

## **Meeting summary for Cataloging Advisory Council (04/03/2025)**

**[Zoom summary edited by Joe]**

### **Quick recap**

The meeting covered a range of topics, including challenges with book ordering processes, and demonstrations of various system functionalities. Team members discussed issues with suppliers, explored new website features, and shared tips on using browse queries and Create Lists in their catalog system. The conversation ended with a reminder about staffing changes and an upcoming decision on new leadership.

### **Next steps**

- Peggy to prepare and present a show and tell of her process for using Upper Hudson reports at the next meeting.
- Rob to provide Global Update access to Peggy, Stephanie, and other large library staff members.
- Rob to follow up with anyone who wants a review of the techniques Peggy demonstrated.
- Joe to post the minutes from the last meeting on the Upper Hudson website by the end of the week.
- Joe to inform the group about the new Executive Director of Upper Hudson once the decision is made.

### **Summary**

#### **Addressing Baker & Taylor Issues**

In the meeting, Peggy and Anne discussed the challenges they were facing with their book ordering process. They highlighted the issues with Baker & Taylor, including delayed deliveries and high backorder rates. They also mentioned the need to check the backordered titles regularly and the process of ordering books through Amazon. The team also discussed the possibility of using Ingram as a backup and the potential costs associated with it. They also touched upon the issue of publishers printing fewer copies and the impact of Baker & Taylor's transition from Follett. The conversation ended with Joe acknowledging the importance of the discussion and the need to address the issues.

#### **Zoom Meeting Summary and AI Function**

Joe discussed the new website and his method of using Zoom summaries for meeting minutes. He also mentioned that he would post the minutes on the Upper Hudson website by the end of the week. Peggy expressed her excitement about the AI email polish function in Gmail and asked about sharing screens when using two monitors. Joe explained the process of sharing screens and Peggy shared two tips, one about the

browse query. There was a brief confusion about sharing screens, which was resolved by Anne's suggestion to stop sharing and then share the edge browser.

### **Correcting Mislinked Items With Browse Query**

Peggy demonstrates how to use the Browse Query function to identify and fix mislinked items in the catalog. She shows how to search for specific item types and locations, and explains how to save JSON queries for future use. Peggy also highlights the difference between Browse Query and Create Lists, noting that Browse Query doesn't use up a line and doesn't have a time limit. She then demonstrates how to manually correct the Item Type for mislinked items.

### **Peggy Demonstrates System Navigation Shortcuts**

Peggy demonstrated shortcuts for navigating and editing records in a system, including using control keys for moving forward and backward in lists and for marking records. Joe and Rob discussed the potential benefits of granting access to a tool called Global Update for batch changes, but Joe decided not to give everyone access to it. Peggy confirmed that she had completed the tasks she was working on and did not need to clear anything out.

### **Managing Lists and Rapid Updates**

Peggy demonstrated how to create and manage lists in a system, including running queries, copying and pasting data, and sorting items. She also showed how to use the 'Rapid Update' feature to change the status of multiple items at once. Peggy offered to provide a review of the process for anyone interested.

### **Using Browse Query and Create Lists**

Peggy and Rob discussed the use of the Browse Query and Create Lists in their work. Rob expressed his preference for using Create Lists, but acknowledged the usefulness of the Browse Query. Peggy demonstrated a technique for finding back orders using Baker & Taylor, which Rob found clever. They also discussed the benefits of exporting data from Sierra, including the ability to view all fields and re-import data as needed. Rob offered to provide one-on-one demos or group demos for those interested in learning more.

### **Sierra Query for Physical Items**

In the meeting, Rob demonstrated how to use a long query in Sierra to identify physical items by Material Type. The query was extensive and could be edited for additional Material Types. Rob also mentioned the ability to demonstrate this to others. The conversation ended with Joe reminding the team about Tim Burke's last week and the upcoming decision on the new Executive Director of Upper Hudson.