

## Meeting summary for Cataloging Advisory Council, Thursday, May 7, 2026

### Zoom summary edited by Lisa Bouchard

#### Meeting summary

**In attendance:** Rob Carle (UHLS), Joe Thornton (UHLS), Chris O'Brien (BETH), Peggy Mello (COLN), Pam Jacobson (SNLK), Anne Coletta (BETH), Lisa Bouchard (EGRN), Xiaofei Li (APL), Stephanie Anderson (APL), Sarah Kerr-Mace (MEND), Kathleen Tyrrell (GUIL), Carrie Allmendinger (TROY)

#### Quick recap

The cataloging team meeting focused on addressing recent issues and following up on outstanding action items from previous meetings. Stephanie raised concerns about cataloging errors, including problems with a museum pass record as well as a DVD merging issue, which UHLS acknowledged and took responsibility for. The team discussed ongoing challenges with the transition from Baker & Taylor to Ingram, with Anne reporting continued backlogs due to processing bottlenecks. Several follow-up items were reviewed including OCLC export improvements shared by Carly, large print book cataloging procedures, and the status of Overdrive records in Sierra. The conversation ended with discussions about Vega search results being overly fragmented for popular series like Sarah J. Maas books, with plans to submit tickets to III for clarification on better cataloging practices.

#### Next steps

##### Anne

- [Send Joe and/or UHLS the email from the librarian with the example of duplicate records for the same book, to support the III ticket about Vega search results.](#)

##### Joe

- [Resend the reply from III regarding the OPAC note workaround to the group after the meeting.](#)
- [Check and nudge III on all outstanding tickets, especially those related to enabling patrons to place holds on order records in Vega Discover.](#)
- [Investigate with III whether on-order records can be displayed by location in Vega Discover, and if there is a setting or enhancement to enable this functionality.](#)
- [Follow up with III about the 24-hour lag in Vega updates and whether there is an enhancement request to reduce or eliminate this lag.](#)

- [Follow up with Judith about the rationale for keeping Overdrive records in Sierra and report back to the group.](#)
- [Look into the possibility of changing the "recently returned" status language in Vega Discover to something more appropriate \(e.g., "on shelving cart"\), if possible.](#)
- [Follow up with III regarding better recommendations for cataloging practices \(e.g., which MARC tags to use\) to optimize how records display in Vega, based on feedback from Stephanie and others.](#)

### **Kathleen**

- [Resend the URLs to Joe regarding the "in library use only" status display issue in Vega.](#)

### **Stephanie**

- [Provide Joe with examples of libraries \(including bib numbers and specific issues\) where Vega displays on-order records by location, to support the request to III.](#)
- [Send Joe bib numbers and details of problematic records \(e.g., A Court of Thorns and Roses series, Diary of a Wimpy Kid\) for Joe to submit as a support ticket to III, asking for recommendations on how to reduce duplicate/fragmented bib records and improve cataloging practices for cleaner Vega display.](#)

### **Rob**

- [Use the provided bib numbers and details from Stephanie and Anne to condense and submit a support ticket to III regarding the handling of multiple bib records for the same titles/editions in Vega.](#)
- [Continue running the URL cleanup process in the author and subject fields every other day.](#)

### **Summary**

#### **Museum Pass Records Issues**

The team discussed issues with museum pass records in Sierra. Stephanie reported problems with a recently added WildPlay Thatcher pass record that was accidentally merged with an existing record by UHLS staff, resulting in the loss of Albany's data. UHLS took full responsibility for the error and apologized, promising to be more careful with new records, especially those with recent creation dates. The discussion also covered contact procedures for smaller libraries experiencing cataloging issues. Joe will update the list of cataloging contacts.

## **Petersburg Library and Fulfillment Issues**

Stephanie discussed a Petersburg DVD being incorrectly merged with a new Criterion DVD, which required additional work to fix. UHLS took responsibility for the oversight and agreed to be more careful in the future. The team also discussed ongoing challenges with processing high volumes of materials due to the transition from Baker & Taylor to Ingram, with some backlogs still present. Carrie mentioned that Road Art's fulfillment is slow, particularly for calendar-year libraries, as they prioritize mid-year libraries.

