

**Montana Shared Catalog  
Cataloging Committee Meeting Minutes  
March 11, 2010  
Livingston-Park County Public Library**

**Attendance:** Dave Shearer, Parmly Billings Library; Jess Tobin, Montana State Library; Suzanne Goodman, Park High School Library; Marilyn Trosper, Polson City Library; Janice Kalvig, Flathead County Library System; Paulette Parpart, Missoula Public Library; Lois Dissly, Bozeman Public Library; Mary Fouts and Ken Adams, Montana Shared Catalog, Montana State Library

**No Match List for New Libraries:** Beginning with Joliet Public Library, when items are loaded for new libraries, Sirsi will create a list of titles that did not match. Approximately 10% (or 1000 items) of Joliet’s collection did not match. After discussion, it was decided that someone on the clean-up group should take a look at this list and experiment with it to see if working from this list would be a good way to manage the clean-up after new libraries are loaded; then a recommendation could be made for how this list should be handled in the future. The Catalog Committee endorses the idea of cleaning up the catalog on a regular basis.

**949 Tag and Superfluous Tags:** There was discussion about the need to remove tags that may appear to be unnecessary and may be taking up space on the hard drive. Ken says there is not a problem with storage space on the servers. For that reason, tags do not have to be removed. If you feel the need to clean up an extremely messy record, tags should be removed with extreme caution as libraries use tags for reasons that might not be clear to the person removing them.

**Holds and Analytics:** There is a need for consistency in the way analytics are added to the catalog. It is very difficult to place a hold if the analytics are not done the same way from library to library. The guidelines need to be revised to include the table (see below) which lists the designations that produce |z automatically. We also need to include in the guidelines that libraries should follow the pattern that has been established for a series. For example, if the first library uses V. 1, all libraries need to use V.1. We need to train new libraries as well as the current membership on how to do this and why it is important. This can be done through the Tip of the Month and also through messages on the discussion list. Mentors can also talk to the libraries they mentor. Ken needs to find out if EP (for episode) and SEASON can be added to this list. There is also a problem with getting the items to sort correctly. Missoula does not seem to have this problem. Bozeman and Flathead sometimes (but not always) have to use spaces (or a zero in front of the volume number) to get the list to sort correctly. Lois and Janice will send Ken screen prints of examples where it works correctly for Missoula but not Bozeman and Flathead.

V.	volume	ISSUE NO.	issue
NO.	number	MONTH	month
PT.	part	YR.	year
ED.	edition	DAY	day
SUM.	summary	ADD.	addendum
PART	Part	AMEND.	amendment
VID	Video	APP	Appendices
CD	Cd	COMP.	compendium
AUD	audio	ATT.	Attachment
KIT	kit		

It was recommended that Ken suggest an enhancement that will resolve some of the problems related to placing holds on multiple volume items. The IBistro screen is very confusing for patrons when they place holds. If they aren't reading it very carefully, they will not realize they were not successful. Ken said upgrading IBistro to Revision D might solve some of the problems. Look at Missoula's catalog to see what Rev. D looks like. This is not a mandatory upgrade because there are a few problems with Internet Explorer, but Sirsi/Dynix is no longer supporting Rev. C.

**Outsourcing:** There seems to be some interest in outsourcing some original cataloging. Items about Montana that are difficult to catalog would possibly qualify for outsourcing. If we want to consider adding outsourcing as a line item, well-defined guidelines would have to be developed, and we would need to investigate the cost and what individuals and/or businesses are available to do this. The Committee decided to try to experiment with 15-20 items over the next 12 months. The Committee seemed interested in finding catalogers in Montana who would be interested in doing original cataloging for the MSC. Paulette will see if there are any catalogers on the U of M staff who might be interested, and Lois will ask Beth Boyson to check with MSU. After experimenting and drafting some guidelines, we would need to present our case to the MSC Executive Committee.

**Vendor Records and School Libraries:** Suzanne has worked closely with Baker & Taylor so she can save steps and time when adding new material to the catalog. Mike Price has also worked with Suzanne so a list is produced at the end of the process that shows which records came in without matches. With this list, Suzanne can check just those records that did not match to make sure there are not matching records. She can then transfer items as appropriate to another record to eliminate duplicates. Suzanne would like to include this information in the cataloging guidelines so other schools can follow a similar process even though they may use another vendor. Suzanne will clean up the instructions and make them more generic and give them to the incoming chair to include in the cataloging guidelines. It was suggested that we have a cataloging workshop for school librarians to explain this process.

**Cataloging Clean-Up Report:** Janice and Paulette reported that the clean up went well. Seven people worked 10-15 hours a week cleaning up about 40,000 titles in 3 months. The more experienced catalogers in the group will continue cleaning up the records of the new libraries that have been added recently. There was some discussion about a way to prevent the transferring of bibliographic records that possibly should not be transferred. The clean up group does not transfer fiction items if the State Historical Society owns the item. They also look closely at the 250 tag before they transfer records. For board books we should make sure there is an edition statement in the 250 tag. Lois will try to have someone at Bozeman Public Library do this as a project. Mike Price also might be able to help using API.

**Revising Cataloging Guidelines:** Suzanne presented a draft of the purpose, membership and meeting guidelines of the Cataloging Committee. Below is the revised draft. Ken said the name of the Committee may be changed by the Executive Committee to reflect the inclusion of people with knowledge about Circulation and the OPAC.

