Marmot Union Cataloging Committee
Wednesday, June 26, 2019
Minutes

X	Jamie Walker [Chair]	CMU		Stacy Contreras	Lake Co
X	Mary Walsh	Adams State		Betsey Dick	Mesa Co
X	Sara Francis	Basalt	X	Susan Hartman, Mary Paladino	Montrose
X	Robin Trehaeven, Juliana Van Pelt, Carol Harvey, Cindy Young	Bemis	X	Shelly Fratzke	SD#51
	Nina Darlington	Bud Werner	X	Wendi Weinstein	Pine River
X	Jan Quick	Buena Vista	X	Carol McArdell	Pitkin
X	Oliver Schulz	CCU		Debbie Barnes	Rampart
		CMC Glenwood		Becky Nelson, Kristin Trombo	Salida
	Liz Miller	CMC Leadville		Sarah Nordholm	Summit Co
	Jonathan Beam	CMC Steamboat		Jo Norris	Vail
X	Diane Levin, Jolanda Durbin	Eagle Valley	X	Nicole Becwar	WSCU
X	Selene Gardner	Englewood		Amy Sieving, Alison Farnham	Wilkinson
X	Tyler Dunn	FLC	X	Tammy Poquette	Marmot
	Amy Shipley	Garfield Co	X	Lloyd Chittenden	Marmot
X	Tallie Gray	Grand Co		Brandon Cole	Marmot
	Jennifer Hillebrandt	Gunnison Co		Adam Murray	Marmot

Announcements
- None

Completed action items

Create another revision of the Cataloging Standards Document to consider	Done, discussion later
Look into how grouping works in Primo	Primo does group using the 7xx fields, but it appears that it requires all of them to match to create a group. This would make it very ineffective. Very few things would actually group because the records would have to be identical, which rarely happens.
Check out Library Extension	This is a browser plug in that will check your local library for a book when you search for it on Amazon. It should work with Pika.
Double check running time as grouping criteria	Lloyd found 2 more examples of titles that would make a bad group based on running time. There are two entirely different movies with the title "1" that have very close running times, also two versions of "1984" with very close running times. Jamie suggests we use the currently manually grouped titles to find likely problems to assess the value of the two methods. Lloyd will try to check a random sample to see which method (7xx vs. time) creates fewer problems. Maybe the manually grouped list would be a way to find a sample to check. **<<ACTION ITEM.**

Discussion Topics
- MUG topic
  - The MAC is no longer doing a MUG session, Oliver's talk about collection pruning will act as the UCC session. Oliver could talk for the entire hour, but it would also be good to include other perspectives. If there is anyone who would like to work with Oliver to add a public or school perspective to the session on collection pruning, please get in touch with Lloyd, or Oliver directly.
- Duplicates Team Report
  - The Duplicates Team looked at how Mesa County is loading records from Ingram. We thought about using a load profile that would overlay based on encoding level priority, but we realized that the Marquis macro would actually do an even better job. Mesa is going to explore using Marquis.
  - Sara askes what are recommended solutions for libraries without the acquisitions module?
    - Marmot doesn't really have a recommendation. Different libraries are doing different things. The Marquis macro is one option. It would work without acquisitions.