## **Library System Updates Discussion**

The team discussed follow-up items from previous meetings, including updates on OPAC notes, enabling patrons to place holds on order records, and removing Hoopla records. Joe acknowledged that responses from Sierra and Discover often indicate issues will be fixed in future releases, which has been frustrating. Stephanie raised a question about enabling patrons to see location information for on-order records in Vega Discover, noting a difference from the previous Encore system where location details were visible.

## **Vega System Display Issue Discussion**

Stephanie and Kathleen discussed an issue with displaying on-order records in the Vega system, where patrons can see items as "not available" but don't know which library has them on order. Joe agreed to look into enabling this feature, noting that it may be a global control setting. The team also briefly mentioned a separate matter regarding an email thread between Rob and Dustin about Guilderland's recommendations, which Joe will follow up on.

## **Vega Discover System Implementation Issues**

The team discussed strategies for resolving issues with Vega Discover system implementation, including seeking guidance from other libraries like Seattle Public Library and Mid-Hudson. Stephanie reported finding helpful information on Reddit's Vega public library forum, though some technical issues require submitting a ticket to Triple I for resolution. The team confirmed that Hoopla records have been successfully removed from Sierra, and Anne suggested using "recently returned" as a more accurate status indicator than "on shelving cart" in Vega Discover.

## **Large Print Book Classification Guidelines**

The team discussed the proper classification of large print books, clarifying that they should use the 655 genre heading for large print books rather than large type books, which is not an official genre. Anne explained that large type books are only authorized as a subject heading, not a genre, and that large print books are typically found in edition statements rather than subject headings. The discussion concluded with confirmation that no action was needed regarding large print book classification, as the correct process was already understood.

## **URL Cleanup and Technical Solutions**

The team discussed cleaning up URLs in author and subject fields, with UHLS confirming they would run this cleanup process every other day. Anne and Carly shared positive feedback about a technical solution for OCLC exports to Sierra, though UHLS noted it requires technical expertise and may not be necessary for smaller libraries that process records individually. The group agreed to share Carly's email with the technical solution to help libraries that could benefit from it, while acknowledging that smaller libraries with limited record imports might not need this specific tool.

## **Library Catalog Display Issues Discussion**

Kathleen and Joe discussed the display issue with local history items marked as "in library use only" in the catalog, where some show as "not available" while others show as "available" but not for checkout. Joe noted that the same issue appears to affect multiple items. The conversation then shifted to Overdrive records in Sierra, where Joe explained that while the API implementation solved the initial problem of missing MARC records, it created some duplicates. Joe mentioned he would follow up with Judith to understand her reasoning for keeping Overdrive records in Sierra and asked the team if they had any strong feelings about maintaining or deleting these records.

## **Overdrive Catalog Integration Discussion**

The team discussed the integration of Overdrive with the catalog system, with Peggy suggesting a review of previous meeting to-dos. Joe agreed to follow up with Judith about keeping Overdrive in the current location. Stephanie raised concerns about the lag time in Vega updates, which Joe agreed to investigate further. The group also briefly discussed the classification challenges of new Sarah J. Maas books in the A

Court of Thorns and Roses series, noting uncertainty about whether they should be categorized as romance or fantasy.

### **Bibliographic Records Duplication Issues**

Stephanie raised concerns about the excessive number of bibliographic records appearing in Vega for popular book series, particularly noting issues with the "A Court of Thorns and Roses" series and the "Diary of a Wimpy Kid" books. She proposed sending specific bibliographic numbers to III to address the problem of multiple search results for the same book, as this creates confusion for patrons. Anne confirmed that this issue affects staff as well, and Joe agreed to create a support ticket with III to investigate the problem and propose solutions for streamlining the records.

### **Cataloging Practices and Data Quality**

The team discussed cataloging practices and data quality issues. Stephanie requested more examples of problematic tags from III to improve their editing process and reduce monthly tickets. Anne asked about proper handling of 245 and 246 fields when book titles contain numbers, and the group clarified that cataloging should follow what appears on the physical book.

Peggy from Colonie announced that Sarah Wilson, a library school student, is interested in cataloging and will be interning in Technical Services over the summer.

Lisa Bouchard from East Greenbush introduced herself as the part-time catalog librarian, for the benefit of people new to the group. Lisa usually works Monday through Friday from 9-1 and attends our monthly cataloger's meetings. Lisa invited anyone with a specific question for her to send an email.