

## Cataloging AC Minutes 5/3/18

### ATTENDING:

Rob Carle, Joe Thornton (UHLS), Jendy Murphy, Katie Farrell (APL), Lisa Pitkin (GUIL), Jen Murtha (VOOR), Catherine Stoller-Peters, Lisa Bouchard (BETH), Peggy Mello (COLN), Sue Dague (EGRN)

### Old Business:

1. Checked out items marked withdrawn cannot be deleted. **Rob will run a Create List report periodically. Libraries should look at and correct their own items (check in and also change status back to withdrawn).**
2. Item Type simplification. All libraries have completed this project. Item types with no items will be deleted. This will help AAC continue with standardization project. Joe will also clean up the Loan Rule Determiner table.
3. Rob has experimented with removing one EGRN location code and did not find problems. **Rob will continue to test with other codes.**
4. Joe added author field to "Search by Item Status" ad hoc report. **Joe will also add item record number, and remove the months owned, total CKOs, Last Year Circ, and YTD circs.** Columns are sortable now.
5. Decision Center - Admin - Other Configurations – changes that Jendy made are OK.
6. Holds Audits done. Recommendations can be found here and on UHLS committee pages: <https://docs.google.com/document/d/1taLtXW1hCv4HaZBjGvsPzXfTGmQI6NANg3kxzOGgf1U/edit>
7. New process for changing item holds to bib holds. Use Search/Holds. In bib summary view, select an item. Click "Transfer holds". Choose option to move hold to bib record.
8. Discussion about Sierra logins and permissions and overrides. **Contact Rob or Joe for help.**
9. Last month we talked about duplicate patron requests on DVD record as a result of duplicate records for same DVD being eventually merged. BETH is experimenting with Marc-on-the-Spot from Midwest which could be a good solution. However, BETH is paying for each of these records, whereas UHLS pays for CatExpress records.
10. Discussion about which vendors are used for various AV – audiobooks, music, DVD.
11. Duplicate patron requests on DVD record as a result of duplicate records for same DVD being eventually merged. **Joe will investigate creating a report. Discuss further at next meeting.**

### Agenda:

1. Rob mentioned that there are a lot of review files marked "keep". **Libraries should delete any they no longer need.**
2. Material Type for microform items (and 245|h, and image for Encore). (Jendy). **Joe will check to make sure no bib records now use Old Manuscript material type, correcting any he finds. Then he will create a "Microform" material type. Rob will change the 245|h to [microform]. Committee members will look for images Joe can use for microform in Encore.**

3. How to use the Web Management Reports on the Training page? Lisa (GUIL) particularly interested in Acquisitions.
  1. The Funds report here will show only the hierarchy view(s) a library has set up for their funds.
  2. Catherine (BETH) uses Circulation Activity Reports to see back-dated checkins for the day the item was actually touched, before because Decision Center only shows the date it was back-dated to.
  3. Generally, Decision Center provides more and better reports. There are Acquisition reports there also. **UHLS acquisitions libraries should explore these.**
  4. **Rob offers training on all of the above as needed.**
4. Rob asks **GUIL and APL to look at review files – #33 (APL) and 3#4 (GUIL) – “bib no item fully paid order”**. Can these bib records be suppressed? If a new item is ordered and added in the future, cataloging staff *should* notice that the bib is suppressed, and unsuppress it at that time.
5. Review file #74 – orphan bibs without eContent (or items). Can they be deleted? Report should be run again to check for any holdings. **If no items and no holdings, and if older than 90 days, Rob can delete.**
6. New functionality in Create Lists: In a new search, or on an existing one, choose search – see new button at bottom “Use existing search.” You can choose an existing search for any other review file, or the row you are on.

Next meeting: June 7, 2018, UHLS 9:30 AM.