

Marmot Union Cataloging Committee
 Wednesday, Feb 23, 2022
 Minutes

x	Jamie Walker [Chair]	CMU		Jill McKinney	Gunnison Co
x	Mary Walsh	Adams State	x	Aj Brokaw	Lake Co
	Carol Statersmoen	Aims CC	x	Lisa Solko	Mesa Co
	Steven Weiler	Basalt	x	Mary Paladino	Montrose
x	Richard Allen, Juliana Van Pelt, Carol Harvey, Cindy Young, Mary Miller	Bemis		Shelly Fratzke	SD#51
x	Nina Darlington	Bud Werner	x	Wendi Weinstein, Lydia Wacasey	Pine River
x	Karen Johnson	Buena Vista	x	Carol McArdell, Nathalie Crick	Pitkin
x	Oliver Schulz	CCU		Kathleen Edie	Rampart
	Becky Kramer, Chris Cook	CMC Glenwood	x	Susan Matthews, Becky Nelson	Salida
	Liz Miller	CMC Leadville		Rebecca Kane	Summit Co
	Jonathan Beam	CMC Steamboat	x	Jo Norris	Vail
x	Leah Morris	Delta County	x	Nicole Becwar	WCU
x	Diane Levin, Jolanda Durbin	Eagle Valley		Amy Sieving, Alison Farnham	Wilkinson
x	Selene Gardner	Englewood		Tammy Poquette	Marmot
	Tyler Dunn	FLC	x	Lloyd Chittenden	Marmot
x	Jenn Cook	Garfield Co		Ashley Sneesby	Marmot
x	Tallie Gray, Kim Bunning	Grand Co		Brandon Cole	Marmot

Announcements

- IUG registration is open
 - Conference will be entirely virtual
 - April 5-8
 - \$75
 - <https://www.innovativeusers.org/conferences/iug-2022-virtual-conference>

FOLIO Updates

- R3 2022 will be called Nolana
- Lotus bugfest is starting soon
- Chicago can't suppress ILL records. Manual orders are getting attached to ILL records because they aren't suppressed. Staff can't tell what is ILL and what they own.
- Acquisitions SIG
 - Meeting with Data Sync group
 - Links between records do not go in both directions, pieces have a link to items, but items don't link back to pieces.
 - Discussion of vouchers
 - Keyboard shortcuts in Lotus
 - Export orders in EDIFACT in Lotus
 - Ability to void an invoice
- App Interaction
 - Linking users to orders to identify requesters and selectors, maybe confidentiality issues?

- Chicago tried GOBI orders api, but turned it off because of “all kinds of matching problems”
 - Demo of orders/Inventory link. Item created while order is created.
- Bulk Edit
 - Currently only users can be edited, not other record types are editable yet.
- Consortia SIG
 - Working on essentially a gap analysis of what they need from FOLIO for a central admin tool
 - Met with Acquisitions SIG people
 - Planning meetings with representatives of other SIGs to find out how they can support what consortia need.
- INN-Reach
 - III is requiring testing on a production server for 6 months before certification. That means one library needs to implement and test for 6 months before anyone else can implement.
 - The INN-Reach module is not part of FOLIO proper. It is being developed as an independent app on a similar, but not identical release schedule.
 - Existing INN-Reach transactions won't be migrated to FOLIO. Implementers are talking about keeping their old systems for 6 months until all old transactions are completed.
- Metadata Management
 - Discussion of migration experiences
 - Missouri
 - Fameflower R1 2020
 - Serials was really hard, don't leave this for the last minute
 - “Expect disappointment”
 - You will need workarounds
 - Cornell
 - Iris R1 2021
 - Catalogers are still at about 40% of pre-folio productivity because of so much scrolling and clicking
 - Chicago
 - Kiwi R3 2021
 - Practiced migration every 2 weeks for months
 - Still left data behind by mistake
 - Performed whole library load testing to find where hardware bottlenecks were
 - SRS requires all records to validate in MARC
- Data Import
 - Record loading creates a lot of logs that slow down the system.
 - EBSCO deletes these logs for Cornell, but it is “a losing battle”
 - Single record import creates hundreds of logs a day
 - Morning Glory will give the user the ability to delete these logs themselves.
 - So we can lose the battle on our own?
 - Ability to load multiple holdings and items may be built in Nolana
- Nina asks about the difference between a holding and item.
 - This is the FOLIO structure.
 - FOLIO has a 3 level structure with holdings records attached to bib records and item records attached to those holdings records.
 - Sierra also has holdings records. They are used to keep track of serials checkins. They are attached to bibliographic records independent of item records. In Sierra only serials get holdings records. In FOLIO everything has to have them.
 - FOLIO is somewhat flexible about what information can go in an item record or holdings record and we will have to figure out what we want to keep in which record.
 - When we migrate we will have to figure out how to attach items to the existing serials holdings records. This may have to be done manually after migration. This would be a good question for those who have migrated from Sierra already.
- Marmot is hoping to have a test server working this summer.
 - This is requiring them to modernize the way our hardware is structured, so it is a lot of work for them.
- Lisa suggests that we could move the FOLIO discussion to the end of meetings because some people don't have interest in FOLIO and don't want to spend time hearing about something they don't plan to use.

