**January 16, 2020 -- PKS Cataloging Group Meeting Notes**:

**Agenda**:

* Update on migration activities
	+ New release of Polaris on Monday 1/13/20 – TRN refreshed and upgraded. Check and report any problems. Release notes published on the ODIN website Polaris page.
	+ Overdrive/RBDigital – Overdrive should be working on PAC pages except GFPL and Dickinson (Advantage Accounts) and Hope-Page authentication. RBDigital is ranking by popularity now to better integrate in the search results (State Agencies have elected to not include RBDigital). Discovery Group is evaluating.
		- Overdrive: loading is automatically and as expected.
		- RBDigital: Kristen verified new/updates came in properly a few weeks ago.
* Update on Data Issues & Standards:
	+ Large print and regular print item merging. Questioned if we could match for the 020$a instead 020 but Polaris configuration is not that granular. Future Enhancement Request. In meantime, remove 020 $z if you run across it. Global changes are possible to delete 020 $z. Megan is working on isolating records to apply change.
	+ 100 $e – problems merging properly during author browse if tag is not consistently used. Future Enhancement Request? “Best solution for now is to remove the $e and not use it.” We do **NOT** want to delete the $e. Kristen thought this could confuse patrons when author appears on two lines instead of one when browsing. If it causes problems Discovery Group pursue display change (display 100 $e if it is present or if not, display 100) **Test merging with profiles on TRN server** (and perhaps authorities) now that refresh is done. However, looking at other Polaris sites show multiple entries for authors when they have bib records with tag 100 containing the $e and without $e.
	+ Automatic creation of item records – anyone set up import profile to do this? Yes, NDSL is having issues with call number coming across (configuration was set up to Dewey and updated after the meeting) but everything else was working correctly. Information was being retained in BIB record but not ITEM record. Further issues? NDSL – still not bring over call number (and barcode) libraries also having same issue. **Lynn reported to Ann – looks like another table needs to be configured.**
	+ TD11895183 - Some audiobooks (on CD) have a 506 field in the bib record that says Restricted to PRINT DISABLED Patrons. If library has chosen to limit audiobook collection, that should go on their item record. One example is control number 849976. List was sent to NGF for cleanup of their records. **\*\* Global change possible if exact wording is provided – not the entire 506 field.**
	+ Stacey (NDS) – OCLC number searching in the PAC **\*\* Update: 035 is not an indexed field so would not be searchable in the PAC. Discussed list of fields that are indexed**. Polaris indicated it would have to be a Future Enhancement Request. However, if you run across a Polaris library outside our system that WILL do an OCLC number in the PAC, please let us know and we will try to contact their site admins for procedure.
* New Items:
	+ Record sets – Stacey had a record fail to load but it did not display the control number on log. Ann suggested to use record sets. If you run into problems, report via ticket.
	+ Dealing with skinny bibs in Polaris – Stacey has been helping DIP with backlogged skinny records. She will send out cheat sheet regarding this process.
	+ NGF Bluray/DVD issue – import profile encoding levels – Bobbi & Stacey. Regular DVDs were cataloged one week, Blurays the following week. Bluray records ended up overlaying the regular DVD records when loaded. There are holds on many of the titles so correcting is not easy. Separate import profiles could be set up for each type of material. Provisional records could also be considered. Bobbi will work with Stacey and hopefully report back on what they learn.
	+ Polaris documentation URL and logon info – Linda sent out information via email on 1/16/20. Let us know if you have any problems accessing.
	+ IUG listservs – will likely not be available to us until we transition from Implementation to Support. Watch the odin-pks-libs listserv for details when available.
	+ When deleting the last copy on a bib record, do we want to delete or keep the empty bib record? – NGF -- – ODIN libraries have chosen to not permanently delete bibs immediately so even if the record is in “deleted” status, it would not be purged until a separate job is run. Policy has not been determined for the running of this job but would likely not be more frequently than annual so stats could be gathered beforehand.
	+ If we are deleting the last copy on a bib record and there is another bib record for the exact same item, should we then delete the bib record that our last copy was on? – NGF – see answer above.
	+ When an item record is deleted, Polaris says it will be marked for deletion.  The item still shows up on the bib record with a record status of “deleted” until you repeat the deletion process again and permanently delete the item.  Is there a way to permanently delete the item the first time? – NGF – ODIN libraries have chosen to not permanently delete bibs and items immediately. WFP has been using WITHDRAWN status instead of deleting to prevent display in the PAC. It appears to work well for them.
	+ Should we hang on to copies we’ve reordered until the new ones come in and then delete the old copies so we don’t have empty bib records? – NGF – WFP suggested using circ status to address this workflow.
	+ Deleted status (search for deleted status ones and if it’s empty when it shouldn’t be, dig harder) – Stacey -- DEFERRED until next meeting due to time constraints
	+ Tips/hints – Stacey – DEFERRED until next meeting due to time constraints.
	+ For people cataloging audio things and e-audio items, be careful to not merge with digital branch items – Stacey -- DEFERRED until next meeting due to time constraints
	+ Bib record template cleanup – Stacey -- DEFERRED until next meeting due to time constraints
* Future topics:
	+ - Subject heading display – group to decide on standard to include FAST and/or BISAC.
		- How to deal with duplicates? Who is responsible for searching for them? Who do we report them to? Who fixes them? Etc. \*\*\* this will be revisited in the future when we have used the system more
* Authority records
	+ New release of Polaris installed on TRN and authority processing needs to be tested before applying to PRD. Lynn will work on procedures to work through the database.
* Update from libraries – how are things going?
	+ Please share any tips or hints you run across with either the listserv or at meetings.

**Next Meeting**:

Thursday, January 23rd from 10-11

Please send any agenda items to Lynn.Wolf@ndus.edu by Wednesday, January 22nd.

Connection information - session will be recorded.

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<https://us.bbcollab.com/guest/90d20ccbea9a407399fd573431fd4372>

Session dial-in:

Call in anonymously. Attendees using this PIN appear as anonymous callers in the session.

• Dial-in: 571-392-7650

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