

Marmot Union Cataloging Committee

Wednesday, Jan 27, 2021

Minutes

X	Jamie Walker [Chair]	CMU
X	Mary Walsh	Adams State
	Steven Weiler	Basalt
X	Richard Allen, Juliana Van Pelt, Carol Harvey, Cindy Young, Mary Miller	Bemis
X	Nina Darlington	Bud Werner
X	Karen Johnson	Buena Vista
X	Oliver Schulz	CCU
X	Becky Kramer, Chris Cook	CMC Glenwood
	Liz Miller	CMC Leadville
	Jonathan Beam	CMC Steamboat
X	Leah Morris	Delta County
X	Diane Levin, Jolanda Durbin	Eagle Valley
X	Selene Gardner	Englewood
X	Tyler Dunn	FLC
	Whitney Jordan	Garfield Co
X	Tallie Gray, Kim Bunning	Grand Co
	Jill McKinney	Gunnison Co

	Stacy Contreras	Lake Co
X	Betsey Dick, Lisa Solko	Mesa Co
X	Mary Paladino	Montrose
X	Shelly Fratzke	SD#51
X	Wendi Weinstein, Lydia Wacasey	Pine River
X	Carol McArdell	Pitkin
	Debbie Barnes, Catherine Shepherd	Rampart
	Becky Nelson, Kristin Trombo	Salida
	Rebecca Kane	Summit Co
X	Jo Norris	Vail
X	Nicole Becwar	WCU
	Amy Sieving, Alison Farnham	Wilkinson
X	Tammy Poquette	Marmot
X	Lloyd Chittenden	Marmot
	Ashley Sneesby	Marmot
	Pascal Brammeier	Marmot
	Brandon Cole	Marmot

Announcements

- Aims Community College go-live is May 12
- Lloyd taking leave in March and April
 - Lloyd will take paternity leave. He is planning to take off the first two weeks of February completely, the work half time for six weeks, coming back full time in May.
 - We will probably cancel March UCC and duplicates meetings. We will see about April.

FOLIO update

- Consortia SIG
 - SIG representatives and ICOLC representatives met with the ReShare board to discuss the open source bibliographic utility idea. They are very interested. This will probably move from the Consortia SIG to ReShare for further development.
- Metadata Management SIG
 - Stopped development of MarcCat app, focusing on QuickMarc app instead. QuickMarc will be the MARC editor in FOLIO.

- Resource Management SIG
 - Demo of fiscal year rollover they hope to have in Iris later this year.
 - You will be able to roll over open orders.
 - Demo of EDIFACT invoicing.
 - No FTP of invoices, only loading invoices from desktop.
 - No ability to create order records with a MARC load yet, maybe in Juniper.
- Migration SIG
 - They are very unhappy with the fact that there is no software development on migration functionality. They propose to the Product Council that migration functionality get prioritized despite the fact that it has not gotten enough votes.
- App Interaction SIG
 - Learned that GBV (a library network for seven German States) is hoping to run their consortium on a single tenant FOLIO server. This could be a powerful ally for Marmot.
 - Discussion of links between piece records in the Order app and item records in the Inventory app.
- Product Council
 - Cate Bourma left the project. She was the lead Product Owner. She has not been replaced. They are trying to replace her with several part time people.
 - Iris release date moved back to May 3. They claim that Juniper and Kiwi will still be released in 2021. As the system grows bug testing takes more and more time with each release.
 - CU Boulder is hiring 2 new FOLIO developers for two years.
 - Proposal to change bug testing so SIGs do more bug testing during development rather than waiting for bug fest.
 - New FOLIO governance model.
 - Creating a new Community Council to replace the current stakeholders group as the top leadership of the organization.
 - Q&A on new governance on Jan 29.
 - FOLIO Project is currently not funded after July 1.
- Marmot test server
 - <http://foliodemo.marmot.org:3000/> is currently our test server. It is not the current version of FOLIO.
- Nicole asks if Migration SIG is the same as Implementers SIG?
 - No. Implementers SIG is for those institutions that have already implemented or made a commitment to implement on a specific date. Migration SIG is where they discuss the software needed to migrate from a different ILS.
 - Migration SIG is working on a generic migration system. Currently each implementer has developed their own implementation process to move from their specific ILS.

- ByWater is developing an open source migration process. But ByWater is in the Migration SIG pushing for something official to be developed, so it seems like they are not satisfied with their own migration tool.
- Jamie asks what is our timeline for when Marmot might actually use it?
 - Lloyd is planning to start testing out record loading and see how it works.
 - Western has said they plan to implement this year.
 - Nicole says they are waiting for development of things such as scoping.
 - Currently FOLIO does not have scoping. For the time being we would simply keep each library on a separate server to maintain the necessary separation between libraries. We would need scoping to create a single tenant set up.
 - Western also needs Prospector.
 - FOLIO is working on integrating INN-Reach. This is being driven by Missouri State, who has already implemented, but they had to drop out of Mobius to do that. They are very actively pushing on development of INN-Reach and they think it will be working by the Kiwi release at the end of 2021.
 - Lloyd thinks this will be the first implementation of the INN-Reach api on an ILS outside of the Proquest group.
 - It looks like it will happen by the end of year.
- Jamie asks are we expecting to share bib records or have separate servers on FOLIO?
 - FOLIO is working on both tracks. 5 Colleges has implemented a shared server, but they don't need scoping.
 - There is currently no scoping function, so if you need to keep your patrons separate you need to be on a separate server for now.
 - FLO consortia has implemented on separate servers, but this is a problem for requests and holds.

Completed action items

Work on FOLIO gap analysis document

Discussion Topics

- Lisa suggests three order loading procedures:
 - No holds allowed before item arrives
 - New type of dummy item to prevent any holds
 - This situation does not require any changes. People can just not load order records in this case.
 - Allow consortium wide holds while item is on order
 - Use current holdable dummy item
 - Local holds only

- New type of dummy item only allowing local holds. May require a new itype that allows local holds only in every library.
 - Using acq, have order records
 - No itype for all libraries?
 - Not using acq, no order records
 - Different item template with local hold itype
 - Load profile (J) was set up on the assumption that a bib with an order and no item is only holdable in the same library. That is not the case. These are holdable throughout the system.
 - The problem is the case of video games, kits and binge boxes. These are local holds only for everyone. We need a new dummy item for these. Not having a dummy actually makes it holdable by anyone.
 - Tammy asks if we need to update documentation.
 - Yes, the documentation is currently wrong because Lloyd misunderstood how order records controlled requests.

<<Action Item
 - Mary Paladino suggests we create a flowchart to explain this.

<<Action Item
 - Lloyd will talk to Brandon about a new dummy item that would allow local holds by the library that creates it. **<<Action Item**

New Action Items

Create a new itype for a dummy item that will only allow local holds for the library that creates the record.	Brandon
Fix load profile (J) to use this new dummy item.	Lloyd
Fix the documetation for load profile (J)	Lloyd/Tammy
Create flowchart to describe when to use which order record loader.	Lloyd/Tammy

Ongoing Action Items

Action	Responsible parties
Investigate using 0 field to indicate record needs to go to Marcive	Lloyd
Pursue joining Mountain West NACO funnel	Lloyd

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: March 10?

Next UCC meeting: March 24?