

## **Cataloging Advisory Council minutes - June 4, 2026**

**[Zoom summary edited by Joe]**

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

### **Meeting summary**

#### **Quick recap**

This meeting focused on reviewing action items from the previous meeting and discussing ongoing issues with the Vega library management system. The group discussed the disappearance of OPAC Notes in the new system, with Joe agreeing to follow up with III about restoring this functionality and asking about mapping the message field to OPAC Notes instead. Stephanie raised concerns about cataloging practices in Vega, particularly how Bibframe roll-ups work and what specific field formatting is required to ensure all editions and formats display together properly. The team also addressed issues with On-order records not being visible across all libraries and discussed keeping Overdrive records in Sierra despite some libraries dropping Hoopla. Additional topics included recent staff changes at Ravenna library and the need for digital librarian positions, as well as updates on fiscal close procedures for different libraries in the system.

#### **Next steps**

##### **Anne**

- Check with Sylvia (and/or relevant staff) to confirm if OPAC Notes are printing on the pull list, and if so, send setup details to Stephanie.

##### **Joe**

- Reopen and reframe the question with III about the return of OPAC Notes functionality, and specifically ask if the "Message" column in Discover can be mapped to pull from the OPAC Note field instead of the current OPAC Message field.
- Ask III for specific criteria (including required fields, punctuation, and formatting) for how roll-ups are generated in Discover, particularly regarding the 100, 245, and any other relevant MARC tags, and request a template or rubric for cataloging practices to ensure all formats/editions roll up under one record.
- Inquire with III if On-order records from the Acquisitions module can be made visible in Discover, to assist staff and patrons in identifying which libraries have items on order.

- Investigate and, if possible, adjust the timing of the full MARC sync between Sierra and Discover to allow for faster visibility of changes, and communicate with the group about the results of this experiment.
- Send out information to the group about membership and subscription to the Innovative User Group (IUG), as requested by Kathleen.
- Share any responses received from III regarding roll-up criteria and field mapping with the group, especially during the June lull when processing/fixing is ongoing.

### **Stephanie**

- Send email to Phil and Kathleen (and possibly Lisa Thomas) regarding fiscal close procedures and any related Sierra issues.

### **Summary**

#### **Digital Librarian Recruitment Update**

The meeting began with technical issues as Anne had audio problems and Rob was unable to attend due to an emergency. Stephanie informed the group that RCSC lost their full-time digital librarian Jill, and Lisa (director) is actively recruiting to fill the position. The team then reviewed action items from the previous meeting, with Joe planning to share notes and review commitments.

#### **OPAC Notes Status Discussion**

The team discussed the status of OPAC Notes, with Joe indicating he would reopen the ticket with the help desk to clarify whether OPAC Notes would return. Anne explained she had been using OPAC Notes for holiday items but had to recatalog them manually after adding holiday names to call numbers. The group also explored the possibility of using the Message column as an alternative to OPAC Notes, but discovered that the message field only allows for "none" or "rental" options and is populated from the item record's OPAC Message field, which doesn't provide flexibility for custom messaging.

#### **OPAC Message Field Solutions**

The team discussed issues with the OPAC Message field in their library system, where currently only "rental" appears as an option. Joe agreed to ask III about two potential solutions: whether additional values could be added to the dropdown list beyond "rental," and whether the system could map to OPAC Notes instead of OPAC Message. Anne agreed to check with Sylvia about whether OPAC Notes are currently printing on pull lists and will share the setup if confirmed.

### **OPAC Notes and Lending Rules**

Stephanie clarified that OPAC Notes in Encore were used for additional information about item location and lending rules, but the note field (500 tag) is now buried in the details page and less useful. The group discussed how to handle lending rules for Library of Things materials, with Carrie confirming they prefer items be returned to the borrowing branch rather than the home library. Stephanie suggested using a check-in message for lending rules and proposed using the summary field instead of the 500 note for a more prominent display of return instructions.

### **Loan Information Display Strategy**

Stephanie and Carrie discussed using field 520 in the catalog to display loan information for telescope equipment, suggesting it would make Due Dates more visible to patrons. Stephanie noted this approach might be considered improper use of the 520 field but would ensure important information is front-facing for both staff and patrons. They also discussed the broader issue of unclear loan rules across Library of Things collections, with Stephanie observing that many libraries don't clearly display key information like Due Dates and fine policies on their websites.

### **Telescope Loan System Display Issues**

Stephanie and Carrie discussed challenges with displaying information about telescope loans in the library system, particularly regarding the 520 field and making items easily findable for staff and patrons. They explored potential solutions including making telescope items non-requestable and adding explicit information to item records, though Stephanie noted this would break system rules. The conversation also touched on similar issues with Manga records, where Stephanie explained her decision to stop merging Shonen Jump as a series title to improve patron experience.

### **Library Catalog System Challenges**

Stephanie discussed challenges with the library catalog system, particularly regarding On-order records visibility across different libraries and the impact on both patrons and staff. Joe recommended that Stephanie join the Innovative User Group (IUG) and attend their annual meeting to connect with III representatives about the Discover system. The team also discussed a failed experiment regarding the 24-hour lag between Sierra and Discover systems, with Joe planning to explore alternative solutions for real-time or hourly syncing.

### **Digital Content Cataloging Practices**

The group discussed why some digital content sets appear in Sierra while others don't, with Stephanie explaining that the e-content committee removed Hoopla from Sierra due to multiple libraries dropping it, while OverDrive remains because all libraries use it. Stephanie raised concerns about cataloging practices in III, specifically asking for

clarification on how bib frame roll-ups work and what specific field requirements are needed for proper record merging. The team also discussed the "request any edition" feature in Sierra, clarifying that it actually refers to "any copy" from the currently selected tab, and Joe agreed to follow up with III about the roll-up specifications that Stephanie requested.