



SWAN Cataloging Users Group: Notes

Thursday, February 6, 2020, 9:30 AM-12:00 PM
Villa Park Public Library Meeting Room

Facilitators:

1. Claudia Nickson, Co-Chair, Bibliographic Services Consultant, SWAN
2. Sandra Leyva, Co-Chair, Patron Services Manager, Alsip-Merrionette Park Public Library

Agenda/Notes:

I. Welcome and introductions

Victoria Bitters will take notes and Sam Dietel will take notes from SWAN.

For people unsure about the distinction between the Cataloging Advisory and Cataloging Users, Claudia went over the mission of the Cataloging User's Group. The meeting is to serve as an outlet and as an opportunity to network. Issues discussed at this meeting will be sent to Cataloging Advisory via Scott. Claudia also went over the outcomes and encouraged people to submit topics for the next meeting so that SWAN doesn't drive the entire agenda. This is their opportunity to ask questions and get answers.

II. Creating on-order item records.

Claudia mentioned that most libraries seem to create items when they order materials and asked who in attendance creates items at the time of order.

a. Acquisitions libraries

Messenger is interested in adding items at the time of ordering and St. Charles instructed them that they can do this with the biborderload report. St. Charles checks out the "dummy" item to a DISCARD user so that the item created date will be correct. St. Charles has a routine where they do this automatically, so the extra step is not a deterrent for them.

Villa Park, an acquisitions library, creates the item record at the time of ordering with the biborderload report. They do not remove that item but update it. Therefore, they do not have to discard the item, but they do not rely on the item created date. They do this for all 9xx vendors but some vendors, like Amazon, they do not create the item until it comes in.

La Grange mentioned that if the vendor doesn't have EDI capabilities (ex. Amazon, particularly AV you can't get the specific UPC for), don't catalog until the item is in hand. Woodridge, an acquisitions library, used to update the "dummy" item but they heard internally at their library that people want the date created to be accurate, so they moved to removing that item and adding a new one when the item comes in.

Alsip, an acquisitions library, uses the biborderload to create the "dummy" items and just updates that item when it comes in. They rely on notes to know when the item was cataloged rather than relying on the item created date.

Claudia pointed out that the new holdings display in Enterprise is an incentive to create on-order item records. LGS said they just switched to adding items at the time of ordering and they love the new display and have received tons of positive feedback. Note that a call number without an item does not trigger this Enterprise display.

PHS asked if they use a lease program with B&T. LGS does and they do not create "dummy" items for that. PHS asked if they had an issue with holds, and LGS said no. TPS said they used to have a rental collection they used a non-holdable item type so holds were not allowed and therefore the holds issue was moot.

b. Non-Acquisitions libraries

Tinley Park, not an acquisitions library, adds items at the time of ordering. They use the Cat_by date and run reports in BCA to get their counts, so they are not relying on the item created date and do not have to discard that dummy item. Rather, they update it with the relevant information when the item comes in. The only concern with this practice is rental (Lucky Day) collection.

c. Automatically Yours (B&T)

Alsip just started using Automatically Yours with Baker and Taylor. They found that the biggest issue is that the information is given to them by the reference staff but human error caused Tech to place holds on the wrong title. Does anyone else use Automatically Yours? And what's the process?

LGS does this for children's series only. They do not do anything with the bibs or items until the materials actually come in because they do not know anything until they get the items in hand.

ESS was using it and they were getting a lot of duplicates. They use "AY Notified" instead, which sends a cart to be de-duped, processed, and submitted by the cataloger.

TPS uses something similar with Ingram and their staff adds an on-order item when they are notified.

Messenger downloads carts of AY items and manually adds items. Someone else adds holds. This is a time-consuming process u

III. Duplicate Records

a. Searching in WorkFlows (more than one search)

Especially with Children's material, like Paw Prints, Claudia reported that people are entering pre-cats for ISBNs that are not found. She recommended doing more than one search by title or another index to eliminate accidental pre-cats. She urged people to submit tickets if they find duplicate records.

b. Submitting a ticket

See: VII.

c. Searching vinyl records

Someone submitted a question about how to search for vinyl. Claudia recommends doing a general keyword search for "vinyl and other audio" because the 590 is indexed in the General search. If you add the {590} it will search the 590 only and eliminate hits in the list that are not intended.

