

## **Meeting summary for Cataloging Advisory Council (01/04/2024) [Zoom Summary, edited]**

### **7XX section of the Cataloging Manual**

We went over some potential updates and corrections, with Sue suggesting the removal of outdated examples such as CD-ROMs. The group then decided to move on to discussing 8xxx in their next meeting. The conversation also touched upon an upgrade to *Sierra* 6.1, with Sue highlighting a positive change in the display of library locations in item records.

### **Sierra 6.1 New Feature Demonstration and Discussion**

Rob demonstrated a new feature in the item record that displays the last item status change by hovering over it, which could be beneficial for reports. Anne asked Rob to share his screen to illustrate this feature. We also discussed the problem of locations (e.g. cla) displaying in the *Location* section of a bib record when COLN doesn't own any relevant items. Rob also demonstrated a feature of the system, which allows users to view a patron's actions by right-clicking on the patron's name. This feature allows users to view the check-out history of an item and the last patron to check it out.

### **Encore Technical Issues**

Rob, Peggy, and Joe discussed issues related to *Encore's* various versions and the technical problem Peggy observed with a user's customization settings or a timed-out function. They agreed to experiment with different devices and browsers to better understand these issues. Rob speculated that the problem might be due to a tablet's different design, while Joe suggested it could be related to a function timing out in *Encore* and being redirected to *Webpac*. They decided to investigate further, with Joe planning to try and replicate the issue after the meeting. They also raised the possibility that the URL could be causing the problem, but no definitive conclusion was reached.

### **Memory Kit Creation for Alzheimer's Patients**

Peggy, Rob, and Sue discussed the creation of Memory Kits for Alzheimer's and dementia patients. They addressed the content and structure of the records Peggy was creating, with Rob suggesting a macro to streamline the process. They identified a potential typo and discussed the inclusion of related terms in the records for identification purposes, with Sue suggesting it wasn't required but could be useful. There was also a discussion about brackets in the Publication Date field and the importance of distinguishing individuals with shared names.

### **Library of Things Cataloging Update**

Sue, Peggy, Rob, Anne, and Xiaofei discussed the cataloging of *Library of Things* items. They decided to add a "Library of Things" note in the 500 field for better accessibility through keyword searches. They also clarified the use of the second indicator in the bib record, with Peggy deciding to use 0 for "Source not specified." Additionally, Sue pointed out duplicate subject headings and suggested eliminating them to avoid clutter. Xiaofei agreed to update the APL records accordingly.

### **Macro Usage for Efficient Bibliographic Record Entry**

Rob demonstrated how to use macros for efficient bibliographic record editing. He offered to set up macros for anyone who provides specific information, such as their username and password. Rob also suggested having a cheat sheet for macro descriptions and discussed the potential use of substitution phrases in the MARC editor. He demonstrated how to use macros for record creation and ISBN management. Rob also explained how to insert, adjust, and locate text using specific commands. He mentioned the possibility of saving the record once completed and demonstrated the use of macros for original cataloging. Anne pointed out the need to list the location first in the record, which Rob agreed with, clarifying that they were only demonstrating functionality, not establishing best practices.

### **Macros: Efficiency and Limitations**

The group discussed the use of macros, with Peggy sharing her experience of using them to simplify typing group names. Rob suggested a cheat sheet to keep track of the functions and he mentioned Albany's use of macros. Peggy proposed a right-click option to add macros. The limitations of *Sierra's* Macros feature were discussed, with Sue, Rob, and Xiaofei confirming that it couldn't input multiple fields simultaneously, which could be frustrating for tasks requiring repetitive entries. Rob mentioned trying the Macros feature in other systems and found it lacking. The group expressed interest in a system capable of handling large chunks of text at once.

### **Technical and Record Management Discussion**

Rob advised using *SkyRiver* for managing unassigned numbers and creating record templates. Lisa and Anne discussed some technical issues Lisa was experiencing, which they managed to resolve temporarily. Anne raised a question about adding non-indexed numbers to records, which Rob suggested was unnecessary. Xiaofei raised a question about a hyperlink in the 856 field related to ebook content. Rob was hesitant to make changes but agreed to reconsider if a consensus was reached. They agreed that Xiaofei would send an email detailing the issue for further discussion.

### **Bibliographic Record Cleanup Concerns**

Anne expressed concern about the cleanup process when items are removed from the bibliographic record, particularly the location field. Peggy confirmed experiencing the same issue. Rob explained the potential implications of removing an item's location, including its impact on other records linked to the bibliographic record such as holding or order records. The group agreed that the bibliographic record should accurately reflect when a library no longer owns an item. They decided to seek further clarification on the issue from III.

### **System Updates and Order Record Complexities**

Joe suggested that the location field in the system should only be updated by III. The group discussed the complexity of order records. We also considered the issue of withdrawing items with order records, particularly in relation to the *Sierra* and *Horizon* Acquisition systems. The impact of the location code in the bib record was discussed, and the idea of removing it from items on hold for a certain period was introduced. The group decided to revisit this issue and

encouraged further discussion via email. They also discussed an upcoming cleanup process related to the 856 subfields, with Xiaofei tasked to send an email about it.

**Next steps**

- Rob will correct the mistakes in the 7XX document and clean up the examples.
- Peggy will add a 500 note to each of her 4 records.
- Peggy will add a 500 field to COLN's Library of Things records and a 650 indicator.
- Rob will follow up with Illabout updating location fields in bibliographic records when item records are removed.
- Rob and Joe will review the message from Ill and discuss it in the next meeting.
- Xiaofei will send an email about the 856 cleanup.