

Cataloging Advisory Council - 9:30 on Thursday 2/4/16 at UHLS.

Present: Lisa Bouchard (BETH), Rob Carle (UHLS), Sue Dague (EGRN), Katie Farrell (APL), Jane Feeney (BETH), Karin Martin (BETH), Peg Mello (COLN), Jendy Murphy (APL), Jen Murtha (VOOR), Lisa Pitkin (GUIL), Catherine Stollar Peters (BETH), Joe Thornton (UHLS)

Action items from last meeting:

- Joe will request a reload of our data into Decision Center, and also a method for us to check accuracy in Decision Center, such as adding the ability to see total items for each location code.
- Joe will ask for more training in Decision Center, in addition to the 2-hour training video. 2-hour training at end of February. Members can continue to add questions to Joe's Google Doc. See #1 below.
- Enhancement request will be made for Encore and Checkout to make the 245 the first to show up, not the first title field. (240 or 130, for example.) This will be a Sierra decision based on all users of Sierra. This was fixed for 240s, not for 130s. Nothing more will happen.
- Joe will rewrite his Total Items to exclude statuses of withdrawn, on Order and Online. At the end of the year, he will compare the Horizon annual numbers for Total items and compare to Sierra Total items. Rob has been exporting data to Excel for the Withdrawn items he has deleted, so he can also share that with member libraries. See discussion #4 below.
- Joe will investigate. He'll see what it costs. Joe will continue to investigate.
- Jendy will survey UHLS about BWB, and share back with group. Enough for now.
- UHLS will communicate to the Database list about the proper protocol for using serial records rather than monographs. He will also indicate where this (and other) protocols can be found on the UHLS site. See Serials training in April - #5 below.

1. SCAT table (what it does, how it's used, and how to update it).

- Decision Center. Collection Tools. Evaluation. Circulation. Can see call number range by owning location. But this is dependent on scat tables being set up to recognize call number ranges.
- Catherine offers to come up with a first draft. This committee will review and make changes so the scat tables work for all libraries.
- Problem is greater for fiction or call numbers that start with a letter, and the variations between libraries.
- Every library would have to look at their own call numbers and respond to the first draft.
- We can have up to 9 scat tables, but we would have to pay each year.
- Joe will send a reminder that staff should start using Decision Center now, so they can add questions to Joe's Google Doc which III will respond to at end of February.
- Rob reminded us about training videos on UHLS site, including about Decision Center.
- Rob suggests that we should look at setting up Collections in Decision Center (under Collection Tools.)
- Note - to find grace period, click on Loan Rule. it is on the bottom. Pretty much anything below 200 has 1 day, anything over has 0.

2. Adding and maintaining patron tags in Encore.

- Done in Encore through patron record. Staff could use an agency card.
- Right now, patrons are adding a lot of tags, but many are very personal, and not useful to anyone else. So, question is whether we should administer this, or limit patron access. Patrons obviously don't really understand what the Tags are for.
- **Joe will bring this to the attention of Deanna and Mary Fellows. Suggest training/communication for all staff and for patrons on how to use My List and on how to create and use Tags. Perhaps a workshop is needed.**

3. Reminder to update bibliographic records along 5 match points before adding items for circulation. (Catherine) 245 sub h, 300, and at least one 650, etc..

- **Joe/Rob will send out a reminder to member libraries of what these match points are and where to find this info on training site. (Rob will update examples.) It is the responsibility of the library adding the first item to check the Bib record for these match points. This is not always the library that imported the bib record. Large libraries should always look at Bib record (click Edit) as first step before adding an item.**
- **Rob will also run reports to fix material types more frequently. (ie, LPBs)**

4. Deleting item records -- effect on reports (e.g. Additions to Holdings) -- We can't count what's not there. (Joe)

- Item Holdings report (in monthly reports) does not look at status. It adds current month **Items Added** to last month's **Total Items** (collection size), then subtract current month **Total Items** to get the number "withdrawn" in current month.
- Rob deletes all item records with Withdrawn status, excluding any that were created during current month. (Except for Colonie and Voorheesville - they will delete their own.) Usually on Fridays, and also last day of month. So items created in any month, and changed to Withdrawn in that same month, would remain with Withdrawn status until the first Friday of following month.

5. Maggie Horn - Serials training in April. Maggie is retired but has agreed to come and train us.

- All staff many need help identifying what is or should be a serial.
- Can add item note information if desirable.
- Katie and Chris Havens have been working on bound copies of Metroland. In order for ENCORE to display all issues within each bound volume, the best method seems to be to create a Holdings record.
 - **Katie will share APL procedures for this method.**
 - Suggestions made to consult with Sienna, or with Carrie at CDLC.

6. New OCLC CatExpress import method (Rob)

- Rob will alert us when he has to change to "new" method. We will report back to him if we don't see new records show up.

7. Future meetings will include review of last minutes and action items.
8. Discussion of how cataloging/technical services departments are set up, how they function.
 - Peggy will suggest some dates.
9. Baker & Taylor - TS360 reports.
 - Peggy showed us some potential issues with reports and the Extended estimated Cost

NEXT MEETING - First Thursday in March: March 3, 9:30 Am at UHLS.