In Enterprise, you can use the "Other Audio" facet and a general search but that search hasn't yielded perfect results. SWAN will research the best way to search this and get back to the attendees. Claudia recommends doing searches in both WorkFlows and Enterprise to best serve the patron. Scott noted that the 33x fields (ex. 340, where 'vinyl' is indicated) are not searchable in Enterprise. Scott mentioned that it might be time to consider fleshing out the "other audio" and "other video" 590s; vinyl and read-a-long Vox might be good contenders. He is going to pull some numbers and potentially bring this to cataloging advisory.

IV. Rec_Status fixed field

Claudia highlighted the new fixed field since the most recent WorkFlows upgrade. We cannot hide this or remove it from display. It is editable but please do not edit it. You should not use this field to judge the quality of the record. The Rec_Status field pulls information from OCLC, but that information is not updated to reflect our usage; a record might have been edited several times in our system and still say 'n' (new) in the Rec_Status field.

If you manually create pre-cats, note that this field shifted everything to the right, so be mindful of where you are entering your data. For example, the Fiction/Non-fiction field moved over. Be careful that you do not type the 1 or 0 into Index instead.

V. Large-scale projects

When submitting a large-scale project to SWAN (like moving collections from one location to another or renovations), give us time in advance to go through the edits, especially because we have to coordinate any larger edits with our overnight indexing so we don't harm the database.

Scott said that many libraries loop us in early, but this doesn't always happen, so please remember to give us notice. Sometimes there may be a delay before work can be completed, so it's in your best interest to let us know early.

VI. Demonstration of available resources on the support site: documentation, webinars, etc.

Claudia demonstrated how to send a ticket with an email and with using the webform.

She showed where the training recordings live on the support site and the resources on the Documentation pages. Also, she recommended reviewing the Known Issues on the support site periodically, as those get updated and many times you will find the answer to your question there. What about handwritten forms (yellow, pink) that people send via delivery? These and images of a work that needs full-level cataloging can be scanned and attached either to emails or the webform, instead of sending paper copies to SWAN.

Aaron mentioned that entering things in the support interface directly instead of emailing is more secure, so if you are a staff member that only submits tickets via email, consider using the Help Desk Support Login instead. Aaron also noted that there is no ability for users to delete a ticket in the web interface.

VII. Library of Things - Best practices

Sandra noted that it's getting more common to have different objects circulating and wanted to see what other libraries are doing. How are people creating the pre-cats and other bibliographic records associated with library of things kits?

Please use authorized subject headings to maintain consistency. Local subject headings can also be added using the 690 tag. Please let SWAN know of any 690 tag you currently use or with to use. Bibliographic Services can also assist with adding local subject headings to a large batch of records if necessary.

TPS recommended adding a subfield q if you add the title next to the ISBN in kit bibliographic record. Anytime you add text to a standard number, add the subfield q but include parenthesis. St. Charles uses 500 notes for contents notes but if there is a kit with just books, they use the formatted 505 with subfield t.

Rule of thumb – if it is a kit you put together yourself and only you have it, put your library code in the title, but if it is something that someone else can purchase, for example, board games that have UPC number, don't put your code in the title.

Scott mentioned to leave the 977 PRE-CAT note in the record because SWAN staff will end up looking those records over when they run the pre-cat list.

VIII. Open Discussion

Rebecca reported that linked data is working now.

