by Leslie. You can copy and paste from that. You can also find most of the characters in Microsoft Word and can copy and paste them from there into the catalog. Wendy added that a whole batch of labels won't print if there is even one diacritic present.

Holds: The question was asked if there is a way to tell what bib record a patron has placed a hold on. The library had a patron inquire why he never received his hold and it turned out he had a hold on a long overdue item when there was an item available on a different bib record where he did not have his hold. Nobody knew of a way to identify the bib record.

Wendy suggested that people check in their items after doing a batch modification to change material from new to not new status in order to activate consortium holds. The holds will not be activated until items are checked in, even though the item is available to the rest of the consortium once the status is no longer new.

There was a question about how to identify holds that patrons are waiting for that haven't been filled in a long time. Report #58 "patrons with open holds" lists each library's patrons' holds, whether the patron has requested items from the home library or consortium items. The hold algorithm checks the patron's

home library first. By running this report a library can see the date reserved and figure out how long patrons have been waiting for items.

There was a question about patrons being able to see their rank on the hold list for their library only rather than their rank on the list of consortium-wide holds. Staff can figure it out but patrons can only see where they are on the consortium-wide holds list.

Koha 3.22 upgrade: There is no date scheduled yet for the upgrade. Wendy will post a list of major changes. Archived webinars will be available on the Bywater website after 3/17. Everyone has access to the demo on the Bywater site so if you want to try 3.22 you can do so there. The consortium will not have 3.22 on the test server before going live.

Cataloging handbook: If anybody wants to write documentation for any of the topics listed for the handbook (topic list is on Basecamp) then do so and bring it to a catalogers meeting for discussion. The more documents we have available to refer to the better our cataloging and the easier it is for us.

Support: If anybody has a cataloging problem use Basecamp. Usually one of us has already addressed the problem and there's no need to reinvent the wheel. You can also check Basecamp files to see handbook documentation and other items. Wendy says when making a decision consider what the patrons need to know and what is easiest for the cataloger.

Future meetings: It was suggested we try to meet in person annually. Hopefully those who couldn't make it today will be able to make it next time.

Many present would like a session on reports, not just for cataloging. Deb from Rutland has gotten Bywater to write reports for Rutland. Perhaps she would lead a reports session.

Rutland Library's director Abby Noland knows an expert cataloger and trainer who will do free cataloging training for us. Wendy is discussing topics with her. The current plan is to do a morning and afternoon workshop and catalogers could choose one or both. Tentatively one session will cover good records and one will go into subject headings. There will be a Doodle poll to determine a date for the workshop to be held at Rutland Free Library.

Jill C is still acting as facilitator but will gladly hand over the role to anybody who would like to take it on. The job entails setting up the meeting time and making sure there is an agenda.

We have been meeting on the third Tuesdays of the month so our next meeting will be scheduled for April 19, 2016 as a GoToMeeting. Jill C will ask for agenda items. After the April meeting Jill C will do another poll to determine if there is a better time for everyone instead of third Tuesdays.