

MINUTES
EVERGREEN INDIANA CATALOGING COMMITTEE MEETING

December 6, 2011

Present:

Judy Hill, Chair (Plainfield Public Library)
Marlane Gutzwiller, Secretary (Madison-Jefferson County Public Library)
Terri Wichman, Upgrade Coordinator (Jackson County Public Library)
Cindy Wilson, Certification Officer (Butler Public Library)
Janet Buckley (Greenwood Public Library)
Sarah Childs (Hussey-Mayfield Memorial Public Library)
Jocelyn Lewis (Lebanon Public Library)
Shelley Lesandrini (Westfield Washington Township Public Library)
Montie Manning (Alexandria-Monroe Public Library)
Amanda Piegza (Indiana State Library)
Shauna Borger (Indiana State Library)
Jason Boyer (IT Specialist, Jackson County Public Library)

Not Present: None

Chairperson Judy Hill called the eighteenth meeting of the Evergreen Indiana Cataloging Committee ("the Committee") to order at 10:15 a.m. on Tuesday, December 6 at the Hussey-Mayfield Memorial Public Library, Zionsville, Indiana.

AGENDA: Borger requested a discussion of processing standards be added to the agenda. Childs made the motion to approve the proposed agenda as amended.

Manning seconded. Unanimously approved.

MINUTES: Wilson moved to approve the minutes of the September 13 quarterly meeting.

Manning seconded. Approved with one abstention.

OLD BUSINESS:

Childs made a motion to approve the revised EI Cataloging Procedures Guide.

Wichman seconded. Unanimously approved.

Borger agreed to post a message on the cataloging listserv with a link to the updated Guide as soon as it is uploaded to the website.

Hill made a motion to approve the revised EI Cataloging Policy.

Manning seconded.

Unanimously approved.

The EI Cataloger Survey scheduled for January was discussed. Wilson will work with Borger to create the survey using SurveyMonkey software. Borger will provide the link to the survey in a weekly update.

Childs advised that the updated EI Cataloging Manual should be completed sometime in January. Committee members have been assisting Childs in the rewrite. More revisions will be needed following the 2.1 update, but should be ready in January.

Boyer led a discussion about creating the profile needed for overlaying with the batch loader. He volunteered to create multiple profiles that catalogers could choose from depending on what type of records were being overlaying and why. Boyer explained that a profile could be created that allows only one or two fields from the imported record to be added to the existing one rather than the entire record being overlaid. This would be particularly useful when working with records for e-resources. Profiles could also be created in such a way that unwanted fields are removed from a record as it is imported. The Committee provided Boyer with information necessary for him to begin creating these profiles for the Consortium.

Borger reported she had discussed our interest in authority control with Bin Lin from Georgia PINES (another Evergreen consortium). The PINES consortium was able to import authority records but has not been able to update them. Updating the authority files requires that the database be exported to the vendor. This proved impossible because the export file is too large. The Committee agreed that the two consortiums should try to work together and discuss this problem with developers, perhaps at the Evergreen International Meeting in April.

It was agreed that the EI Cataloging Committee would host a working group at the International Meeting, discussing topics such as authority records and MARC training.

As a follow-up from the last quarterly meeting, Borger explained that CAT 1 catalogers can find deleted records in Evergreen, but to do so must search by record ID, not the TCN.

The Committee discussed what cataloging functions a CAT 2 cataloger should be allowed to perform. Currently, the system permissions assigned to a CAT 2 login differ from the allowable tasks outline in the Cataloging Policy. After lengthy discussion, Childs moved that only CAT 1 (certified) catalogers be permitted to edit and batch load MARC records and create new records in Evergreen Indiana and that steps would be taken to implement this change effective June 30, 2012.

Hill seconded

Unanimously approved.

Borger agreed to have CAT 2 permissions changed to reflect these new restrictions at the end of June. Although not permitted in the policy, the Committee believes that many copy catalogers have been editing MARC records in Evergreen because their login permissions allowed this. Because only a CAT 1 login will have this capability beginning July 1, the Committee anticipates an increased demand for advanced cataloging training classes. Wilson agreed to include in the January survey questions about who currently edits Evergreen records at the responder's library and how many catalogers plan to attend CAT 1 training before June, 2012.

Borger agreed to investigate how the lead records were chosen during the deduplication project. All agreed that a method of controlling which record is chosen during the merging process is needed before running another deduping script.

NEW BUSINESS:

Judy Hill announced that, for medical reasons, she is resigning her position as EI Cataloging Committee Chairperson and well as the Committee effective at the end of the meeting. Gutzwiller moved that her resignation be accepted, with regret.

Manning seconded. Unanimously approved.

