**May 9, 2022 – Academic Cataloging Group Notes**

**Attendees:** Linda Olson, Lisa Grover, Shelby Harken, Anja Martin, Julia Cater, Laurie McHenry, Kelly Kornkven, Benjamin Ferguson, Tina Gross, Michael Lewis, Felecia Clifton, Amy Carson, Liz Mason

**Comments/Questions?**

* At NDSU they are doing the streamlined holdings process with OCLC. It is free and open until the end of May. Tina can provide information to anyone who is interested.

**Ongoing Topics:**

* Match process in the metadata editor is now using the Unique OCLC Identifier match method. Does this seem better than before?
  + Felecia cataloged an item last week, replaced a record on OCLC. It has a different OCLC number than the one in the NZ. It didn’t link. Is it because of the change? The system should be able to account for that with the old OCLC numbers in the 019. Please let ODIN know if you continue to have problems with this.
* We added the 019 and OWN field, so they are no longer causing validation warnings. Any more validation errors you would like to report? How is this going?
  + Tina is still getting the error for the 019. Part of the clean up is opening and IZ record in the metadata editor, she uses the search OCLC function in the MDE, she brings in the record and either shares with network, or links to a record that is already there. Liz thinks this may be because she only loaded the validation pack to the NZ and Tina is working on IZ records. She will load the validation pack into NDSU’s Alma and see if that fixes it.
* Red validation error when opening a holding record. A solution to this is to customize your holding template containing codes for your library and a default collection. Liz can demonstrate how to do this.
  + Liz did a quick demonstration of how to create and edit a holdings template and add it to the metadata editor menu.
* OCLC has started to add headings from other vocabularies to bibliographic records. The concern is how this will affect the Primo display for these records. Has anyone noticed any of these records in Primo?
  + Tina has not seen these appearing in Primo yet. There are records with lots of different vocabularies already. She would like to be more intentional about which ones display in Primo. Shelby has been cataloging older items lately and has not seen the new headings yet. Have you noticed record being cut off because of long lists of headings? She thought they might cut off after 20 or so. She thinks the record is taken from top to bottom, and most of the time the LCSH will show up.
  + Tina suggests that the way to handle the proliferation of subject headings would be through display settings in Primo VE rather than editing them out in the NZ.
  + Should we turn over to the Primo group? We would need to provide examples. We can discuss it here and ask for expertise from Lynn on how to turn off certain vocabularies. Tina will look for examples.

**New Topics:**

* Some highlights from the [Alma May Release](https://knowledge.exlibrisgroup.com/Alma/Release_Notes/2022/Alma_2022_Release_Notes):
  + Form for creating indication rules is now available. Video demonstration: <https://youtu.be/Ze8-K1WuWV8>
  + Bulk add items to a work order. Video demonstration: <https://youtu.be/K1lAEJuGZdU>
  + Update the following information to multiple electronic collections at once: Authentication note, collection level urls, and proxy server information using the Change Electronic Collection Information job.
  + When creating a new portfolio there is now a button to Save and Test Access.
  + Physical Items search by “In process type.”
  + Metadata Editor now supports Safari on Mac OS.
* OCLC Streamlined holdings – still open until the end of May (<https://help.oclc.org/Librarian_Toolbox/WorldCat_Holdings/Streamlined_holdings_update_FAQ> )
  + This process reconciles the holdings of the library with OCLC. This process is an abbreviated version of OCLC’s “data sync” process. It is free for a short time. It is normally quite pricey to do it. The process is you download your entire database – everything that has OCLC numbers that you want to have your holdings on in OCLC. Any records that are not matched OCLC will remove the holdings on those, and they add holdings to the records in your file. Tina is happy to answer any questions and help if she is able to.
  + Ben just did this project prior to migrating to Alma and he might be able to help people doing this as well.

**Open Discussion:**

* + Spine labels – Kelly is interested in hearing about how many people are creating spine labels. Julia – they use a Zebra printer, it is set up to print the correct spine label from the record when she presses a button. She is using the OCLC label printer, not Spine-o-matic. Kelly, stopped using Zebra printer after they stopped working after a Windows update. Julia has had the experience of Windows wiping out her printer settings. Now she has them written down so she can set up the printer again. Ben says they have a Dymo printer for printing labels, but they do not use the Dymo brand labels as they wear out over time. They use DuraReady labels. Shelby says they use the Spine-o-matic program within Alma and a Zebra printer. They tried the Spine-o-matic cloud app and it was clunkier. They have their labels centralized, one person does them for everyone.
  + Status Deleted records – how do you find them. ODIN has a page on how to find them. <https://www.odin.nodak.edu/training/resource-management/resource-management-maintenance> and scroll down to number 5.

**Ideas for Open Discussion**

* + OCLC Streamlined holdings project updates

**Next Meeting:**

Scheduled for 2nd Monday of each month or as needed.

**Monday, June 13, 2-3 pm CT -** Submit any agenda items to [Liz.Mason@ndus.edu](mailto:Liz.Mason@ndus.edu), [Tina.Gross@ndus.edu](mailto:Tina.Gross@ndus.edu), or to [ODIN-ACAD-CAT@listserv.nodak.edu](mailto:ODIN-ACAD-CAT@listserv.nodak.edu)