Marmot Union Cataloging Committee
Wednesday, Sept 23, 2020
Minutes

	Jamie Walker [Chair]	CMU	X	Betsey Dick, Lisa Solko	Mesa Co
X	Mary Walsh	Adams State	X	Mary Paladino	Montrose
	Steven Weile	Basalt	X	Shelly Fratzke	SD#51
X	Robin Trehaeven, Juliana Van Pelt, Carol Harvey, Cindy Young, Mary Miller	Bemis	X	Wendi Weinstein, Lydia Wacasey	Pine River
X	Nina Darlington	Bud Werner	X	Carol McArdell	Pitkin
	Karen Johnson	Buena Vista		Debbie Barnes, Catherine Shepherd	Rampart
X	Oliver Schulz	CCU		Becky Nelson, Kristin Trombo	Salida
X	Becky Kramer, Chris Cook	CMC Glenwood	X	Rebecca Kane	Summit Co
	Liz Miller	CMC Leadville	X	Jo Norris	Vail
	Jonathan Beam	CMC Steamboat	X	Nicole Becwar	WSCU
X	Leah Morris	Delta Co		Amy Sieving, Alison Farnham	Wilkinson
X	Diane Levin, Jolanda Durbin	Eagle Valley	X	Tammy Poquette	Marmot
X	Selene Gardner	Englewood	X	Lloyd Chittenden	Marmot
X	Tyler Dunn	FLC		Ashley Sneesby	Marmot
	Amy Shipley	Garfield Co		Pascal Brammeier	Marmot
X	Tallie Gray	Grand Co		Brandon Cole	Marmot
	Jill McKinney	Gunnison Co		Adam Murray	Marmot
	Stacy Contreras	Lake Co			

Announcements

- Delta County is scheduled to go live Dec 16.

Completed action items

Write a proposal for Lisa's suggested record change note for the Cataloging Standards	Lloyd
Create YouTrack ticket for more accurate running time grace period calculator.	Lloyd

Discussion Topics

- Changes to Cataloging Standards document
  - https://docs.google.com/document/d/1vdqLfOXDAqCPmD56C6gu0Hp1hcaPBgdfNezlrEoTft0/edit?usp=sharing
  - We look at the updates to the standards document.
  - Added mention of 222 field for journal key title which is in the journal title index
  - Added mention of 229 field for local journal title variant also in journal title index

- - Those are the only fields in the Journal Title index, so you have to use to to make something searchable by journal title.
    - Added new field 998 for local change note. This would be where you can keep information about local changes you have made to records.
    - Also corrected description of where scoping comes from. Previously the document claimed it came from agency, but it actually comes from item level location code.
    - These changes are approved. Lloyd will create a new PDF version and put it on the Marmot web page.
- Nina wants to discuss how people are making available the virtual works of local authors
  - Nina is wondering what other libraries do with virtual works from local authors.
  - These can be stored in the Marmot Digital Repository.
  - Nina asks if anyone hears about how any other libraries are doing this, she would like to hear about it.
  - Tallie asks if she means scanning in paper.
  - No, that's not what Nina ment. Her library puts on a local writing even every year and that made her wonder if others are hosting such writings online.
  - Tallie says they have a similar event, but there is a local writer's group with their own website that hosts the writing.
  - Tammy mentions that Overdrive has a local author's feature that is for this purpose. You could load PDF documents and create a list of them on your Advantage site.
  - Lloyd says this is similar to the universities which might be hosting student papers and theses and such writing.
  - Tyler says that FLC does host student work, and they put it in the Marmot Digital Repository. They also host works by faculty in Canvas.
- New duplicate report form
  - https://docs.google.com/forms/d/1Jvs11kTJ3DcssIMgMszmwGDtkb3JRAW5P_vsnf21MCA/edit
  - Duplicates team talked about creating a form where people can report when they find duplicates in Sierra.
  - This is not intended to replace deduping. It is a method where people can report dupes if they don't have an unscoped login or if they are not confident about how to resolve it.
  - The form is on the website: FOR MEMBERS > Committees and Task Forces > Union Catalog Committee > Cataloging Deduplicates Information > Duplicates Record Report
  - The form is on a new page we created under the UCC page where we put various links about duplicates.
- FOLIO User Stories Gap Analysis
  - https://docs.google.com/spreadsheets/d/1jy4bJfmw7MBwIauw_9Qr-YpG0Y1qTE8DKqvKHWeF8RA/edit?usp=sharing

