

Catamount Cataloging Group
Minutes (Draft)
August 23, 2017
Norman Williams Library, Woodstock

Present: Jill Chase (Waterbury), Janet Clapp (Rutland), Jo Coleman (Springfield), Rene Cressy (West Rutland), Ellen Desmeules (Norman Williams, Woodstock), Leah Gessner (Guilford), Mary Lemieux (Morristown), Leslie Markey (Brooks, Brattleboro), Clare McFarland (Norman Williams, Woodstock), Constance Murphy (Deborah Rawson, Jericho), Wendy Sharkey (Bennington)

Minutes from July meeting. We have no minutes but a partial recording is available on Basecamp.

Roles. Jill has been facilitator since the cataloging group started and Janet has been the notetaker. Anybody who is interested in either task is welcome to take over.

Matching records. When adding new items, it is important to check that the item in hand matches the bib record. It is also important when merging records to check that they accurately match each other before merging.

245 subfield h. Jo noticed a lot of records don't have the 245 h material designator field that indicates sound recording, videorecording etc. That's because RDA records don't require the GMD. Jo and Leslie have been adding subfield h to records, using the proper format. Most agree it helps staff and patrons if that information is there. Patrons do find the OPAC confusing to search so it is good to do what we can in cataloging to make it easier.

DVD records. There was discussion of which DVD records should be merged and how DVDs should be cataloged if each disc circulates separately. Some libraries separate each disc of a set in order to increase circulation numbers. When cataloging separate discs onto one bib record, be sure the description 300 field gives the total number of discs in the set, then in the public notes field of the item record you can identify each disc separately. The public notes field is specific to the item record, which is specific to the individual library. The bib record is shared by the entire consortium. If the bib record title says "disc 1" and it says only 1 disc in the description 300 field, you can only attach disc 1 of the set, not discs 2, 3, etc.

Can we merge DVD records? Only if the two records are the same version and same description. We should not merge a record that says five discs with a record that says one disc even if it is the same title, such as the name of a TV show.

If we want patrons to be able to put a hold on a specific disc, do we need to create different bib records for each disc? For those who want to do that, Leslie suggested Kansas City Library for good bib records cataloging the individual discs of a set.

Self-checkout. Ellen asked if any of the libraries present offer self-checkout? Only Rutland does.

Good records. When adding items or merging records, it's important to have good records. Janet pointed out that the title field and subtitle fields shouldn't have capital letters except in proper names. At least one library types the titles for their ILL titles in all caps so they are easily identifiable as ILLs. Wendy pointed out that both 10 and 13-digit ISBNs should be listed in the bib record. If the item you are cataloging has only one and that is the one currently in the record, use the ISBN converter (http://isbn.org/ISBN_converter) to find the second version of the ISBN and add it to the record. Every book bib record should have the pagination (last printed page number) and the extent (height in centimeters unless the book is wider than it is tall). If a bib record has no items attached, go into holdings and if there are no items listed, go to edit/delete record. We have agreed to delete empty bib records. Bywater ran a script to delete all empty records at one point. Leslie said if deleting records using tools/item deletion you have to check the box to delete bib record or we'll end up with empty records.

Batch deletion. We went into to the test server to test batch deletion. Go to Tools/batch item deletion. Scan in barcodes, click "continue." When Rutland was trained they were told to do only about a dozen barcodes at a time but other libraries have done many more. If items are checked out you will get a message. The system does not identify items that have holds waiting. At the bottom of the list, check the box "delete records if no items remain." After you run the deletion, the screen will show how many items and bib records were deleted. Jo suggested making sure the number of item records deleted matches the number of items you have in hand to discard. If you delete an item with holds and nobody else owns it, then the hold will vanish and we have no way of knowing the hold was never filled. Be aware of that when using batch item deletion because if there are holds they will be removed without patron or staff knowledge or record of it anywhere. Presumably the hold should have been on the holds queue at one point and taken care of through that process. Leslie said there is a stale holds report to list unfulfilled holds that remain in the system.

Test server. On occasion the test server is populated from the production server. The URL is staff.catmount-test.bywatersolutions.com. Your login is the same as your library uses for the production server. The yellow background identifies it as the test server.

Example of merging. When you come across two identical records (same title, publication, pagination, etc), you should merge them even if your library doesn't have items attached to either record. Note: you can mouse over a title to get the OCLC record number to appear in the lower left corner. Some people examine both records before merging; others examine the records during the merge process. In cataloging check mark the two titles to merge, click the "merge selected button" and the two source records will appear on the left under different tabs. The leftmost tab is the default source and has populated the destination record on the right side of the screen. Check the non-source record. Leslie gets rid of 949 in Brooks's records because even when the record is deleted it remains searchable; the 949 is leftover from migration. There should be no local library information in bib records. 945-949 are local fields so you don't need to move 945-949 fields into the final record. If you get a message about a problem because of the 040 field, 040 put your library's identifier in 040.

