Marmot Union Cataloging Committee
Wednesday, November 20, 2019
Minutes

X	Jamie Walker [Chair]	CMU		X	Betsey Dick, Lisa Solko	Mesa Co
X	Mary Walsh	Adams State			Susan Hartman, Mary Paladino	Montrose
X	Steven Weiler	Basalt		X	Shelly Fratzke	SD#51
X	Robin Trehaeven, Juliana Van Pelt, Carol Harvey, Cindy Young	Bemis		X	Wendi Weinstein, Lydia Wacasey	Pine River
	Nina Darlington	Bud Werner		X	Carol McArdell	Pitkin
	Melissa McCain	Buena Vista			Debbie Barnes	Rampart
X	Oliver Schulz	CCU			Becky Nelson, Kristin Trombo	Salida
X	Becky Kramer, Chris Cook	CMC Glenwood		X	Sarah Nordholm	Summit Co
	Liz Miller	CMC Leadville		X	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	Tyler Dunn	FLC		X	Lloyd Chittenden	Marmot
	Amy Shipley	Garfield Co			Ashley Sneesby	Marmot
X	Tallie Gray	Grand Co		X	Pascal Brammeier	Marmot
	Jill McKinney	Gunnison Co			Brandon Cole	Marmot
	Stacy Contreras	Lake Co			Adam Murray	Marmot

Announcements
- 3 of our discovery partners are leaving Pika for discovery services from ByWater.
- Lloyd attended the Charleston Conference. It is focused on acquisitions and electronic resources for academic libraries. Lots of information scholarly communication and the publishing industry. It is a valuable conference for people in that type of job. However, it never leaves Charleston, so it can be difficult to travel to.
  - Lloyd learned that the Internet Archive is buying Better World Books. They are interested in BWB as a source of material to scan for their archive. They are trying to scan all books. They are putting one copy of every book they scan on-line to check out by one user at a time. It is not clear that this is legal for newer works, but they are going to test it.
  - Lloyd met with Jeff Tamblyn from the Academic Libraries Video Trust which is an organization of academic libraries who are digitizing VHS videos and sharing them. Any ALVT member who owns a VHS that another ALVT member has digitized, can get a digital copy to replace their VHS.
  - Lloyd met with Sabastian Hammer from Project ReShare. ReShare is developing an open source system that would function like Illiad or Inn-Reach. It would allow peer to peer resource sharing. That means that each library acts as a node. When a book moves from one library to another those two nodes communicate to manage the transaction without any centralized system. This would allow for a library to easily be members of several consortia at the same time, such as Marmot and Prospector and Swift. What group you are in doesn't really matter to the transaction. The consortia may manage moving the book from one library to the other, and may maintain a joint catalog, but the transaction is just those two libraries. It is an interesting system and it is being developed to operate with Folio, but also other systems.
- This morning Lloyd attended a Folio meeting via Zoom where he learned about an open source system used in Sweden that might be adopted as a centralized cataloging system if we used Folio. Chalmers University in Sweden is the first one to go live with Folio. They are doing their cataloging on the central cataloging system for all of Sweden called Libris. They only download enough information into Folio for circulation. The MARC records stay in Libris. The public catalog comes from Libris. This seems like a plausible model for a consortia on Folio. We could do all the cataloging on a central system like Libris, while each library would run their own instance of Folio for local circulation. Pika could build the public catalogs from the data in Libris. We could use ReShare for resource sharing. Libris is open source, so it is possible we could make use of it.
- Lloyd is planning to attend the WOLFcon conference in January. This is the conference of the World Open Library Foundation, which is the organization building Folio. It is in Texas. It will be an opportunity to learn more about Folio.
- Tallie asks what we think is the time frame for Folio/ReShare?
  - The time frame is probably years. Right now there is only one library globally that is actually using Folio as an ILS. There are no consortia using it. It is being built for academic libraries. There are 5

universities planning to implement in 2020. There are no other public libraries involved in the project yet. There is no scoping functionality built yet. None of the functionality needed to operate a consortium is built or even really decided on yet. That has the advantage that we can participate in determining on how it gets built.

