



SWAN Cataloging Libraries  
Meeting Minutes  
Thursday, April, 10, 2025 @ 10AM  
St. Charles Public Library

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**Present:** Jenny Cuevas (ADD), Eden Morris (ADD), Paul Rubio (ADD), Stephanie DeYoung (BLD), Marie Constuna (CSD), Susana Leyva (DGS), Kira Riddle (DGS), Victoria Bitters (ESS), Ann Marie Lindsey (GED), Rebecca Bartlett (LGS), Emily Parker (LGS), Dani Erway (MED), Nikki Vaillancourt (NUD), Melissa Siddiqui (OBD), Colleen White (OPS), Amanda Kaiser (SCD), Julie Tegtmeier (SCD), Joy Anhalt (TPS)

**SWAN Staff present:** Cynthia Romanowski, Angela Puckett, Diane Nickolaou, Lucas McKeever, Samantha Dietel

**Absent:** Christine Karns (BDD), Laura Hays (CSD), Diana DiPierro (LPS), Rita Hassert (MAS), Jenny Yasecko (OLS), Katie Yager (RGS), Bronwen Heneghan (TCD), Anna De Leon (TOD), John Bradford (VPD)

**Meeting called to order:** 10:03 AM

I. **Welcome**

Cynthia welcomed the group to the meeting and introductions were made by SWAN staff and attendees.

II. **Clean-up work updates**

Cynthia shared an update about the work that has been done with the 035 OCLC System Number work. She thanked the libraries that have been helping to overlay these records and was trying to be conscious of overloading them with records to enhance. She commented that there are still many to fix, at least six digits worth. Scott and she will hopefully be able to create a script that will get most of them; however, she acknowledged that this would not get all of them because of unique data that was stored in the 001 that were not OCLC numbers.

**Discussion:**

A request was made to be given additional records to assist with the project.

Cynthia reported that the Backstage contract was signed, and we received the documentation to configure the work that SWAN will have them do this week. She noted that Backstage can do what MARCIVE did, such as update records to RDA. She stated that she needs to review this documentation and make sure that all who needs to be involved will be present at the requested meeting with Backstage.

**Discussion:**

A question was asked to have documentation on what tags and updating that Backstage will do, specifically the MARC fields that they will modify or delete and any additional

work we will have them do. Cynthia stated that documentation was on SWAN's website about what MARCIVE did but has been unpublished since SWAN have to update it with Backstage information. She also reminded everyone not to rely on scripts for changing or removing data because they can and do break, making it not always obvious as to the cause. They should be practicing proper cataloging so that this data is removed or changed before importing into the catalog.

### **III. Travel guide update**

Lucas updated the membership on the progress made for standardizing Travel guide titles within the catalog and showed the unpublished documentation site. SWAN's recommendations were to put the 245 as the city/country/region and put the series within the 246 with subfield i At head of title: and to add a 490 0 whenever there is an unauthorized series because Aspen will allow for searching on this tag. If an authorized series entry exists, it should be placed in the 490/830 combination. Cynthia stated that this would be local practice and not something to enhance OCLC records.

#### **Discussion:**

Suggestions were made to follow cataloging standards and include the series title within the 245 instead of the 246 because and put the portion of the title without the series title in the 246. A concern was made that if the series was not part of the 245, it would impact Pick Lists reports and would be too vague as to which travel book should be pulled and the call number is not varied. Additionally, a comment was made that travel books are a dying collection, and we may not need to focus on them so what would be the upside to standardizing the travel guides. Cynthia stated that travel ebooks are coming up with series searches in Aspen so it will be beneficial for us to standardize the input of the data to ensure that grouping occurs. Next steps will be for Lucas to publish the documentation with the suggested changes and for the Cataloging Libraries to review and comment. The intention will be for this document to be a living document and be edited as necessary. The documentation can be found at <https://support.swanlibraries.net/documentation/94823>.

### **IV. PRE-CAT Course Proposal**

Cynthia showed the PRE-CAT Course proposal to the Cataloging Libraries that was a suggestion from the previous Cataloging Working Group meeting in January. She highlighted the purpose of the course, how it will be set up, what the measurables will be, and the ending goal of preventing duplicates. She warned that it is understood that this will not prevent all duplicates from occurring but would help eliminate some and lesson ticket requests to add these ISBNs. Additionally, she said it will be a separate course focused on print materials only and will go more in-depth of searching before entering these ISBNs as well as receiving a separate certification module. Cynthia mentioned the complexities in policing the certification as it will fall on the Bibliographic Services Team. Additionally, SWAN does not want to create barriers to access. She recommended a six-month probation period for those PRE-CAT libraries partaking in the certification.

