

Marmot Union Cataloging Committee

Wednesday, August 22, 2018

Minutes in blue text

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|---|------------------------------|---------------|--|---|------------------------------|------------|
| X | Jamie Walker [Chair] | CMU | | | Tami Hicks | Lake Co |
| X | Mary Walsh | Adams State | | X | Betsey Dick | Mesa Co |
| | Gail Owens | Basalt | | X | Shelly Fratzke | SD#51 |
| | Nancy Trimm, Robin Trehaeven | Bemis | | X | Wendi Weinstein | Pine River |
| X | Nina Darlington | Bud Werner | | X | Carol McArdell | Pitkin |
| | Kim Grindrod, Jan Quick | Buena Vista | | | Debbie Barnes | Rampart |
| | Oliver Schulz | CCU | | | Becky Nelson, Kristin Trombo | Salida |
| | Amy Currier | CMC Glenwood | | X | Sarah Nordholm | Summit Co |
| | Chris Bockstiegel | CMC Leadville | | | Jo Norris | Vail |
| | Jonathan Beam | CMC Steamboat | | X | Nicole Becwar | WSCU |
| X | Diane Levin, Jolanda Durbin | Eagle Valley | | | Amy Sieving, Alison Farnham | Wilkinson |
| X | Selene Gardner | Englewood | | X | Tammy Poquette | Marmot |
| X | Lara Aase, Tyler Dunn | FLC | | X | Lloyd Chittenden | Marmot |
| | Amy Shipley | Garfield Co | | | Brandon Cole | Marmot |
| | | Grand Co | | | Adam Murray | Marmot |
| | Jennifer Hillebrandt | Gunnison Co | | | | |

Announcements

- New Marmot Director Adam Murray
 - Adam Murray has started as executive director of Marmot. His email is adam@marmot.org if you want to contact him.
- Sierra 4.0 upgrade planned for September 5th
 - We are looking at the very early morning of Sept 5 for the Sierra upgrade. Let Brandon know if this time would be a problem for you.
 - Brandon sent out release notes.
 - The big expansion of I-types is happening in this upgrade. 4.0 will allow 2000 Itypes.
 - Marmot will start looking at the opportunities from more I-types, but that will be driven by circulation issues, so it will probably start in ASC.

Completed action items

Completed Reindexing Project

- Change 690 and 691 fields from field tag d to field tag v in the d-tag subject index.
 - Nina reports that these are working correctly. The v tagged subjects now move to new bibs with attached records.
 - We should make sure that all our load profiles will add these fields to the correct field group tag.
 - *Lloyd will edit the load profiles so they will put these fields in the correct tag.
 - We need some training/documentation so people know to put these fields in the v field group tag.
 - *Lloyd will add this to his periodic tasks to check for these fields in the wrong tag and fix them. People will probably continue to use the old one.
 - *Lloyd will check if the MARC tag validity table can be set to make these show as invalid if they are in the wrong field group tag. [Checked, and no it can't. The idea has been entered in Idea Lab]
- Move the 019 \$a from the i-tag ISBN index to the o-tag OCLC index.
 - This will effect matching on record loading and in headings reports.
 - We check headings reports, but we can't tell if any of those dups result from this change or not.
- Create a new index tag v for the 020 \$a. Leave the 020 currently in the i-tag ISBN index as is.
 - The new index only works for matching record loading. It does not appear as an option in Sierra. The load profiles have been adjusted to match on this new index, while searching ISN in Sierra will still search the old index that includes 020\$a.
 - Because of this is actually matters that invalid ISBNs actually get in 020\$z because that will prevent them from being matching on in record loading.
 - Pika's ISBN search only searches 020\$a. It has always worked that way.
 - The ISBN search in the classic catalog searches the old index including 020\$z and 028.
 - Jamie points out that the new index can be searched with the classic catalog at <http://sierra.marmot.org/search/vSEARCHTERM>

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| <ul style="list-style-type: none"> • Remove the \$0, \$1, and \$4 from the phrase indexing for bib records. <ul style="list-style-type: none"> ○ We check classic catalog and subject browse is working as we want. The \$0 fields are no longer interfering. • Create a new index tag w for patron birthdate, phone, phone2, and email. <ul style="list-style-type: none"> ○ This is working. Searches for phone and email currently work. ○ We have not yet figured out how to move the birth dates from the fixed field to the variable field where they will be indexed. Lloyd is working with III on that. |
| <p>Extra load profiles deleted</p> <ul style="list-style-type: none"> • About 20 obsolete load profiles were deleted by III. This makes navigating the profile editor easier for Lloyd. The old profiles have been archived if any are needed again. |
| <p>New records sent to Marcive</p> <ul style="list-style-type: none"> • We sent a set of over 60,000 new records to Marcive for authority control. |
| <p>Marcive notified of deleted records</p> <ul style="list-style-type: none"> • We notified Marcive of over 100,000 deleted records so those will not appear in future authority updates. |
| <p>Record numbers in 908 and 909 fields removed</p> <ul style="list-style-type: none"> • As we discussed in the last meeting these numbers were unnecessary and possibly misleading. They have now been removed. |
| <p>Deleted leading zeros in BIB UTIL numbers</p> <ul style="list-style-type: none"> • Lloyd realized that we had thousands of records with leading zeros in the 001. Leading zeros should be removed by the load profiles, but for some reason these were not. Most of them seemed to be from 2006. Lloyd figured out a way to remove the leading zeros without removing all the zeros. These numbers should now match in headings reports and record loading. |