Completed action items

Update Cataloging Standards to require 245 in all records, bring back to UCC	Lloyd	• Lloyd added a line to the Marmot Cataloging Standards document stating that a 245 field is required for all records because the non-MARC title field does not operate correctly in Pika. The committee agrees to this change. • We talk about the possibility of creating a minimum cataloging standard for equipment records. Jo suggests a record template to describe the minimum equipment record. • Lloyd will do a global update to change all non-MARC titles to 245 fields so they will work in Pika. **<<ACTION ITEM** • Lloyd will write guidelines for cataloging equipment to add to the cataloging standards document and bring the change back to UCC. **<<ACTION ITEM**
Load Montrose OCLC 001 numbers from their Horizon system for our records that don't have OCLC numbers	Lloyd	Completed
Decide on term for Wonderbooks etc.	Duplicates Team	On agenda for discussion.
Experiment with Lion King grouping	Ashley	On agenda for discussion.

Discussion Topics
- Pika Lion King grouping
  - Ashley experimented with changing the way we are doing Pika grouping for movie remakes like The Lion King and Aladdin. Currently we ungroup these by removing the new movie from the group record.
  - This leaves the old movie as the primary record that comes up first on the hit list and the new movie is separated into several records that end up lower on the relevancy ranking.
  - The new method is to remove the old movies from the main record, leaving the new one as the main record.
  - We search for these on the test server and it results in the new movie being the first hit on the results list. The records for the old movie become ungrouped and split up by format.
  - People prefer this display because patrons are more likely to want the newer movie. However it does make it harder to search for the old version.
  - Tammy thinks she can make the old version regroup into a new group. Pascal said in a meeting last week that they can't be regrouped.
  - Tammy will see if she can get it to work on the test server for these movies. **<<ACTION ITEM**
  - Julie points out on chat that there is a bit in the 008 to code for live action or animation. Maybe that could help with grouping.
  - That might help with the Disney situation, but not the ongoing issue of movie remakes that are all live action. It would be easy to implement. It could be another grouping factor, like the new language grouping factor.
  - Robin suggests using pub date.
  - Dates are very messy. The only date that is consistent is 046|k, and that is not frequently used.
- Issues of Illegal aliens heading
  - Juvenile headings?
  - Related headings?
    - Children of illegal aliens
    - Women illegal aliens

- - - Alien detention centers
    - Aliens
    - Alien property
    - Illegal aliens in literature
    - Illegal alien children
    - Alien criminals
    - Alien labor
  - FAST, others?
  - Marcive said that they can set their system so that if our system has "Undocumented Immigrants" they will leave it alone and not flip it back to the LCSH. They won't flip it but they would leave it alone if we used Sierra to flip them.
  - It is a problem that when LC finally gets around to changing these headings if we have non-standard headings ours may not change to the new LC heading.
  - The ALA Subject Analysis committee is doing a survey of what different libraries are doing about subject. They are expected to release a report at Midwinter in January. Lloyd asked them to send him a copy of the survey results.
  - Some of these headings are repeated as juvenile subject headings, so if we do this we will want to account for both LCSH headings and AC headings.
  - There are actually several terms that include this terminology listed above in the agenda.
  - We would need fake local authority record to flip the headings and make sure that Marcive won't flip any of them back.
  - There are in this category that we don't have any books on. We don't have anything in our collection about illegal aliens in literature, but we might get one, so we might want to account for it.
  - Lloyd is thinking that this looks like more work that we realized previously. He would like to put together a conceptual proposal to bring to directors rather than doing the work first. We need to know if they want us to do this.
  - We could do a test. We could create a fake local authority record and a fake bib record to see how Sierra actually behaves. **<<ACTION ITEM**
  - Jamie points out that the Library of Congress responds to Congress and Congress could change next year. At which point LC might decide to fix this. It might not be worth a lot of our time when it might get fixed in a year or two.
  - Lloyd thinks we could do this with 10 local authority records to flip our headings.
  - The problem with using authorities to flip our headings is that Pika does not use the see references in authority records. Pika will only search on the terms in the bib records. Whichever term we choose to have in the bib records is the only one that will be searchable in Pika.
  - We look in Google trends to see which term is being used more commonly. Google searches are very nearly equal for both terms in the last year.
  - We invite Pascal into the meeting.
  - We talk about how we might do this in a test server version of Pika. We could export the records from Sierra and perform find and replace in MarcEdit then load the records into the Pika test server.
  - Jamie suggests that MarcEdit might allow you to include both headings in records.
  - We could put one of these terms in 690 fields, then they would both be searchable, but that does not solve the problem for those who thing the term Illegal aliens in pejorative and they don't want it to appear.
  - Lloyd says that he could set the load profiles so they would insert an Undocumented immigrants heading each time sees Illegal aliens, then new records would have both headings. Existing records could be updated with global update.
  - We talk about the possibility that Pika could have an option to hide one set or the other so each library could decide which one they want to use. If the records had both, they would both work for searching.
  - Currently the 690 field is included with other Subject headings in the Pika topic facet. Changing that would require more programming.
  - Very few patrons would notice what headings are buried in the record display.
  - Jamie points out that if we put it in a 690 with a particular indicator it would be easy to control display in VuFind separate from other 690s. However, VuFind is already using the authority records, so it would use the see references from any local authorities we added.