- We have been gathering the user stories about the ILS. We are investigating FOLIO and we want a means to determine if it has the features we need. So first we are gathering information about what those features are. Brandon set up a google form that many people filled out and the spreadsheet is the result of that.
- We identified a functional area for each user story so we can organize them and dedupe the ideas.
- The ideas collected were mostly complaints about Sierra. People put in what they want from an ILS that Sierra does not have. However, we can't assume that FOLIO has the things we value from Sierra, so we need to make sure that this process also collects the things we like about Sierra.
- What FOLIO will be is very much in the air, but right now we are looking at a structure where everyone has their own server. In that structure duplicates are much less of a problem.
- One of the main reasons we are sharing a server now is that it is a much cheaper way to use Sierra because of III's business model. With an open source system, we no longer have that incentive, so separate servers might make more sense.
- Mary Paladino asks how would separate servers work with Pika?
    - A: Pika can pull records from many different sources, so it would have no problem pulling records from all the servers, or any combination of them to build a catalog, or several catalogs.
- We would have a lot more flexibility if we no longer have the financial constraints. We could decide how we want to cooperate as a consortium based on what works best for us rather than saving money.
- Tallie wants to be sure it includes exporting information from Create Lists.
- We would want to export in a variety of formats, csv, Excel, etc.
- We don't find that in the list, so we add it.
- Tammy points out there is nothing about inventory, so we add that to the spreadsheet.
- Circulation statistics is added.
- Tallie would like to access circulation numbers in Pika because her book vendor links to Pika. She would like this information for collection development.
    - A: Tammy says that information is only on the grouped work in Pika.
- Discussion with Nina about needs for serials.
- Display and sort like global update
- Import patron data from external system like Banner
- Nina points out that we could lose the collection development advantages of sharing a server if everyone were on separate servers. That is difficult in Pika because of grouping. People use Sierra catalog for this all the time.
- Lloyd suggests that maybe a VuFind server could pull together everyone's records for collection development use.
- Shelly suggests a Z39.50 utility that pulls in everyone's records.
- Nina asks what is the disadvantage of sharing a server?

- - - Lloyd: Duplicates is the big problem
    - Nina: but we are dealing with that now
    - Lloyd: It is a constant effort
    - Lloyd: Another reason we would have to use separate servers is because FOLIO does not now have any scoping ability.
    - Lloyd: Another option would be an automatic duplicate clean up functionality.
  - Chat question: What about patron holds with separate servers?
    - That would be dealt with at the ReShare level. We don't know how that would work. It would have to simulate a bib level hold.
    - There are no bib level holds even on a single FOLIO server right now. It can only do item level holds.
      - We add bib level holds and volume level holds to the document.
  - Chat question: Is there a plan to rank these issues? For example getting hold management would be more important than dealing with duplicates.
    - I think Adam has a plan to rank these, but not at this stage.
  - Lloyd says that ReShare may be where we can get collection development information.
  - An advantage of a shared server is shared authority work. Although maybe some don't want to do authority work, and if they were on a separate server they would not have to.
  - Another possibility is that we could have several shared servers rather than 30 separate ones. Maybe grouping based on similarities. We might have a lot more options. We can make our own decisions for how we want to be organized.

Ongoing Action Items

Action	Responsible parties
Work on FOLIO gap analysis document	Duplicates team
Investigate using |0 field to indicate record needs to go to Marcive	Lloyd
Pursue joining Mountain West NACO funnel	Lloyd
Determine details of Illegal Aliens change in Pika	Lloyd/Pascal
Document ways to find music with no language in list 21 language problem list.	Lloyd
Experiment with creating a file for EDS extract without the OCLC prefix.	Lloyd
Develop cataloging training materials	Tammy/Lloyd
Develop flow chart for how to use the volume field	Lloyd

Investigate a new Tableau utility for finding bad volume field use	Lloyd/Brandon
Develop documentation for Marquis macro	Lloyd/Tammy

Next Duplicates Sub-committee meeting: Oct, 14

Next UCC meeting: Oct, 28