#### **Discussion:**

A suggestion was made to make existing pre-cat training required for all libraries or they will be unable to create pre-cats. Cynthia stated that libraries get training in creating pre-cats when they join SWAN, but after that, training is voluntary. A question was asked how many libraries currently use Acquisitions and Sam responded with a third of SWAN libraries. Another suggestion was made to encourage libraries to use vendor records and do batchloading even if they do not use acquisitions or to get more libraries to use the acquisitions module. Cynthia mentioned that Sam's Introductory to Acquisitions online course will be launching soon, and SWAN can use this as an opportunity to do promote using this module more. This will help

with some of the duplication that occurs because more libraries will be adding vendor records that will match existing records. Additionally, a suggestion was made to reach out to the libraries submitting tickets and work with them directly. Finally, a suggestion was made to make the Barcode course that RAILS did a required course for all PRE-CAT libraries. Next steps will be to table this proposal as voted on by the members in attendance at the meeting until we gain more data from Halo's reporting system, improve searching course or do a more robust searching course for print materials, and see if Sam's new acquisitions course inspires more libraries to use Acquisitions module and to do batch import of records.

#### **V. Training checklists in development**

Sam showed the new Training checklist that Lucas, Tara, Crystal, and she have been working on, and she demonstrated what happens when an area was selected for usage and showed how documentation becomes one stop shop for training and documentation. They are hoping to include the webinars. Sam also stated that they were thinking of adding a section for Reference. The website is currently live, but there is no pathway to it without the direct link. This was purposefully done as it is not ready for official rollout.

##### **Discussion:**

A suggestion was made to add a Data entry position, e.g. Clerk, because their employee does not do Cataloging. Cynthia mentioned that Clerk could be used for other areas too that do similar duties. Members expressed overall enthusiasm for everything being in one place on the website. Additionally, forums were encouraged for training/workflow suggestions or questions instead of having people contact SWAN for this since SWAN staff do not do daily routines like member libraries.

#### **VI. Dyslexia friendly materials**

Julie Tegtmeier reported that St. Charles has had parents express difficulty in finding dyslexia friendly materials in the catalog, so they have been adding a 690 Dyslexia-friendly books to these materials. She asked if this heading could be added to all materials that contain dyslexia font. Additionally, she mentioned that bibliographic records use different notes to identify this font. Cynthia stated that SWAN could add the requested heading on the Subject Headings page for others to utilize within their collection.

##### **Discussion:**

A question was asked about where the materials were being ordered from? Answer: Julie uses an external link that links to other vendors at <https://dyslexiefont.com/en/>. Next steps, SWAN to add the 690 to our [local subject heading](#) documentation.

#### **VII. 6XX headings**

Cynthia reminded everyone to remove headings that were duplicated and to not rely on scripts to remove bad headings, e.g. fast, as discussed earlier. Also, she asked if there were any additional subject or genre headings we would like to keep or add. She has already received a request for OLAC headings to be added to the collection and Cynthia will add them to the authority files. Additionally, she had to look at why the MESH headings were not authorizing and suspected the indexing was looking at the subfield 0 as part of the heading. Suggestions were made to keep gttg headings for board games. It was mentioned that the bidex headings are no longer being created. Cynthia mentioned that we should be deleting duplicates even when in a foreign language. Another person mentioned aat headings for Library of Things records. This is a list used by the Getty. Cynthia will also send out links to the [genres/form codes](#) and [subject heading/term source codes](#).

**Discussion:**

A suggestion was made to delete all non-English language headings for English materials and keep for their respective language. e.g. Spanish materials keep qlsp. Cynthia agreed that this was good practice. A question was asked regarding the usage of known unauthorized headings, e.g. for a person as an author/subject. Cynthia mentioned that it is okay to have an unauthorized heading within the system as not everyone or everything will have an authorized heading. She continued to say that subject headings are generally narrow to broad in nature so the narrow topic could be the person's name or subject formatted as a valid heading and the broader terms should be subject headings that are authorized. Next steps, Cynthia to load the OLAC headings, fix the authorization of MESH headings, and send out urls to genres and subject headings codes.

**VIII. Tonies and Yoto updates**

Lucas updated the membership on the changes Tonie and Yoto updates. He provided the guidelines and the link to the article that suggested proper cataloging for these items. The link is found below:

<https://cornerstone.lib.mnsu.edu/cgi/viewcontent.cgi?article=1029&context=olac-publications>.

**IX. Documentation updates**

Lucas spoke about the changes that have been made on the Documentation website. Highlighted were updates to the Large print vs Larger print section on the [590 page](#) and what should be done with both and to the [490/8XX section](#), the new [Pirated AV materials](#) documentation, and the [Pre-Cat Templates](#) and [Pre-Cat Examples](#).

**Next Meeting:** On Zoom, Thursday, July 10, 2025, at 9:30 AM

Adjourned: 11:55 AM