Discussion Topics

- Sierra checking for duplication on new records. We can change this setting.
 - Sierra will check for duplicate records whenever you create a new record. It is currently set to check against ISBN and titlekey. Lloyd realized that we have the option of turning this behavior off. When he was a cataloger this was always very annoying because it almost always found hits that were not actually matches because we do manual searches for duplicate records before we add new records. Lloyd suggests that we change our settings not to do this check.
 - Someone points out that they find the barcode check valuable for new records.
 - This would only be bib records. We would continue checking barcodes for new items and patrons.
 - We do have to option of having it stop checking on the titlekey and still check on ISBN.
 - People are generally positive about the idea.
 - Jamie suggests that we let this suggestion wait until the next meeting before implementing any change so people can think about it.
 - ***Lloyd** will bring this back for a final decision at next month's meeting. Please contact him if you have comments or questions about this.
- MUG presentation on special formats/collections?
 - We currently have an open spot for a presentation at MUG. Betsey told us that she would be interested to hear from sites that are cataloging and circulating unusual items like tools, musical instruments, seeds, lift tickets, bicycles, etc.
 - One site has said they might be able to do that but they are only doing two special things and can't fill a whole session.
 - We start to discuss other ideas for this session.
 - Some people would like to see Lloyd's session on regular expressions again.
 - Some people would like a session on using MarcEdit.
 - ***Tammy** will put out a poll to see which of those two options is more popular.
- Disc combos in Pika BD/DVD, UDH/BD
 - At our last meeting we talked about the way pika deals with sets that combine BluRay and DVD discs. We decided to ask R&D if they can make Pika display these in both the BluRay group and the DVD group.
 - Lloyd has now realized that there is a new type of combo, UltraHD/BluRay Disc. We talk about how we want these to behave in Pika. People want the same behavior as the BD/DVD combos.
 - Jamie mentions that there are also 3D/2D disc combos.
 - We find that there are some of these in the collection, but there does not appear to be any facet for 3D videos.
 - 3D is a characteristic that might be on a BluRay or UHD disc.
 - Since these require different equipment to view them, we think they need to be searchable and clearly displayed. There should be a 3D format facet and these combos should function the same as the others.
 - ***Lloyd** will add these points to the YouTrack ticket about disc combos.

- **Bad diacritics in list 79**
 - List 79 in Create Lists contains over 4,000 records with bad diacritics that have snuck into our system over the years.
 - Most of these would be fixed by overlaying them with new records from OCLC.
 - Jamie says he will try to overlay all of those that CMU are attached to with a batch load from OCLC.
 - Anyone else who knows how to do that is welcome to do so.
 - A few of these will actually have bad diacritics in OCLC, but most should be fixed by an overlay.
 - *Lloyd will send out an email explaining this issue.
 - If you want help setting up an OCLC batch load to clean up those you are attached to, contact Lloyd.

- **Idea Lab documentation**
 - Idea lab is the process III has put in place to help them decide what enhancements they should consider adding to Sierra and Polaris.
 - At the last meeting we talked about trying to use our numbers to get enhancements we want through the process.
 - Tammy has now finished documentation on how to sign up for and use Idea Lab.
 - Any of us can sign up and start voting and commenting on ideas.
 - We look at some of the ideas Lloyd has already posted to see if there is one we want to focus on first.
 - We decide to push the idea to improve management of system generated review files.
 - *Lloyd will send out information about this enhancement idea so people can go vote for it.

New Action Items

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| Edit load profiles so they correctly load 590, 690, and 691 into the new v field group tag. | Lloyd |
| Start periodic check of 590, 690, and 691 that they are in the correct field group tags. | Lloyd |
| Check if the MARC tag validity table can show bad MARC/field group tag combinations. | Lloyd |
| At next UCC meeting bring back the discussion on automatic duplicate checking when creating new records. | Lloyd |
| Send out a poll about which MUG presentation people want. | Tammy |
| Add info about UHD and 3D discs to YouTrack ticket about disc combos. | Lloyd |
| Send email about bad diacritics list in review file 79. | Lloyd |
| Send out info about the Idea Lab idea we want to promote. | Lloyd |

Ongoing Action Items

| Action | Responsible parties |
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| Figure out how to copy Garfield birthdates to variable field. | Lloyd |
| New export profile for 538 field for CMU last copy project. | Lloyd/Jamie |
| Update cataloging standards document, bring updated version of it back to the UCC, and get it up on the web page. | Lloyd |
| Grouping meeting with R&D. | Duplicates Committee/R&D |
| New duplicate checker. | Duplicates Committee |

Duplicates Sub-committee meeting: Sept 12

Reindexing Sub-committee meeting: Sept 12 final meeting to evaluate reindex

Next UCC meeting: September 26, 2018, 9-11 am MT