



**PrairieCat Technical Services Committee  
Approved Minutes  
April 11, 2019**

**ATTENDANCE:**

**MEMBERS:** Bonny (PC), Brozovich (RP), Chapman (RL), Conderman (MS), Dean (WL), DeBord (YK), Fine (PR), Landis (PC), McSweeney (HD), Shippy (MX), Slanicky (PC), Tedder (PC), Zanelli (PC).

**GUESTS:** Alberth (EJ), Barnes (RU), Blask (FP), Breneman (CC), Groth (EM), Kessler (CC), Kozinski (DK), Maine (TF), Sangston (MA), Schulze (DK), Sciaky (MK), Swanson (FR), Tepen (UT).

**ABSENT:** Lien (PC), Clark (PE).

- I. **Welcome** – Fine (PR) welcomed everyone.
- II. **Roll call for attendance**
- III. **Review agenda for additions/corrections** – Add to Section III. Other: Lost/Paid, In-Process reports.
- IV. **Approval of minutes from: February 14, 2019**

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| Brozovich (RI) moved and Dean (WL) seconded to approve the minutes from the February 14, 2019 meeting with corrections. Motion passed. |
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- V. **FY20 Committee roster and meeting schedule** – There are five openings on the committee and you can nominate someone. For the meeting schedule, we have one meeting remaining for this calendar year, which will be on June 13. Will discuss the in-person meeting this fall in section XI of the agenda. Bonny (PC) will send an email with the rest of the meetings for the calendar year.
- VI. **Pending Projects/Updates:**
  - a. **Matching class** – The first matching classes were held with the Northern8 libraries. Tedder (PC) welcomed the Northern8 members that were at the meeting. All of the classes went well. When made official, it will be a prerequisite for the Item Entry class and can be recorded to become an on demand class. The matching class will be used to lighten the load of the Item Entry class and will cover matching and preparing for the barcode

test. The Item Entry class will focus on the actual module and functionality of adding items without overloading the students with too much information.

- b. Connexion I class** – The manual for the Connexion I class has been created. It was originally for the MARC members. Trying to make the process to becoming a MARC member easier. There are three manuals that have been created for Connexion: Set-up, Connexion I and Connexion II. Libraries can send in a **.dat** file instead of a **.txt** file for PrairieCat staff to load the records into Sierra. Contact Tedder (PC) directly if more information is needed. It was recommended to send the documentation to everyone. Tedder (PC) will create one PDF packet to send to the Technical Services group. Contact Tedder (PC) if one is not on the mailing list.
- c. Call Number Conversion project** – Landis (PC) and Lien (PC) continue to work on the call number conversion project. Lien (PC) will be retiring after the Northern8 project is completed. The other PrairieCat staff have been working on the Northern8 project and haven't been working on the call number conversion project. Once the Northern8 project is finished, more effort will be put into converting call numbers.
- d. Northern8 Project** – There are a lot of things going on to make the merger successful. By April 23<sup>rd</sup>, the Northern8 libraries will Go Live on Sierra. May 6 acquisitions and serials Go Live. May 13 patron records will be loaded. May 21 Go Live on Sierra for circulation. Lots of meetings and training are going on. Bib records are being loaded in a two part process with 250,000 records processed on April 10. Innovative is loading in bib records first, then item records. When Innovative loads bib records for the Northern8 libraries, they are entering a 938 tag containing the bib record number from the NIC server + other specific information to the existing PrairieCat bib records. Where a matching bib record (based on the 001 tag) was not found, the N8 bibliographic record is added to PrairieCat (with a 938 tag). It is the 938 tag that is the match point for the loading of items, and will be the match point for the loading of serials and acquisitions information. **DO NOT REMOVE** the 938 tags. If a bib record does **NOT** have a 938 tag in it and one needs to merge **FROM IT**, that is OK. If a bib record **LACKING** a 938 tag is removed from the system, that will **NOT** affect the future Northern8 data loads (i.e. serials, acquisitions, circulation transactions). Merging will resume after all the Northern8 libraries are added. One will begin seeing Northern8 records starting April 10.

