**August 27, 2020 -- PKS Cataloging Group Meeting Notes**:

**Agenda**:

New items:

* Polaris client/remote app – Recommended way to logoff at end of day - Ideally, you "X" out and/or File/Exit - these do the same thing. THEN you go and click the "logoff" button to terminate your terminal session. Logoff button is located under "ODIN (Polaris Resources) List in the Start Menu and has a brownish key as the symbol.
* Bibs and items marked for deletion – on 6/24/20 email entitled Cataloging User Group meeting included info from Polaris about how circ transactions are counted and kept (this is also included in the attachment to this email).  We are encountering more frequent issues including inventory reports when the status of “deleted” needs to be excluded so they don’t show up. Circ stats are impacted with item deletion. Lynn will request it get added to CIRC User Group agenda for Sept 1st.
* What is the best way to get stats for number of deleted bibs/items? Will that change once bib/items marked for deletion are completely deleted?  Stacey has run a few tests and the ILL procedures at NDSL may complicate getting accurate stats. The previously mentioned statistical summary won’t be a great reflection on how many NDSL titles are deleted but other libraries could think about using that report. Has anyone found a better report for counting deletes? Most libraries have not investigated this yet.
* After the first delete/purge, how often do we want to schedule them?   Dates should be at least 2-3 months out. Maybe twice a year, quarterly?
* WorldCat --- where is your library pointing? (Jason / Stacey) Stacey will share info on the listserv as far as what to look for and how to correct. Watch for email by end of next week.
* Cataloging User Group Meetings – schedule working for everyone? Is once a month adequate – should they be every other week? Seems to be working fine for people – if that changes we can reevaluate.
* How are you/your library doing during this time? Library open? Backlog of material to handle?
  + NDSL – still limited hours - appts noon-4 in September – noticed few vendor delays for material.
  + GFPL – not open to public – curbside server 3 days week – staff half on site/half remotely, increase in material being ordered. Remodeled offices.
  + WFPL -- Mary has a newly remodeled updated office with a window (maybe she can give us a tour if we stop in when they open). Building is open, mask use and social distancing.
  + DIP – “close to normal” with shortened hours and fewer computers open. Always behind for cataloging.
* Suppressing items – Display in PAC checkbox. If suppressed at the BIB level, this will affect all items attached to that bib. Please remember to suppress on the ITEM level.

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 – Lori is running across fewer of these issues. Possibly explore Import Profiles and reporting

* 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 formats would have information. Jess (NDSL) will compile list for CAT group to review and then will let DISC group decide. \*\* was list compiled -- not quite yet but still coming.
    - FAST heading suppression is in the "Future Possibilities" stage - last step before implementation.
* **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

* 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? If this is no longer an issue, it will be removed from agenda for next time CAN BE DELETED from agenda. Changes had been made on LEA configuration so item stays at LEA for 30 days and that has reduced frequency.
* 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. Can be deleted after 2 months – if this causes any problems we can revisit.
* 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:** This should be resolved with the change Jason made to the PAC configuration. Please report any further issues via a Help Ticket listing Search term and this will be removed from agenda.

**Next** **Meeting**:

Thursday, September 24th from 10-11

Please send any agenda items to [Lynn.Wolf@ndus.edu](mailto:Lynn.Wolf@ndus.edu) by Wednesday, September 23rd.

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