- o Jamie suggests that we could improve searching by including the extra subject headings and wait to see if LC will fix this problem any time soon.
  - o Robin chats that he would still like us to try to deal with the problem of having a pejorative term.
  - o Jamie suggests you could put both in 650. You could use 650 second indicator 7 for local subject term.
  - o Jamie suggests we compile a list of options. **<< ACTION ITEM**
  - o Maybe we need to get direction from the Marmot Directors before we get too far into this.
- Read-Along Books and Read-Along eBooks
  - o While looking at the read-along book question, the Duplicates Committee discovered another new format the electronic read-along book. We have these from overdrive. The committee suggests we create a new Pika format facet called Read-Along eBook.
  - o We liked the term "Read-Along eBook" because it would sort alphabetically with "Read-Along Book."
  - o These are in Overdrive, but they may be available from other vendors too.
  - o In Overdrive they are designated as both Kindle Book and Overdrive Read, which is confusing. This leads Pika to list format as (Kindlebook, OverDrive Read). However it is in the ebook format facet.
  - o Pascal says they have already created the Read-Along Book format facet on the Pika test site for Wonderbooks. We look at this on the test server.
  - o Pascal reminds us that there are was another set of books like this from Unite for Literacy. We find there is one of these titles in Pika.
  - o Pascal will investigate Read-Along eBook facet. **<< ACTION ITEM**
- Update on EDS extract
  - o Lloyd is working on trying to use Sierra Scheduler to export files for EDS.
  - o Scheduler has not been able to export large files however.
  - o Lloyd found out that it is the translation map that makes this hard for Scheduler.
  - o Almost all of our exporters use a translation map to add the OCLC number prefix back into the 001, but the CMU exporter does not do this. Lloyd realized that this is why Scheduler can export the entire CMU record set. It might be possible to export all the EDS records this way if all the EDS users don't mind not having the OCLC prefixes.
  - o Chat question: Is this the diacritics issue?
    - ▪ No, this is not the diacritics issue. The diacritics problem was created by the location splitter script that Mark wrote. We think that has been fixed.
  - o We are working on this because we want to replace the full Pika export in review file number 2. That export is no longer used to send records to Pika. It still sends records to EDS and for SD51's vendors. If we can replace that full export, then we could repurpose some of the 2.2 million records for other review files.
  - o Lloyd is hoping that he can have Scheduler export all the records for the EDS users, CMU, FLC, ASU, and Western and SD51 and Vail's vendors if it does not add the OCLC prefix back.
  - o Lloyd will experiment with exporting the EDS file with Scheduler excluding the OCLC prefix. **<<ACTION ITEM**
  - o The question for EDS users is whether there is any reason for the prefix in EDS.
  - o Oliver mentions that CCU is also using EDS, but he doesn't know how his records get there. They are probably also included in the location splitter. Oliver thinks Shane at CCU might know.

New Action Items

Experiment with creating a file for EDS extract without the OCLC prefix.	Lloyd
Investigate new Pika format facet for "Read-Along eBook"	Pascal
Compile list of options for Illegal Aliens issue	Lloyd
Create test MARC record and fake authority record to see how Sierra behaves	Lloyd
Experiment with regrouping previously ungrouped records in Pika	Tammy
Global update to change all non-MARC titles to 245 fields so they will work in Pika	Lloyd
Develop proposal to change Illegal Aliens term in Sierra and check with Marcive	Lloyd

Ongoing Action Items

Action	Responsible parties
Figure out how we can control Prospector display with ITYPE	Lloyd/Brandon
Automate loading of Garfield birth dates	Lloyd
Develop cataloging training materials	Tammy/Lloyd
Develop flow chart for how to use the volume field	Lloyd
Figure out a process for authority control for FLC's discovery records	Lloyd
Investigate a new Tableau utility for finding bad volume field use	Lloyd/Brandon
Develop documentation for Marquis macro	Lloyd/Tammy
Create training for the duplicate checker	Lloyd/Tammy

Next Duplicates Sub-committee meeting: Jan 8
Next UCC meeting: Feb 26 (skipping January because Lloyd will be at WOLFcon)