**July 23, 2020 -- PKS Cataloging Group Meeting Notes**:

**Agenda**:

New items:

* Retention vs complete deletion of record sets – if you delete a record set should it be gone for good or need a double deletion? **UPDATE**: Will set up to delete RECORD SETS in PRD and see how things go. Will revisit if needed. In meantime, you can clean up your own records sets when you are done with them.
* How are you/your library doing during this time? Library open? Backlog of material to handle? UPDATE:
  + NGF closed due to COVID positive test for one employee, backlog caught up, will work on fast-cat process when back in the building.
  + WFP open to public, encourage mask use, patrons happy to have library open, caught up on old cataloging and working on the new items, getting ready to hire a position where someone had retired.
  + NDSL open in morning, close doors at noon, afternoon by appointment. Continue through August/September. Cataloging Department was reorganized earlier in year and cross training still needs to happen.
* Bobbi (NGF) asked about finding certain bib records “locked” and what to do with them. Suggestion was to check back later and if still locked, send to the odin-acad-cat listserv to see if we can determine who may be in the record.
* Meeting schedule may need to be discussed in August as to days, times, frequency, etc.
* Update on ALMA – things going well and next week is go-live.

Pending/old items:

* Large print and regular print item merging. Remove 020 $z if you run across it.

Megan/Jason - procedure to isolate those records still being worked on.

**Update**: on hold

* Subject heading display standards (include FAST and/or BISAC?). List to be provided to Jason to test on TRN server displays. Kristen sent several examples to share and work from. Poll sent out to listserv. DIP, Statewide Catalog Development Libraries, NDB all do not make any changes. NDSL deletes BISAC, Sears, MESH and foreign language headings. NGF had deleted what they did not want in the past – how does this impact the other libraries?
  + UPDATE: Discovery Group did not want to remove something that was useful so looking for guidance from Cataloging Group as to which should be retained for display. If we can define which tag and field is best to be displayed, that is the goal. OCLC bib format would have info. Jess (NDSL) will compile list for CAT group to review and then will let DISC group decide. Would not be able to suppress specific strings – they either have to be on/off. Jason mentioned he saw a request on Idea Lab to allow more specific suppression and was in the second to last stage for consideration.
* **Discussion topic**: MARC fields to set in the templates to be stripped out of OCLC during import: 029, 263, 938. These are all vendor-specific fields that are not intended to be used by libraries or patrons.

We have several options ….

* + - #1 set up tags to delete in the default which would limit your flexibility but standardize across all libraries (assuming everyone can agree)
    - #2 have a recommended standard for the Import Profiles and let each library determine what is best for what they are doing. This would allow for different tags to be deleted in different profiles as needed
    - #3 In release 6.4 (currently available on TRN environment and soon to be installed on PROD), there is an option to delete all instances of a defined tag – not just the first or last during a Bib Record Bulk Change. This should be of great help in some of the remaining cleanup activities.
    - #4 set up profile in OCLC to strip out tags on import.

Lynn setup PROD server for NGF to not retain tags. Bobbi had to make a slight profile change to use the system default settings. **To do:** Work on document outlining the different ways to address this issue. Will become part of the Cataloging User Group documents when completed. **UPDATE:** no change

* Audrey from NGF reported having issues with ILL – LEA material is being sent when NGF already owns the item. Lori will check if this is still an issue and ask Audrey again to submit ticket if it is. **Status? UPDATE:** Appears to be still happening. Possible problem with patrons not paying attention to multiple editions and not choosing their library’s edition. NGF is not doing ILL at the moment and with libraries closed it is difficult to test. Patrons appears to be defaulting to all ODIN view so not restricted to their own library. Libraries should make sure they are linking to their own view instead of the All ODIN view. There is a setting that can prevent requests from going out before being reviewed. Would add extra work if all requests are mediated. Leach is set up this way since June. CIRC/Resource Sharing is working with this issue so will be removed from CAT agenda.
* In March it was mentioned that Leach has separate bibs many times for same title so the patrons are requesting material. PAC settings might play into the issue. Which view are they coming into and what are the limitations of that view. Any further information on this?
* WFP and NDS interested in Polaris label making process - Lynn find documentation to discuss at a later meeting. **Update**: WFP has been able to make this work – still need a few refinements and correct labels to arrive. Documentation was helpful once sizing was clear. Success! Working on process through Polaris to print as record is cataloged. Discussion on having to clear out the label queue once it hits 500. It is .
* Removal of items/bibs marked for deletion affect on stats. Response from Polaris.
  + This issue needs further discussion to include more libraries. Circ stats are impacted with item deletion.
* Retention of files – delete anything from before prior month (keep current plus one previous month)? Import files and report files. Lynn checked Polaris documentation for recommendation and there was no static answer – they leave it up to each site to determine what they want to do.
  + This issue needs further discussion to include more libraries.
* Diacritics in 520 field will sometimes generate PAC search error "An error was encountered" Once we isolate the record, it can generally be fixed using the General Punctuation character set. Requested update from Lauren on status of fix. **Update:** Received update and it indicated there was no immediate plan for a fix. Waiting on example to be reported to make sure this will fix problem.

**Next** **Meeting**:

Thursday, August 27th from 10-11

Please send any agenda items to [Lynn.Wolf@ndus.edu](mailto:Lynn.Wolf@ndus.edu) by Wednesday, August 26th.

Connection information - session will be recorded.

To join click on the following link:

<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

• PIN: 4111272841