

## Catalog Committee May 5, 2016

Attending: Joe Thornton & Rob Carle (UHLS), Peggy Mello (COLN), Jendy Murphy & Katie Farrell (APL), Lisa Pitkin (GUIL), Sue Dague (EGRN), Lisa Bouchard, Jane Feeney, Lisa Thomas & Catherine Stollar Peters (BETH), Jennifer Murtha (VOOR).

### Agenda

1. Review minutes from April
  - a. Meeting at Colonie (Peggy) was very interesting, comparing how we run our tech services departments. About 5 attendees. Possibly repeat in future.
  - b. Serial workshop - see discussion below.
  - c. Joe's STAT google doc has been sent out. Not much action. No next meeting set for the Ad Hoc Stats committee,
  - d. Z39.50: Original ticket was Sept 2015. Recent ticket April 12, 2016. Still no response. **Joe will nudge.**
  - e. Call Number Trends - **Jendy will articulate what she wants to see.**
  - f. Follow up on BluRay combo discussion from last month: For libraries who do not split combo packs (so item has both BluRay & DVD) there is a problem due to the Material Type on bib record. Catalogers must change 245|h to BluRay so Rob will change bib Material type to BluRay. **Each library will look into cleaning up their own before Rob attempts any global changes.**
2. SCAT table progress
  - a. Catherine reported. Dewey OK. However, we cannot get granularity for call numbers after the first space. We would have to purchase an additional SCAT table. She does not recommend this. We will just have to accept that for now.
  - b. This SCAT table is useful for Decision Center and also for Sierra Statistics. Looking at Statistics - "call number" is still useful for many ranges.
  - c. **Catherine will send final alpha changes to Rob so he can update SCAT table.**
  - d. Statistics - "Sticky Status" - not sure what this is, but all our records get "bad code." Perhaps this is something from Sierra upgrade to 2.2. **Rob will investigate.**
3. RDA Toolkit (it's back on sale)
  - a. Joe has asked for a subscription - one license. (about \$150).
  - b. Shows up in Sierra already: Cataloging - Tools (from within a record.) Takes you out to RDA Toolkit site. Requires a login. **Joe will let us know when he gets the login, and we will test it out. With only one subscription, it may only allow one user at a time.**
4. Maggie Horn workshop -- reactions
  - a. She did a good job. Staff learned basics. We should have ongoing discussions when questions arise about what is and is not a serial.
5. Sierra 2.2 upgrade. Problems? Surprises, pleasant or otherwise?
  - a. Joe says it was easiest ever.
  - b. In circulation, box asking if you want notification for when patron record due to expire. Perhaps in Notices. **Joe will look.**
  - c. FTP arrows for "get" and "put" are helpful
  - d. Create Lists has
    - i. Import Records, and also
    - ii. Classic, Advanced & JSON search options, which change the view of search. JSON allows copy & paste of searches.
    - iii. Some new Conditions (within last week, is this many weeks ago, not within, etc.) Some of these don't produce good results, however.

6. Jendy raised issue of saved exports and searches. Just that we will run out of lines over time. Difficulty of knowing who saved what. Everyone should try to use protocol of including library and initials and date. **Joe will ask for more in Saved Exports.**

Minutes – April 7, 2016:

Joe Thornton & Rob Carle (UHLS), Lisa Thomas, Karin Martin & Lisa Bouchard (BETH) , Jendy Murphy & Katie Farrell (APL), Lisa Pitkin (GUIL), Sue Dague (EGRN), Jennifer Murtha (VOOR), Peggy Mello (COLN)

- 1) Review minutes from March
  - a. Enhancement request for having 245 the first field to display. Particularly important for foreign language titles. Joe reports that this could be expensive.
  - b. Withdrawn items. Joe's March report still has some negative numbers in the calculated total of number withdrawn. Discussion about possible reason(s): changes in location codes, date the items added report is run. Rob still deleting withdrawn items at beginning of the month, but never for Colonie and Voorheesville. Some libraries are deleting their own. (Joe's formula is basically.... How many at end of last month. How many added during month. New total. Therefore, this is how many must have been withdrawn.)
  - c. Metroland – Serial record with holdings. "Identity" in Serial module is the branch. Scroll through holdings to find month/year range. III corrected an issue so now these holdings show in Encore.
  - d. Meeting on 14<sup>th</sup> at Colonie. **Peggy will create a google doc with questions and discussion about how each cataloging/tech services department functions to share with whole group.**
  - e. Scat Table
  - f. RDA tool kit. UHLS will get, but may not start till fall
  - g. Maggie Horn, Serials training on 4/20/16. Everyone should RSVP. **We all should share invitation with other staff also.**
  - h. Authority control. Database is out at LTI. Joe will let us know when it is back. Deleting bib records is OK. Merging and overlays not OK.
  - i. Reports – ad hoc "Stats" committee of directors. Joe working on collating what reports they want, and where is best place to get them, or if they need to be created. **Joe will be sending out a Google Doc for all to respond to.**
  - j. Z39.50. Failing in new ways. **Rob will refresh ticket with III. Rob will query IUG user group.**
- 2) Scat Table – **new deadline to get additions to Joe: April 15, 2016**
  - a. Decision Center – seven reports depend on our call numbers, as managed by a Scat table:
    - i. Call number range by Item Type
    - ii. Call number range by Owning Location
    - iii. Call number range by Patron Type

- iv. Call number trends **Joe will take a look and see if it is possible for him to recreate this.**
    - v. Expenditures by Call number range and Funds
    - vi. Expenditure trends by call number range
  - b. Many “losers” in scat table. Perhaps too many to make it useful for most of us. Issue of how to know what works and what doesn’t – for us now and for staff in the future.
  - c. Call number range by Joe has created a Location Weeding report (by call number) where we can enter a call number prefix. UHLS – Ad Hoc reports (Sierra) “Weed by Call Number.” Joe could run other reports that allow us to enter call number prefix.
  - d. Rob mentioned that we can use the index option in Create Lists (rather than range) and select Call no range.
  - e. Rob also explained that you can edit name of review file (to add “keep” for example) by selecting “rename” at top (next to “empty”).
- 3) Process for updating Material Types.
  - a. Rob is running weekly reports to update based on “subfield h matches or does not match material type”, and then he does a Global Update. Graphic novels require using “6xx field has Graphic novel.” He updates these as well.
  - b. Peggy raised issue of this being more of a problem for patrons. It might be better to nest GNs and LPBs under Book. But GNs don’t have a subfield h. Bigger topic than we can address right now.
- 4) Cataloging DVDs versus BluRays. Start discussion about combo packs with DVDs or digital access disc. Which material type? Will there be an issue with new “ultra” format? If they are split, we should strip the UPC if it refers to wrong material type.
- 5) Sierra upgrade scheduled for 4/19/2016 overnight to version 2.2. Our III server is moving from California to Syracuse. Don’t know when.
- 6) Next meeting Jendy would like to discuss using and sharing a spreadsheet with Loan Rule Determiner, Loan Rules, Item Types and Patron types all together for each library.
- 7) Rob offers help with cleaning up bib records. Send him email.