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|-------------------|-----|--|--|---------------|-----------|-----------|
| Old system number | 938 |  |  | .b24452543NIC | b04-10-19 | c10-17-17 |
|-------------------|-----|--|--|---------------|-----------|-----------|

The Northern8 libraries used monographic titles for serials (ie: Fodor's) that will be changed to volumes. Northern8 records that need to be volumized will be cleaned up by PrairieCat staff. The Northern8 items

will not be holdable until May. The Northern8 project will also be discussed at the upcoming circ meeting.

- e. **CMC project update** – CMC is doing a cleanup project for PrairieCat. So far, 43 bib records have been merged, 43 record overlaid, and four records deleted. The process has been slow because CMC has projects from the Illinois State Library that need to be completed by July 1.
- f. **Adult and Young Adult Scopes** – Several years ago during the PrairieCat planning process, member libraries identified that it would be useful to have an “All Adult” and an “All Young Adult” limiting feature in Sierra and Encore, similar to the existing “All Juvenile” limit. These limits are built on item-level locations, and grouped into new scopes. The limiting may not be 100% accurate particularly for members that don’t have item-level locations that specify adult or young adult materials. Both item level locations and the scopes can be tweaked in the future as needed. The Adult and Young Adult scopes are going live in Sierra and Encore at the beginning of April, before the final load of Northern8 holdings. If a search yields results that are in one of the age scopes, the option to limit using the facets will be seen on the left. In Sierra, one will be able to limit to his or her library’s adult results or young adult results.
- g. **Badging program / strategic plan initiatives** – Talent LMS is training software that will be used. PrairieCat staff discussed training at the PrairieCat staff meeting on April 9. Pathways were discussed, so staff can be directed to the different classes, where to start, and which classes one needs to take based on his or her job position. PrairieCat staff are getting closer to rolling it out so everyone can use it. It isn’t only for PrairieCat staff; libraries will be able to use it for their own staff training.

**VII. Review of policy of formatting of volume records** – At the last meeting we discussed changing FALL to “FAL” in the volume records. There are 3-character abbreviations for the seasons except for FALL, which is four. This was from Sirsi. It would be difficult to go back and change all of them. It was recommended to leave it as “FALL”.

**VIII. Weekly magazines – Suggestion to merge older years to original periodical title** – Because of the large number of items attached to weekly magazine bib records, it takes longer to load, so PrairieCat staff have split the records into annual records. If one is weeding weekly magazines and all of their items are gone for a particular year, make sure your holdings statement gets removed. Most libraries have weeded their 2017 records and older. The bib record for 2017 may only have 100 items left and could be merged to the original volume record. It was agreed to keep the original volume record and the annual volume records for the current two years. Since this is a database cleanup, an official vote was not needed. Chapman (RL) volunteered to merge some on April 13-14. Tedder (PC) will send a list of weekly periods to Chapman (RL).

**IX. Bib 090 call number update** – PrairieCat staff have been testing this. Other call numbers have been showing up in the black banner at the Sierra summary screen.

Dewey numbers and LC call numbers are displayed. In a Northern8 acquisitions meeting with Mike from Innovative, it was explained that Innovative doesn't use the actual MARC tag (050, 082, 090), it uses the type of tag, called a "c" tag. The tags are categorized behind the scenes. The committee had discussed removing any call numbers from the display. The committee decided to remove the call number display from the black banner. PrairieCat staff will follow up with Hutchinson (PC) to remove the display.

