PrairieCat Technical Services Committee
Draft Minutes
February 13, 2025

ATTENDANCE:

MEMBERS PRESENT: Bonny (PC), Brozovich (RP), Chapman (RL), Dean (WL), Evans (SY), Groth (EM), Landis (PC), Nissen (RU), Sangston (MA), Shippy (MX), Slanicky (PC), Tedder (PC), Totton Schwarz (WO), Zanelli (PC).

MEMBERS ABSENT: Linnell (WL).

GUESTS: Brown (FR), Carter (SL), Elsner (HC), Eychaner (CH), Fane (LP), Fine (PR), Finnerty (NC), Gunn (EJ), Hoste (CL), Hotchkiss (LP), Jones (RP), Kozinski (DK), Lawruk (SE), Lemke (DK), Martin (MP), Mladic (LP), Ni (KR), Parker (MK), Ramirez (DK), Regan (MN), Sciaky (MK), Swanson (CC), Teppen (UT), Thomas (RP), Ward (YK).

1. **Call to order/welcome -** Tedder (PC) began the meeting and welcomed everyone.

2. **Roll call for attendance**

3. **Review agenda for addition/changes** - Added item 10.2 "**Attaching to On-Order/Vendor Records**", item 10.3 "**PrairieCat's WorldCat Discovery Interface**", and item 11 "**Technical Services Committee Vacancy**."

    > Motion made by Evans (SY), seconded by Totton Schwarz (WO) to approve changes to the February 13, 2025, agenda. Motion approved.

4. **Approve minutes for August 8th, 2024, Technical Services Committee meeting.**

    > Motion made by Sangston (MA), seconded by Brozovich (RP) to approve the minutes from the August 8, 2024, meeting as written. Motion approved.

5. **Welcome new MARC Members** - Congratulations and welcome to our new MARC members, Jacob Brown / Fossil Ridge (FR) and Lisa Elsner / Highland Community College (HC).

The next Becoming a PrairieCat MARC member (BAMM) Talent LMS course will begin in April 2025 (specific dates and times not yet determined). This course is for staff members of basic online and fully participating libraries with previous cataloging experience and are Item-entry certified, with a minimum of one year experience performing item entry.

For those who would like to participate that have little or no cataloging experience or would like a refresher, it is recommended to attend the Cataloging Maintenance Center's Cataloging Basics course. Check the L2 calendar to learn more about this CMC course.

6. **Pending products/updates and discussion** – On February 4, 2025, the test server was updated to Sierra version 6.3. PrairieCat staff are testing it to make sure there are no issues.

7. **Membership updates** - Mills and Petrie continue to update their collection and are going from union list library to basic online. Although an official date has not been set, it should be within the next 18 months.

8. **New topics**

   8.1. **Deleting items via Serials check-in cards** – Using the serials module is no longer mandatory. The ability to delete items, despite lacking **permission 125** (Delete item records), was a known issue reported in Sierra 5.2. This meant that one was able to delete item records if they were created through the serials check-in card. These deletions were not included in the discard/withdrawn statistics report. This issue has been addressed and resolved in the current Sierra release (6.1) which means that if one removes their item records when deleting boxes from the check-in card, they will be presented with a pop-up message for an authorized user to login in to perform the action. For batch discard/withdrawal, one can use "Group Modify" or run a review file and request to have PrairieCat staff mark items discard/withdrawal via a help desk ticket.

   8.2. **Vega Discover**

      8.2.1. **Vega Guide** - Vega Guide has been enabled on all Vega sites. Vega Guide is helper text on Vega Discover that can provide a tour of the site and other tips. It is unobtrusive and the user must select the **Take a Tour** button or the other help options. The Vega Guide buttons are on the homepage, the search results page, and the resource page.

      8.2.2. **User roles and permissions** - PrairieCat staff has been working on creating the training and information for user roles and permissions. Once these are up and running, libraries will be able to customize their own Vega homepages. PrairieCat is planning to launch the permissions to the membership in March 2025.

8.2.3. Vega Discover Showcases training - There is a Vega Discover Showcases training course on Talent LMS. After completing this course, PrairieCat Staff will create a login on the Vega staff admin side so the trainee will be able to create showcases. PrairieCat is also offering two Vega Discover Showcases Q&A sessions, on February 2nd at 11am and February 26th at 1pm via Zoom. It is recommended to take the course before attending a session. Homepage builder and site admin training courses will be added in March 2025.

8.3. Member forums - PrairieCat has launched member <u>forums</u>! This was created as a way for PrairieCat member library staff to discuss topics relating to the library field amongst colleagues. They are not a way to communicate with PrairieCat staff, but you might see PrairieCat staff commenting here and there if we've got something to share.

There are many main level forum topics to choose from. To create a sub-topic, click on the main level that best describes your inquiry and then click the **Add a Forum Topic** button. By using the slider at the top of the forum page, you can subscribe to main level forum topics to be notified when a new sub-topic is created. To receive email notifications on sub-topic comments, be sure to subscribe to that specific page.

Forums can be found under the Members tab on the PrairieCat <u>support website</u>. Be sure to read over the <u>Forum policy</u> before creating forum topics and commenting.

You must be logged in with your L2 account to view and interact with the forums.

8.4 IPLAR Q&A sessions - PrairieCat is offering a series of IPLAR Q&A sessions. These are Zoom sessions where you can ask any questions about Sierra-specific statistics for your IPLAR.