Scott displayed all that is involved in the President's Day Rebuild Clean-up

- i. ISBNs with a |z should no longer be used to matching. This will be effective after the rebuild.
- ii. GMDs will be purged
- iii. Call number analytic tweaking – cleaning up the volume data in the |z. Call numbers themselves will not be changed.
- iv. 9xx cleanup – he's going to try to clean up junk data in these fields
- v. LINC/MAGIC/GHS TCN standardization – all will be standardized to the "a" format
- vi. Fields to delete Cleanup – Fields to delete cleanup (BISAC, Sears subject headings; 653; 6XX fields with _3, _4, _5 (?) indicators ; 020 |c fields)
6XX fields with _1 indicators will also be removed, wherever viable, but first they'll

be checked to make sure they have the appropriate corresponding _0 fields
Subject searching should be better.

- vii. 856 Cleanup (based on \$3) - any extraneous data should be stripped out
- viii. MARCIVE Comprehensive Notification Service – MARCIVE comprehensive notification system sends, twice a year, updated authority and bibliographic records where a change was made to an authorized heading (ex. Author now has an authorized form, or died, etc.) ; they send a copy of the record we already had with just the authorized heading info updated (all changes we've made still apply)
 - The latest batch of these record updates will be implemented
- ix. Also rolling in item record updates for St. Charles and Woodridge.
- x. Downtime? The whole President's Day will likely be down. Dawne said that Tech staff should not be doing a lot of item record changes so that these changes can take precedence and the system will not be unduly taxed.

Should BISAC subject headings be deleted? MARCIVE takes care of that twice a year, but they can be manually deleted as well.

Carol Stream asked about the recent announcement that serial control records will be stripped of vendor names. We received some feedback on that and will not be removing any records that you need to perform your duties. SWAN will update the News Post indicating that no changes have yet been made. Feedback about how libraries use this tab for claims generation has been received and the complete removal is being reevaluated.

Itasca is considering going from Ingram to Baker and Taylor. Does anyone have any advice? They want to start around their new fiscal year, in May. Joy said that B&T is having trouble shipping things on time and closed several warehouses. If you have B&T do your processing, there are issues with covers being improperly cropped. You also pay for user accounts with B&T but you do not with other vendors like Ingram, so bear that in mind. Sam pointed out the "Acquisitions library vendors" grid on the support site. It is a good resource for libraries wanting to know which vendors their neighboring libraries use.

IX. Next Meeting

Next Meeting June 4, 2020, 9:30 AM – 12:00 PM (TBD)

Attendees:

1. Kathleen Alberts (Alsip-Merrionette Park Public Library)
2. Joy Anhalt (Tinley Park Public Library)
3. Diana Bacigalupo (National University of Health Sciences)
4. Rebecca Bartlett (La Grange Public Library)
5. Victoria Bitters (Eisenhower Public Library District)
6. Barb Boucher (Carol Stream Public Library)
7. John Bradford (Villa Park Public Library)
8. Marie Costuna (Carol Stream Public Library)
9. Mary Donovan (Oak Lawn Public Library)
10. Claire Dunn (Villa Park Public Library)
11. Laura Folliard (Westmont Public Library)
12. Tess Forbes (Woodridge Public Library)
13. Mary Jane Frank (Franklin Park Public Library District)

14. Joanne Galloway (Messenger Public Library of North Aurora)
15. Anne Hope (National University of Health Sciences)
16. Dana Kraszczyński (Bloomington Public Library)
17. Susana Leyva (Palos Heights Public Library)
18. Nora Mastny (Downers Grove Public Library)
19. Kari Moncrieff (Geneva Public Library)
20. Sussan Navabi (Alsip-Merrionette Park Public Library)
21. Carmen Parker (Hillside Public Library)
22. Erica Sanchez (Woodridge Public Library)
23. Linda Scilingo (Bloomington Public Library)
24. Sarah Sperry (Franklin Park Public Library District)
25. Julie Tegtmeier (St. Charles Public Library District)
26. Laurie Turnquist (Geneva Public Library District)
27. Amy Weiss (Woodridge Public Library)

SWAN staff in attendance:

1. Scott Brandwein (SWAN)
2. Samantha Dietel (SWAN)
3. Diane Nickolaou (SWAN)
4. Angela Puckett (SWAN)
5. Aaron Skog (SWAN)
6. Sue Stupar (SWAN)
7. Dawne Tortorella (SWAN)