- Headings reports is also useful for finding duplicates.
- Shelly points out that running a test before loading records will allow you to find ones that will be duplicates before you load them. Then you can fix them before the load and not create duplicates.
  - o Sara asks if Marquis is a product that you have to purchase.
    - No, it was written by Andy at Telluride library. It is free. You can get a copy from him to try out.
    - It is being used by Telluride, Grand, and Garfield Counties. Mesa County is looking into it.
    - You could visit one of those locations to see it, or we could set up a zoom meeting to check it out.
  - o UCC asked about how they can learn about using the macro and we decided that Marmot should develop some documentation and training for it. **<<ACTION ITEM**
- Collapsing search facets
  - o We had talked about this on email. The email vote was that most people liked the idea of collapsing the facets and moving location, format, and availability to the top of the list. We wanted to bring this to the meeting for discussion before making an actual change. There was no objection to this change. It will also be brought up in ASC.
- Folio meetup
  - o Many Marmots attended the FOLIO meeting in Denver this month. The system seems incomplete but very promising.
  - o At UCC we looked at the online demo that is available.
  - o The demo is available to anyone at wiki.folio.org. It is listed under Demo Sites and the login is on that page.
  - o Lloyd will start attending FOLIO development zoom meetings.
  - o Someone asks if they can have the link to the zoom meeting. Lloyd will send it out.
- IUG
  - o Several Marmots attended IUG in Phoenix.
  - o Lloyd talks about learning about SQL. He learned that it can't export records like Data Exchange. It can only export information similar to Create Lists. It won't be useful for exporting MARC records, so it can't help with the fact that it is very difficult to control our export profiles.
  - o Lloyd also learned about APIs in the hopes that these could be used to allow us to create more efficient record loading processes. The acquisitions API currently allows loading of order records. We would like to be able to load other types of records via API, maybe with the Marquis macro.
  - o Currently there is only one API that loads records and it can only load through one load profile. It may be possible that the Marquis macro or something like it could imitate the acquisitions API and load records for our own purposes, but it is not something envisioned by III.
  - o Lloyd is thinking about starting an IdeaLab enhancement suggestion so that APIs could load with any load profile.
  - o Mary said that she enjoyed Brandon and Lloyd's presentation about our duplicate checker. She would like to see them do something like that for Marmot.
  - o Several people like the idea of a training on the duplicate checker. **<<ACTION ITEM**.
- New Cataloging Standards Document
  - o Mary would like page numbers added.
  - o We approve the new version of the Cataloging Standards Document that has been available for review on Google Docs.
  - o This will be converted into a static PDF and posted on the Marmot web page. **<<ACTION ITEM**
- eContent Cataloging for Pika – Pascal
  - o Pascal wanted to talk to the UCC about the non-marc field g that we use in our item records to identify things for Pika as electronic records. There are several aspects of the information we have been recording in this field that are now obsolete. At this point the only thing Pika still needs from this field is the name of the collection that it used to create a search facet.
  - o There are still some collections of econtent that are being loaded into Sierra.
  - o The element of field g that used to define whether items are shared or not is now controlled by location. There are certain locations that are used for shared content. Putting your item in one of those

locations tells Pika it is shared content. The locations are listed on the Marmot help page about econtent cataloging.

- o Other locations can be added to the list of shared location codes. CMU gov docs for example are in a cu location, but they should be shared. We realize that Pascal needs to add that location. **<<ACTION ITEM**.
- o In the future this field will only include the name of the collection. The other elements of field g are obsolete.
- o The obsolete elements can be removed from field g now.
- o Marmot will rewrite the econtent cataloging documentation to reflect this change. **<<ACTION ITEM**

- ● Record loading verification tests
  - o Lloyd just realized that this could be helpful for some of our load profiles. It is possible to have a loader that essentially does a second check after finding a match. This second check could be against the title. This would help prevent overlaying records that have a bad 001. We know that some of our records have bad 001 fields from an event years ago where the zeros were deleted from many of these numbers. If someone happens to overlay one of these bad records it would completely change the record so that it described a different book and the holder of the original book would not even know it had changed. Many of these bad overlays have already happened, and more could happen.
  - o With a verification test in the load profile the system would check that the titles matched in the target and incoming record before doing the overlay.
  - o This could also help with ISBN matches, but many of those will have the same title since the problem there is frequently that they are records for different versions, not actually different books. Sometimes these are different books, so this could help here as well.
  - o Lloyd will create a test load profile to experiment with this. **<<ACTION ITEM**
- ● Do we want to index FAST headings? 647, 648, others?

New Action Items

Random sample of records to get quality assessment of whether running time or 7xx are better for grouping DVD.	Lloyd
Develop documentation for Marquis macro	Lloyd/Tammy
Create training for the duplicate checker	Lloyd/Tammy
Rewrite econtent cataloging documentation	Lloyd/Tammy
Add CMU gov docs location to list of shared econtent locations	Pascal
Create load profile to experiment with 245 verification test	Lloyd
Post a PDF of the new Cataloging Standards Document to the web site	Tammy

Ongoing Action Items

Action	Responsible parties
Write up a paragraph about how we want holds to work for volumes and sets	Duplicates Committee
Figure out how we can control Prospector display with ITYPE	Lloyd/Brandon
Develop survey of what everyone is doing with sets and part records	Duplicates Committee
Figure out how to copy Garfield birthdates to variable field	Lloyd
Develop cataloging training materials	Tammy/Lloyd
Develop flow chart for how to use the volume field	Lloyd
Figure out a process for authority control for FLC's discovery records	Lloyd
Investigate a new Tableau utility for finding bad volume field use	Lloyd/Brandon

Duplicates Sub-committee meeting: July 10, 9-10 MT
Next UCC meeting: July 24, 9-11 am MT