Cataloging Standards Meeting

28 September 2018

10:00 AM, Bangor Public Library

Secretary: University of Maine at Fort Kent (Asita)

In person: Cason Snow (UM) Sharon Fitzgerald (UM) Bryce Kundick (UMF) Patrick Layne (BPL) Alisia Revitt (MIN)

Remote: Asita Albert (UMFK) Michelle Greene (UMPI) Ben Noeske (UMM) Mary Saunders (MSL) Jim Roy (MSL) Andrew Roache (LEG)

Elisabeth Phipps (USM) unable to attend, but notes were added to the minutes from her email.

Meeting Minutes:

Agenda

1. Branch coding in the bib record. Use the general code or specific location code? (Cason)

Came up as a conversation with Orono staff. The branch code in a bib record, do we use the general library code or do we use owebb for example. Cason remembers Alisia mentioning using the general code.

Alisia - in bib record some of them are bib level locations, and some are designated item locations. Couple of tables that do clever things - some look at all the attached records, and if x location is listed, it automatically adds a specialized location to the bib. Similarly if oro record is deleted, overnight process would remove oro location. Believe it was done because of scopes. URSUS is more confusing (as compared to Minerva), every location has their own thing. Alisia can pull a table to tell people what goes with what. Welcomes discussion if everyone wants to clear up locations. Also, issues with encore that may have to do with locations. Statistics is another place that can complicate things - if looking at data by bib location (could possibly double count if one item is listed in 2 locations due to scoping).

Sharon asks if there is a best practice? Should we remove extra locations?

Alisia - if we had less locations it would be better. It worked well back in the day, pretty sure now the scope is now just another search term. However, if we removed any locations it would affect the drop-down in URSUS of location limiter search (for example, when you limit the search to UMF, or any other option in the drop-down), they would no longer be available as an option.

Individual campuses/institutions could decide what they wanted to do. Don't want to mix item location vs. bib location ones. Alisia will export a list to share with us. Recommend communicating with public service staff to make sure everyone's on the same page before removing location/scopes.

Encore is location (not scope) currently. Last Alisia heard Albie is working with III as there are issues with Encore. Removing branch locations would affect classic URSUS but not Encore.

2. Mat type 3 (Artifact/Model) and z (Art Original). Could they be repurposed? (Cason)

Discussion at Orono, wondering if mat types 3 or z could be combined, eliminated or repurposed?

Alisia has good news, we got 4 more bib mat types with the latest upgrade.

Cason wanted to see if anyone objects.

Alisia - Statistics module within Sierra is broken, do not trust it, randomly dropping records. Fix will be in next update (hopefully in next month). In meantime need to run a list or get it from the web one. If you need help feel free to contact MIN (submit ticket).

Should run a list to see how many records would possibly be affected by this.

Also keep in mind new mat types how it would affect or help patrons finding materials.

Conversation around the process for proposing new mat types. Between now and next meeting, continue conversation over email (using a shared doc) to contribute proposed new mat types. Plan is to weed down list and then vote on new mat type(s).

3. Deleting order records with paid encumbrances. The current date is 7/2011, so nothing after that date can be deleted. Should we consider moving that date forward?

Augusta was trying to delete order records after 2011, but current date in Sierra is 7/2011, which prohibits deleting the records. Yes, we can move the date forward. Orono uses the full fy plus 6 months, so you always capture a year's worth of payments. Move date to July 2017. This allows the possibility of clearing old order records for those libraries that want to do so.

4. Projects not reflected in stats. Please keep your own notes for projects that are not easily reflected in the numbers on the statistics sheet.

Informational - please keep notes on projects for your directors or whomever you think would benefit from this information, as this information won't be reflected in collective excel statistics sheet.

Bryce - if people want they can add notes off to the side on the shared statistics sheet in google.

5. Statistics sheet. One library noted stats on their form that they did not put in. Please be careful inputting stats.

Be careful and make sure you enter your stats on the right tab. Alisia recommends to make sure sheet is fully loaded before you enter stats as there is sometimes a delay to fully load.