- We will do this at the next meeting.

Discussion Topics

- Issues with Sierra BIB LVL field - Lisa
 - The labels for BIB LVL in Sierra and BIB LEVL in the MARC leader are different. They represent the same things, but the labels are different so that is confusing. It is particularly confusing that the labels in Sierra are simplified to the point that they are not really accurate.
 - Jamie suggests that we should change the labels in the Sierra BIB LVL to match the corresponding fields in MARC.
 - There is no objection to this change.
 - The display in Pika is also confusing. It is often wrong.
 - This is confusing because Pika ignores the Sierra fixed fields and only looks at MARC proper. So you may have set the Sierra MAT TYPE correctly, but if the MARC Record Type says something else, it is the MARC field that will control Pika.
- Mary Paladino brings up an issue she has noticed with an audio book being described in Pika as software.
 - We investigate this and realize that the MARC record actually describes an MP3 audio disc. So this is a sound disc, but it is a computer file. That is why it is showing as software.
 - This may be something the Pika team needs to fix.
- OCLC Projects
 - Aims College got their records back and almost all of the records were returned. This implies that the OCLC project would replace over a million records if CMU participates. That would be a really large fee from Marcive if we were to replace that many records.
 - I suggest that everyone who wants to do the OCLC reconciliation project should go ahead and send it records, but do not load them in Sierra.
 - Send the records to Lloyd. He will dedupe them and get a total count of how many new records we would replace and find out how much that would cost from Marive. At that point we can decide if we want to ask the Marmot Board if they want to pay to replace the records.
 - Otherwise Lloyd will try to use the data from the new records to at least update the notes in our records.
 - Jamie points out that he would not send in some of his ebooks.
 - Each user can determine for themselves what they want to include. You can exclude whatever makes sense depending on your collections. You might exclude ebooks, ILL records, equipment, rented books, discovery records.
 - Mary asks how we should organize sending in records to OCLC
 - I don't think it matters who sends in records when. We will just put it all together when it comes back
 - Lloyd will work on developing documentation for how to produce the file you would send out to OCLC.

Ongoing Action Items

Action	Responsible parties
Investigate a load profile that would protect local cover art 856 fields, both Pika and Midwest	Lloyd
Investigate a load profile to set the 856 field group tag to LOCAL INFO, both Pika and Midwest	Lloyd
Discuss subfield 5 for 690 genre headings in Cataloging Standards document	Lloyd

Update Cataloging Standards document to explain the problem with call number prefixes in subfield d for the old printing system and subfield f for print templates.	Lloyd
Investigate Tableau tool for finding bad dedupes	Lloyd/Brandon
Create a new itype for a dummy item that will only allow local holds for the library that creates the record, and change load profile (J) to use the new dummy item.	Brandon/Lloyd
Fix load profile (J) to use new dummy item.	Lloyd
Fix the documentation for load profile (J)	Lloyd/Tammy
Create a flowchart to describe when to use which order record loader.	Lloyd/Tammy
Investigate using 0 field to indicate record needs to go to Marcive	Lloyd
Pursue joining Mountain West NACO funnel	Lloyd
Document ways to find music with no language in list 21 language problem list.	Lloyd
Develop cataloging training materials	Tammy/Lloyd
Develop flow chart for how to use the volume field	Lloyd
Investigate a new Tableau utility for finding bad volume field use	Lloyd/Brandon
Develop documentation for Marquis macro	Lloyd/Tammy

Next Duplicates Sub-committee meeting: 3/9/22

Next UCC meeting: 3/23/22