- X. New material types updates** – The new material types have been added but we don't have icons yet. They have not been added to the validation table. It is difficult to run a review file and find material types, so the material types will need to be watched carefully and changed. Open a Help Desk ticket if one is unable to fix a material type.
- a. Preloaded tablets** – Has been added and is being utilized. The code is "pt".
  - b. audio-enabled book** – Has been added and is being utilized. The code is "ae".
  - c. Digital Images** – Has been added, but not in use yet. The code is "dp". You will begin seeing these in the Northern8 records. PrairieCat libraries can also use it.
  - d. Slides** – Has been added, but not in use yet. The code is "sl". One will begin seeing these in the Northern8 records. PrairieCat libraries can also use it.
  - e. Book + Disc or Book with Disc** – The committee had talked about BOOK + DISC, but we will use **Book with Disc**. The code is "bwd". Not in use yet.
  - f. Graphic novel** – Suggestion for material type for graphic novels. Some libraries have different ideas of what a graphic novel is. If used, we need a good definition and when to use it in the Policy & Procedure manual. A graphic novel is still a "book". If it's a continuing story, does it need to be a volume? Will table until further research and discussion can be done.
  - g. Others?** – No other recommendations were made for additional material types.
- XI. 2019 In-person TSUG meeting Oct 10, 2019?** – The members agreed to have a face-to-face meeting. We will update the policy and procedure manual if there are no agenda items. The date will remain the same. Bonny (PC) will do a Doodle poll to determine the location. Recommended sites are: Reddick, Moline, or Rockford University. Meeting time is 10-3. Phone conferencing will be

available for members who are unable to attend in person and members can leave early if needed.

## **XII. BYPT ‘Bring Your Problems Time’**

- a. **6XX Subject Tags** - Teppen (UT) had contacted Tedder (PC) about a boolean “not” search when searching for a non-fiction research topic. PrairieCat is removing any 6XX tags, 2<sup>nd</sup> indicator 4. These are local assigned subjects with no source given (not bisac, etc.). The records can still have 6XX tags with non-fiction subjects. It is hard to teach people to do a boolean search. The fixed field has 0 or 1 to indicate if it’s fiction or non-fiction. Bonny (PC) will send the suggestion to the OPAC committee to maybe add a new facet based on the fixed field 0 or 1 for fiction or non-fiction.

## **XIII. Other**

- a. **LOST AND PAID** – Chapman (RL) report that create list won’t let one sort by date. Libraries would like to have a monthly LOST AND PAID report. Some items have been replaced and the old item is still listed as LOST AND PAID. The committee would like PrairieCat staff to run a monthly LOST AND PAID report to send out to the libraries. PrairieCat staff will run and distribute a monthly LOST AND PAID report after the Northern8 project is completed.

### **According to the PrairieCat Item Status & Values Definitions:**

This status is software assigned only. Do not change any items to or from this status manually. Definition: Item was LOST and the patron has paid for it. The item status changes to LOST AND PAID when a payment has been fully made for a billed or lost item.

- b. **IN-PROCESS** – Should be run every 30 days. PrairieCat staff will run and distribute a monthly IN-PROCESS report after the Northern8 project is completed. The IN-PROCESS report will also be discussed at the circulation meeting this month. Moline keeps current magazines as “IN-PROCESS” until the next issue arrives and doesn’t want the items to be automatically changed. Reddick uses “LIB USE ONLY”, but all items need to go back to technical services for the status to be changed. Checking in the item changes the status from “IN-PROCESS” to “AVAILABLE”. Could change the time on the report from 30 to 60 days, but some magazines are quarterly and need more time. Chapman (RL) suggested a Doodle poll to find out how many days libraries keep things IN-PROCESS. The IN-PROCESS report could be an informational report run monthly for libraries to use as needed. If a report is used to automatically change an item status from IN-PROCESS to AVAILABLE, the item needs to be checked in to catch any holds.

### **According to the PrairieCat Item Status & Values Definitions:**

This status is assigned manually by library staff. Definition: Newly acquired item being physically processed and may not be accessible for patrons. Items with this value must be checked in to change status to “-AVAILABLE” before shelving. PrairieCat procedure: a list of items that have had this status for 30 days or longer is supplied for libraries to check shelves and resolve. If found, check in the item.

**XIV. Review the TSUG manual – Tabled for now.**

**XV. Next meeting is Thursday, Jun 13, 2019 9:30 AM - 11:00 AM, via GoToTraining, 9:30am – 11:00am.**

**MARC/MARC-trainee Catalogers meeting (11:15-1:00) to follow Technical Services Committee meeting.**