Dedup plugin. Wendy demonstrated the dedup plugin written by Bywater. It's almost done – the beta version is on test server. In the test server, go to “tools” then “tool plugins” under additional tools. Select “deduplication tool plugin.” Go to actions and click “run tool.” Select an area of your library to compare with the entire catalog; you can select home library, current library, shelving location, item type, collection code, status. The truncation symbol % tells the plugin to fill in the blanks after the % symbol. For example, “fic s%” means any call number that begins “fic s.” Use an underscore (_) if you want to wildcard for only a single character. Select ISBN to match (can also choose OCLC number or ISSN, but even though it is an option **do not** use bib number). We're most likely to use the ISBN. Click the “search for duplicates” button. The results come up with columns of duplicates (3 columns if 3 matches). The record with the filled radio button indicates the longest of the possibly matching record (not necessarily the best record). There is no link to the bib records so you can't view complete information. Every field between 245 and through 300s would be valuable for bibliographic description. Wendy said she can add fields. The plugin goes through every ISBN in a record and compares. We shouldn't merge two records that have two different but equivalent ISBNs using the merge tool because we need both ISBNs (10 and 13 digit) in the record. Ellen said the list doesn't show which bib has a 520 field. Janet said it would be helpful if there was a link to the bib records so then we could see all of the information in order to determine if the records match and which record should survive. Unlike the merging we've been doing, the plugin doesn't merge bib records, it just attaches all item records to the selected bib record. Information in the bib records that are not selected will be lost so work a cataloger has done (adding a 520 or 490 for example) will be deleted if not in the chosen record. Wendy said we should be selecting records with the same extent, same publisher, both ISBNs, more subject headings (preferably not Sears). If the records shouldn't be merged using the plugin we will need to open a tab and merge the other way. Using the plugin, once you've marked the records you want to merge with radio buttons in front of the preferred records, hit the “merge selected records” button. If a record is not marked in the square check box it is left as is. The screen will then show results of the merge - what record number items were merged onto. If we see “record not found, indexes may need rebuilding” that should be a test server issue only because the test server is indexed less frequently. Jill C said we can use the plugin to pinpoint records and then go into regular merge. Wendy doesn't know if we can add a link but we can add fields, which would make the results list longer.

Wendy will ask if we can have a link to the actual bib records from the dedup tool results. Wendy can add 250 field but is concerned about adding 520 because of its length. Wendy will have Bywater fix spelling mistakes.

On order records. Duplicate records are sometimes temporarily created because of on order records. We can attach to an on order record if the record is complete and matches the item in hand. If the on order record is incomplete, the ordering library will complete the record to match the item in the hand of that cataloger. If we create a new record because we don't want to attach to an incomplete on order record, the ordering library will merge records that match when cataloging the new item. We had agreed in the past to change the item type 952 in the on order bib record from on order to the permanent item type (book, book-child, video, etc) but that is the only editing we should do to an on

order bib record. If the item being cataloged is different from the one described in the bib record (pages, edition, etc), there needs to be a different bib record.

Cataloging standards. The minimal cataloging standards for the consortium are in the handbook: use 336, 337, 338 fields, good records (preferably RDA), at least one LC subject heading. With subject headings we can't just make up subjects. Some of us have edited or replaced poor records that we found. Leslie said what we catalog from now going forward should be good records but it is not worth our time to recatalog older items.

Materials specified. Jo said the materials specified field (subfield 3 in the item record) is not popping up in circulation. Wendy said that should come with the next software upgrade, which is fall presumably but Wendy will check.

336, 337, 338. Wendy says Bywater will run a script soon to put 336, 337, 338 fields back.

Locations on search results screen. Janet asked if the search results screen could show the owning rather than current location. Wendy said we would have to pay if we want that to happen but it is a development we can ask CLN to consider paying for. Leslie suggested the search result screen show both current and owning locations instead of just the current library. All agreed to request this development from the CLN management group. Wendy will submit the request to management.

Libraries listed in OPAC. Janet asked if we can have "owning" and "other libraries" tabs in the OPAC like we do in the staff client. It confuses patrons when they see all the libraries listed, especially if it's a long list and their library is not visible without scrolling. All agreed we want to ask management for that development as well as the search results change. Jo suggested we find out how much each development costs and then we can prioritize as needed.

Wendy said there is also crowdfunding so other Bywater libraries interested in a specific development may help to pay for it.

Item specific holds do not seem to be working. Instead of holding the requested item, the next available item is pulled. Wendy said Deb takes care of hold questions and would be the one to report it to Bywater.

Staff permissions can be changed so staff can't edit items. The superlibrarian has control over what permissions each login has.

Next meeting would be October because we meet every other month but that's NELA. Wendy suggested a GoToMeeting in November, specific date to be decided.