These are the upcoming session dates:

Monday, April 14, 2025	**10:00-11:00 AM**
Monday, May 12, 2025	**10:00-11:00 AM**
Monday, June 9, 2025	**10:00-11:00 AM**
Monday, July 14, 2025	**10:00-11:00 AM**
Monday, August 11, 2025	**10:00-11:00 AM**

To find IPLAR information on the PrairieCat support site, you need to be logged in. In the search bar, you can search for IPLAR. The second result will take you to the worksheet. You can download the worksheet. Each section tells you which report is needed. In Talent LMS, you can go to the course catalog and then to reports and scroll down to see the IPLAR course.

9. **PUG Day 2025** - Save the Date for PUG Day 2025. It will be an in-person event and will be held on Friday, September 26, 2025, at the Bend XPO in East Moline, IL. PrairieCat will announce registration and program information once it is finalized.

10. Reminders

10.1 Paperback vs. hardcover / matching criteria - We've received several tickets and emails inquiring about matching, specifically whether a paperback can be added to a hardcover bibliographic record. This information is available on the PrairieCat support site under **Resources > Policies and Procedures > Technical Services**, **How Do I…?** > **Bibliographic records** > **How to find a matching bibliographic record for your item** > **Match points and core elements**. The easiest way to find it is by searching "**match points**" in the **Search** box.

Now, regarding the question of whether a paperback can be added to a hardcover bibliographic record, the answer is: it depends. The rigidity of a book's cover does not dictate which bibliographic record it should be attached to. Instead, it's the match points and core elements, including pagination and sizing, that determine the appropriate record. According to cataloging rules, if the ISBN numbers for other formats are listed on the item (e.g., large print), all the numbers should be in the OCLC record. The ones that do not apply to the item in hand are preceded by a "z" and are stripped out in MARC Report but are kept in the OCLC record.

In addition, there should be no more than a three-page difference when the total number of pages exceeds 10 pages. For example, 350 pages versus 352 pages is considered a matching record. Any difference in paging for items with fewer than 10 pages (e.g., 7 pages versus 8 pages) is not a match. If it is not a match, a new record needs to be created in OCLC.

10.2. **Attaching to On-Order/Vendor records** - It seems there is a misconception that library members are unable to attach item records to on-order/vendor records. This is a friendly reminder that neither Sierra's policies nor any system restrictions prevent a member from attaching an item to an on-order bibliographic record. The key consideration is whether there is enough information in the bibliographic record to allow the member library to make a valid "match." As detailed on the PrairieCat support site, members can request an upgrade of an on-order bibliographic record to a fully cataloged OCLC record—if available—by submitting a help desk ticket. However, it is ultimately the responsibility of the ordering library to upgrade the bibliographic record within one week of receiving and attaching their item, in accordance with PrairieCat policy.

10.3. **PrairieCat's WorldCat Discovery Interface** - Earlier this year, Tedder (PC) sent an email to the technical services group regarding the WorldCat Discovery Interface.

For those who do not have access to FirstSearch or are unfamiliar with WorldShare Record Manager or Connexion Client, Tedder (PC) has been recommending WorldCat.org as a resource to search for matching bibliographic records not available in PrairieCat's database. However, it has recently been found that WorldCat.org consolidates related editions and formats under a single representative record, which can complicate the process of finding matching records for import into Sierra.

For members without direct access to FirstSearch or WorldCat Discovery, it is now recommended using the WorldCat Discovery Interface available through PrairieCat's subscription. You can access it at https://pals.on.worldcat.org, which provides a more efficient way to locate matching bibliographic records for import into PrairieCat's database. When viewing search results, be sure to select the **"Show all"** option

11. **Technical Services Committee vacancy** - We have a vacant seat to fill, previously held by Kat Solheim from Nippersink (KR), who served in a Tier 2 Public seat. Kat is no longer at Nippersink, and we'll greatly miss her!

Per changes to the bylaws, the standing committees can have one representative each from Tiers 1-3, one representative for academic, school, and special libraries plus seven at large representatives from any library. Due to these changes, this seat is now available as an At-Large seat. We are currently seeking a volunteer to fill the remainder of Kat's term, which will expire on June 30th, 2025.

Please note:

- Appointments to fill this vacant seat do not count against the consecutive term limitation.
- A special election is not required.
- The Committee may appoint a volunteer for the remainder of the fiscal year, and they will be eligible for election next year.

If no nominations are received to fill the seat, the size of the Committee will be adjusted accordingly until the next election cycle. The role of committee members is to make motions and vote. A quorum is required to be able for the committee to be able to vote. The committee meets every other month on the second Thursday except for December.

Yo Ni from Nippersink (KR) was the first person to volunteer to serve on the committee until June 30. 2025. There will be five vacancies on June 30, 2025, and the election will be in May.

> Motion made by Totton Schwarz (WO), seconded by Groth (EM)) to accept Yo Ni as a new At Large committee member to fill the position vacated by Kat Solheim. Motion approved.

12. BYPT "Bring Your Problems Time" – Groth (EM) had a patron with a hold. The EM item was returned and checked in but triggered a hold for a patron at a different library. Landis (PC) needs the patron and item information to check on it. When this happens, try to report it within hours to the help desk so PrairieCat staff can track it down. Sometimes this happens when another library checks in an item on the same bib record and the item traps the hold for the patron and puts the item in transit.

13. **Ideas for "Did you know?"** – Please send ideas for "Did you know?" to any of the PrairieCat staff.

14. **Review of meeting, what worked and what did not** – There were no comments or suggestions.

15. **Questions, comments, etc.** – The time for the next meeting is listed as 9:00 am on the agenda and should be 9:30 am. Tedder (PC) will correct it.

16. **Adjournment** – The meeting was adjourned at 10:30 am.

17. **Next meeting – Thursday, April 10, 2025, via Zoom @ 9:30 AM**

MARC/MARC-trainee Catalogers meeting to follow Technical Services Committee meeting. (Zoom session will be open @ 11:00 AM but meeting will start at 11:15 AM)