### **Cataloging Committee Statement of Purpose(REVISION DRAFT)**

#### **Purpose:**

The **primary function** of the Cataloging Committee is to promote consistent bibliographic records and cataloging practices within the MSC catalog. The committee is responsible for the Cataloging Guidelines which are regularly reviewed and updated as necessary. The Committee also participates in training and Committee members actively participate in the MSC General Discussion List, the MSC Cataloging Discussion List, and the SirsiDynix Cataloging Discussion List and can make recommendations for enhancements to SirsiDynix based on membership and Committee discussion.

**Membership:**

Cataloging Committee membership consists of 9 up to 12 voting members representing Large and Small Public, Academic, School, and Special libraries within the MSC. *At least one member should be very familiar with the circulation module of WorkFlows, and one member should also have working experience with the OPAC.* The committee can be expanded to accommodate growing MSC membership as necessary. ~~Do we want to put a limit on these based on size of membership? Not to exceed 10% of the number of participating libraries, for ex?~~ Committee members are appointed by the MSC Director according to their interest and experience in cataloging. All members of the Montana Shared Catalog are invited and encouraged to share ideas and problems by participating in the MSC Cataloging Discussion Listserv or contacting a Committee member.

A Chair and Vice-Chair are elected within the committee for one year terms, and are responsible for planning meeting(s) and facilitating discussions and votes. The Vice-Chair serves one year and then serves the following year as the Chair. The Vice-Chair is responsible for updating the cataloging guidelines. Due to the limited number of catalogers in the overall MSC membership, there are no term limits for committee membership. *A member wishing to step down from this committee should let both the MSC Director and Cataloging Committee Chair know of his/her desires. It is highly recommended that a member wishing to step down be able to recommend a replacement member.*

**Meetings:**

A minimum of one in-person meeting per year will be funded by the Montana Shared Catalog. Meetings can also be held via phone or electronically. If necessary, additional funding can be requested from the MSC. Minutes from the committee meetings will be made available to the MSC membership. Recommended action items will be presented to the Executive committee or other appropriate committee for consideration. Annual committee meetings have historically been conducted in late January, but the date is flexible to accommodate schedules. *Consideration should be given to a meeting timeline which allows Executive Committee to act on any recommendation from this committee before the next regularly scheduled MSC membership meeting.*

**Electronic Ordering:** Kathy Mitchell, Missoula Public Library, and Jo Arstein and Amy Fugate, Parmly Billings Library, joined us for discussion about electronic ordering using EDI (Electronic Data Interchange). Using EDI would allow libraries to use the full robustness of the Acquisitions Module. This may require purchasing the EDI Module. Ken will investigate and get a quote. This would mainly affect the large libraries. Parmly Billings is moving ahead with this and planning to have Sirsi/Dynix provide some training. They could request 2 day training and invite other libraries to attend and share the cost or request custom training that pertains to their library.

**Serials:** Examples of how to add holdings to serial records need to be included in the next revision of the guidelines for libraries that do not use the Serials Module. Mentors should do some individual training with libraries that are not doing this correctly. The most current ISBN should be put into the 020 tag of the serial record to reduce duplicate records. It was suggested that the year be removed from the 260.

**Indexing 245 Subfields n and p:** There was general consensus that the 245 subfields n and p should be indexed. Ken will research this and report back to us. Ken will also put a list of what tags are indexed on the webpage.

**Cataloging Guidelines:**

**Genre-**Dave asked about the guidelines for genres. Should the genre be put in the 650 or 655 tag? LC is preferred tagging. When Janice sees a genre in the 655, she changes it to 650.

**GMDs**-A GMD for playaways needs to be added. After discussion, it was decided to go with [electronic resource (Playaway)]. If it is decided in the future that a different GMD should be used, Mike should be able to make the change using API if it is input correctly at this time.

**Smartport**-The screen print showing the Smartport settings (p. 15) should have the defaults that are set by the MSC administrators. Also the search tips section (#7, p. 15) need to be expanded to include information on how to change the search pane view and examples should be included.

**Appendix D**-Appendix D needs to be changed. After discussion, it was recommended that we show how to use the 490 and suggest that catalogers follow the established series heading and follow the pattern for the number. If it is the first in the series, the volume number should not be preceded by an abbreviation. EXAMPLE: 490 1\_ Geronimo Stilton ;v36

**Accelerated Reader**-Currently information about accelerated reader is put in the 526 tag. A suggestion was made to use a public note for this information instead of the bib record. This would make clean-up and transferring records much easier. Problems with using a public note instead of the 526 are that it would not be searchable and each school librarian would have to manually input a note. Suzanne will check with the school librarians on this to find out who is using this information and what features they need.

See also notes in minutes about Smartport, Analytics, Serials, and Vendor Records and School Libraries.

**Authority Maintenance**-Ken announced that we will be down for about 3 days when they extract records for authority maintenance. Watch the discussion lists for more information as he will give plenty of notice and information.

**Incoming Chair**- Jess Tobin is the incoming chair. Janice Kalvig was selected as the vice-chair. Part of the vice-chair's responsibility is to update the cataloging guidelines.

**Cataloging Tips**- Please send cataloging tips in document format so Ken can easily convert them to the webpage. Listed below is the schedule for the next few months:

March	Jess	Authority Control (Annual Maintenance)
April	Paulette	Serials
May	Lois	Table with  z designations & explanation
Summer	Off	
September	Paulette	Series 490 tag
October	Marilyn	Public Notes