The Committee agreed that the Committee and consortium have grown tremendously since Evergreen first went live and that now was a good time to discuss the creation of a Vice Chairperson position. After lengthy discussion, Wilson moved to create the position of Vice Chairperson to lead the Committee in the absence of the Chairperson, to maintain the EI Cataloging Procedures Guide, and to assist the Chairperson as needed. The EI Cataloging Committee Chairperson would continue to prepare the agenda, be EI Catalog List Serv co-moderator, and represent the Committee at the Evergreen Executive Committee meetings or select another Committee member to attend in his/her place. Included in this motion was the reassignment of maintaining the EI Catalog List Serv contact list to the Committee Secretary.

Manning seconded. Unanimously approved.

Borger announced that two libraries, Akron-Carnegie Public Library and Camden Jackson Township Public Library will migrate to Evergreen this spring, probably in April. Advanced cataloging training is also needed for three libraries that migrated this fall, Dublin, Newton County, and Van Buren County.

Piegza advised that the advanced cataloging class webinar is scheduled for January 18. Manning, Childs, Piegza, and Hill will conduct the training. Hill explained that, although she is leaving the Committee, she plans to continue to assist in the training classes. Piegza noted that she would create temporary CAT 1 logins for attendees to use during the training. Borger advised that the webinar would be recorded and available for viewing either by selected sections or in its entirety via the Evergreen website.

Gutzwiller noted that Hartford City Public Library would very much like to host an advanced cataloging class. Manning agreed to teach a class at that location, possibly in February. He will contact Hartford library to arrange the date and time. Catalogers from Dublin Public Library and Van Buren Public Library could either attend the webinar in January or wait for the February class.

Lewis and Childs agreed to teach an advanced cataloging class in late spring, possibly at West Lafayette Public Library. Borger will confirm the migration date for Camden Jackson Township and Akron-Carnegie libraries and email Lewis, who will contact West Lafayette to see if they are willing to host the class.

Wilson listed the Evergreen libraries not in compliance with the consortium's cataloging training requirements. Borger and Manning will contact these libraries to review the EI Cataloging Policy, advise about upcoming changes in CAT 2 permissions, and tell them about the January webinar.

The Committee agreed to plan spring cataloging roundtables at northern and southern locations for some time in May. Further discussion was tabled until the March meeting.

After a brief discussion, Manning moved that EI catalogers with editing privileges should be advised to delete all 510 (Citation/References note) fields from MARC records before adding holdings.

Lesandrini seconded.

Unanimously approved.

It was agreed that the new Vice Chair would draft a revision to the Procedures Guide to reflect this decision.

After brief discussion, it was agreed that EI catalogers should refer to Hahn's list of Library of Congress genre headings (<http://www.hahnlibrary.net/libraries/formgenre.html>) when determining whether or not to use the lcgtf coding in the 655 field. This link is already provided in the Procedures Guide, so no action was needed.

The need to include guidelines in the EI Procedures Guide for cataloging kits was discussed. It was agreed that this would be an excellent topic for part of the spring roundtables. Hill and Childs agreed to work on putting together an outline for both the Procedures Guide and roundtable.

Borger followed up on questions about cataloging e-resources in Evergreen. She confirmed that by using the 856 subfield 9, the record automatically is allowed to transcend without holdings. Therefore, e-resource catalogers should set all records to *not* transcend as part of the batch load process.

Borger advised that the EI Overdrive consortium plans to discuss the feasibility of adding the consortium's Overdrive records to the Evergreen database at their meeting December 13. Lewis told the Committee that she planned to attend the meeting to explain possible cataloging and patron use issues. With multiple consortiums and individual libraries on the same electronic resource record, the possibility of the 856 field being corrupted or the patron clicking on the wrong link and not accessing the desired material is increased. Lewis pointed out that there is also the question of splitting the cost of the MARC records to be added to the database.

Borger and Manning described problems associated with transited materials that are not easily identified as belonging to a library. Borger will send out a notice to the list serv that ownership must be easily identifiable on all transited materials. Each transited resource must have two highly visible identifying marks such as stamps, stickers, or barcodes. It was agreed that this information should be added to the Cataloging Procedures Guide.

Hill reported that some record templates are not working. Wichman agreed to assume the responsibility of repairing and creating new templates, as needed.

The floor was opened to nominations for the Committee positions of Chairperson and Vice Chairperson. Lesandrini nominated Sarah Childs for the position of EI Cataloging Committee Chairperson and Cindy Wilson for the position of EI Cataloging Committee Vice-Chairperson effective immediately.

Lewis seconded. Unanimously approved.

No other nominations being made, the Committee unanimously elected Sarah Childs as Chairperson and Cindy Wilson as Vice Chairperson.

Childs moved to issue a proclamation thanking Judy Hill for her years of dedication and service as Chairperson.

Wilson seconded. Unanimously approved.

Childs advised she will post a notice to the list serv advising that there is an opening on the Committee, outlining the responsibilities of the EI Cataloging Committee, and asking anyone interested to contact her.

The next Cataloging Committee meeting was set for Tuesday, March 6 at 10:00 am at Hussey-Mayfield Memorial Public Library, Zionsville.

Manning moved that the meeting be adjourned at 2:45 p.m.

Wilson seconded. Unanimously approved.