6. Polycom vs Zoom.

MSL - uses Tandberg, however support for Tandberg will end Dec. 31, so they're transitioning to Zoom. People has used it many times and have not had any issues. Zoom is more reliable. Link would be sent out to specific email addresses to conduct meetings via Zoom. Alan.Fecteau@maine.gov - staff encourage emailing him as MSL's next meeting will be using Zoom.

Elizabeth Phipps (USM) - you received my email about why it didn't work for me to attend via Zoom; if we try to use both, it needs to originate through Zoom. I'm fine with either. Our director's preference is Zoom, since Polycom is on the way out and we have a system-wide license for Zoom.

Seems like everyone has access to Zoom.

Bryce added that the directors have asked at least one time per year we all come in person. Pick a meeting we all meet in person each year, in Bangor. Other committees have been experiencing dueling meeting sites, getting to be an issue. Bangor is the central location for the system. Bryce is not sure why this hasn't been shared out yet. Try to set April/May meeting as the meeting we all meet in person.

7. Cason - will bring up that the chair is a rotating position, in order to give the opportunity to someone who wants to take this on. Contact Cason via email if interested.

8. Bryce - another thing directors discussed, committees should be more self-starting, more independent. Not always waiting for a charge from directors. Feel empowered to discuss or drive the discussion or focus. Big picture discussions on what we should be working on and aware of for future cataloging developments. Could be a standing agenda item, or add for future agenda.

9. Patrick - will there be a move to add number search in encore?

Searching number in encore (which is keyword) only works when the call number is exactly formatted. Doesn't work consistently. Encore is always just a keyword search. Can always use this feature in classic catalog.

10. Sharon - another question about encore interface on mobile device. No option to get to classic from encore. Alisia wasn't aware it looks so different on mobile site, recommends submitting a ticket.

11. Asita - issue with Sierra, working in a bib record, when using the insert field function, the pop-up window (if mid-way or further down the record) goes somewhere off screen either partly or fully. Alisia suggestions trying to right click on bar (icon down) click maximize, but doesn't guarantee it. She has dual screens, tried turning off one screen. Asita will investigate further and get help from MIN and local IT.

12. Around the room.

Patrick (BPL) - new director's been here for 3+ months. Lots of books cataloged starting in July because of the start of a new fiscal year. Issue when exporting records, if he clicks too quickly on okay will lock him out. He found a solution, have to put in in 2 times, export (will do it twice), then deletes one. Also, BPL is moving towards gmail (current email server crashes).

Bryce (UMF) - over the summer big book move, emptied out second floor, using the second floor as quiet study space and some select meetings. Popular meeting place, going well. Financially some challenges this fiscal year due to budget shortfall. New interim president, Eric Brown. Will start nationwide search in November. Chancellor recently visited. Grateful for statistics we're keeping because of the current financial situation. UMF will use Orono's ILL services as position vacated will not be filled. Looking to send some staff to Orono for training on digital commons in next few months. Orono also does ILL for UMM (Ben reports it works well for Machias).

Sharon (UM) - We have so few print journals now it resulted in a big empty space. Didn't want empty space on display, brought Dewey materials from annex into the library. Did this selectively, did a usage study and identified titles to bring out of the annex. On the second floor, they now have a reading room. Lots of space for people to study. New president, just started this summer. Just this morning, was contacted to put together list of faculty publications. Want to do a display of these publications. Machias now has a presence on the website.

In terms of cataloging, more electronic and large collections. Lots of loading records. Also doing a mining project for municipal projects in the state. 2013-present is the focus on building for this collection. Search is done on serials side, if not represented in record, goes to Cason for cataloging.

Cason (UM) - Kanopy is a video streaming service, and due to budgeting restraints had to rebuild collection, Cason deleted 19,000 records. Have a list of 1800 records that loaded no problem. All back up and running with Kanopy, with a much smaller collection. Shoutout to MIN, the move to linked item records is a big help (used to be linked on the bib). Bryce says UMF is signed up for Kanopy, what should they be doing? Sharon recommends keeping a low profile, not advertising. Collection not strictly scholarly, anecdotal conversations triggered a title ($150 a pop to lease for one year, not own). Concern over spending money on titles (not owning only leasing) not necessarily being used in the classroom.

Cason - to get records, go to Kanopy dashboard, download records in giant batch, adjust in marcedit, kanopy profile in Sierra when batch load. Or have MIN take care of it.Alisia- MIN needs login link and information to help out. Need to know when/how often records are updated, etc.

Orono recommends item records attached to each bib record. Code copy 0, until purchased, then change to copy 1.

Alisia (MIN) - Encore is out of beta now, still chasing down weird issues. Statistics module is broken, do not trust it. No large scale news. If you have large purchases please involve MIN to the process early.

Encourage people to go to MLA Conference. Important discussions will take place at conference, it will start the discussion, but nothing will be decided yet (in case you're not able to attend). Want to be more systematic about the catalog and future growth. In URSUS there are policies and procedures, as well as authority when issues arise (bring to directors, etc.). However, with Minerva there is nothing comparable, and it's challenging in terms of standards/guidelines when there is nothing in place. Hoping to come up with rules/guidelines for Minerva group. Will be the first in a series of discussions.

Conversation about how holds and queues work in URSUS, while there is no holds/queue in Minerva. In URSUS the library that owns the item always has priority in terms of holds.

Sharon - could a more robust Mainecat system replace URSUS and go toward a statewide system? Alisia - a completely universal system would please no one. Already complicated within URSUS, let alone a statewide system. But yes, they could work together more seamlessly. Will discuss what should be in catalog. Mainecat doesn't have a lot of flexibility, better to be sure before deciding, as it might be quite some time before they can change it again.

Ben (UMM) - pretty good here, spent time training new student workers, not much time for cataloging. New VPAA in, hopeful things will go well. Working with Orono on starting digital commons.

Asita (UMFK) - very busy summer, the downstairs part of the old section of the library was renovated. The tiles were removed (asbestos) and then new flooring installed later. Before this all could be done all the books that were located downstairs was moved upstairs. After the new flooring was installed, all the books were moved downstairs, and upstairs is now quiet study space. Some new furniture in, and another set of new furniture will arrive next week . Looking to get back to work on things that unable to work on due to busy summer.

Jim (MSL) - about a month ago new reference librarian, B.J. (did not catch last name), replacing retiring librarian. Speciality in genealogy and general reference too.

Mary (MSL) - continuing with cataloging projects, and state documents collection. Also work on cataloging other maine related items (maine authors, materials related to Maine, etc.). The work continues.

Andrew (LEG) - not too much change, still negotiating out contracts for digital materials. Decisions around what to keep with regards to physical or digital formats.

Michelle (UMPI) - they have a temporary staff person, they were able to extend the position to Jan/Feb. Hope to keep her longer, want to evolve into a permanent position. She works nights/weekends. During the summer finished cataloging juvenile collection (a couple years ago it was removed from the library, then it was decided this summer to move it back to the library). Had to re-catalog all these books, just finished a couple weeks before fall semester start. Also going through items in special collections, decide what to keep (and not) and catalog those they'll keep.

Elizabeth Phipps (USM) - I have been busy creating lists for our first ever shelf reading project in Special Collections. Thanks to Maine Infonet staff, especially Albie, for assistance as I created lists for our collections.

In other news from USM, Osher Map Library received a very large gift from Dr. Harold Osher in June. You may have seen the Portland Press Herald article: https://www.pressherald.com/2018/06/22/usm-receives-gift-of-450000-maps-valued-at-100m/
History professor Elizabeth Bischof will be the first Executive Director of OML.

NEXT MEETING - (Zoom meeting) Feb. 22, 2019   Snow day March 1, 2019