

**MINUTES  
EVERGREEN INDIANA CATALOGING COMMITTEE MEETING**

March 19, 2013

Present: Sarah Childs, Chair (Hussey-Mayfield Memorial Public Library)  
Marlane Gutzwiller, Secretary (Jefferson County Public Library)  
Miriam Bunner ( Mooresville Public Library)  
Margaret Carter (Culver-Union Township Public Library)  
Shelley Lesandrini (Westfield Washington Township Public Library)  
Christie Whitton (Peabody Public Library)  
Jocelyn Lewis (Indiana State Library)

Not Present: Jennifer Steffey (Noble County Public Library)  
Mary K. Emmrich (Newton County Public Library)  
Shauna Borger (Indiana State Library)

Chairperson Childs called the twenty-third meeting of the Evergreen Indiana Cataloging Committee (“the Committee”) to order at 10:15 a.m. on Tuesday, March 19 at the Hussey-Mayfield Memorial Public Library, Zionsville, Indiana.

**AGENDA:** Lesandrini made the motion to approve the agenda with an added item addressing the use of circulation modifiers and shelving locations.

Bunner seconded. Unanimously approved.

**MINUTES:** Lesandrini moved to approve the minutes of the December 6 quarterly meeting.

Carter seconded. Unanimously approved.

Childs welcomed Christie Whitton of Peabody Public Library to the EI Cataloging Committee.

Childs also noted that Janet Buckley has resigned. An announcement regarding this new vacancy will be posted on the list serv.

**INDIANA STATE LIBRARY REPORT:**

The State Library is planning three months of testing prior to the upcoming 2.3 upgrade. Lewis will request that the Committee be given specific instructions and guidance about the kind of testing needed and how to report the findings. Childs noted that 2.3 will probably not display the 264 in the summary. Searching by shelving locations will also be in a future upgrade.

Lewis discussed the challenges with ‘fixing’ the GPO electronic documents that display whenever Evergreen members search their own library. Although using a subfield 9

would prevent display, it would also prevent the URL from displaying for the owning library whenever an 'everywhere' search is selected.

The State Library is having difficulty identifying and removing from Evergreen the NetLibrary eBook records purchased from EBSCO. Net Library cancelled the license with EBSCO and the URL links no longer work.

### **OLD BUSINESS:**

The new target date for the updated EI Cataloging Manual is August 2013.

The Advanced Cataloging class scheduled for next week will be recorded and uploaded to the website. Members expressed concern about what was now being taught by the regional coordinators in the basic class and whether there was material not being covered in either training. Some material previously covered in the copy cataloging class should now be shifted to the advanced class because of changes in CAT 2 permissions. Lewis volunteered to sit in on the next basic EI cataloging class. Childs pointed out that instructions on how to import copy editor templates from CAT 2 to CAT 1 logins should be added to the advanced training agenda.

The EI Cataloging Procedures Guide, recently revised by Gutzwiller, Lewis, and Childs, was discussed. The new Guide is complete except for local RDA procedures to be agreed upon during this meeting.

Preparation for the migration to RDA was discussed. Childs noted that she plans to teach a "RDA for Everyone" type class at the annual Evergreen meeting. Bunner and Childs expect to have RDA templates for monographs, DVDs and possibly other types of records completed by April 1<sup>st</sup>. Childs will post a RDA announcement to the cataloging list serv on or about March 31<sup>st</sup>. The posting will include information about training opportunities, new RDA cataloging templates, the Spring Roundtable, and the revised Procedures Guide. She will instruct catalogers to not convert RDA records to AACR2 standards, advise that it is each cataloger's responsibility to seek RDA training, include helpful links, and explain that catalogers will not be required to original catalog in RDA until at least next year.

Local procedures for some optional elements of the RDA standard were discussed. It was agreed that Evergreen Indiana catalogers should:

1. Join LC and IUB libraries in continuing to use ISBD punctuation.
2. Continue with AACR2 transcription practices for capitalization. (It was noted that titles in all caps are still not acceptable.)
3. Continue current procedures regarding transcribing ISBNs. (Still okay to abbreviate descriptions such as 'pbk.' and 'library ed.')
4. Continue removing inappropriate ISBNs even if they appear on the resource.
4. Continue current procedures regarding variant title. Provide 246 fields for parallel titles, corrected titles, titles with numerals in the first five words, and any other variation deemed useful by the cataloger.

5. Accept the Statement of Responsibility (245 subfield c) as found in the record but enhance by transcribing additional honorifics, titles, etc. as deemed useful or appropriate by the cataloger.
6. Not be required to transcribe all names into the Statement of Responsibility but either accept the record as found or enhance it by adding additional names. Catalogers must include at least one name in each grouping, noting omitted names with the bracketed phrase like “[and four others]”. (This replaces AACR2’s “Rule of Three”)
7. Follow LC guidelines for adding access points for contributors (7xx fields), using subfield e for descriptions.
8. Add a 336, 337, and 338 field for each format when cataloging titles with multiple formats. Subfield b is not required.
9. Follow IU’s approach for adding translation information to a record and use fields 240 and 7xx. If information already in the record, accept as found.

Gutzwiller made the motion to approve the above RDA local consideration decisions and the revised EI Procedures Guide with the understanding that the RDA related information would be incorporated into the Guide before being published at the end of the month.

Carter seconded.

Unanimously approved.

About 50% of member libraries responded to the annual survey. Childs will ask Steffey to send a follow up request to the libraries that did not complete the survey.

Childs updated the Committee on her efforts to update the search filters. Although some filters previously ‘broken’ are now functioning, many changes cannot be made until the 2.3 upgrade.

Lewis and Childs agreed to present the Spring Roundtable webinar. They will work with the State Library to set a date for mid-April.

#### **NEW BUSINESS:**

Lewis reported that only about 20% of records actually merge during a migration. Adam Bowling is discussing ways to improve this with Emerald. Matching parameters for migration merging have been much tighter than those used for deduplication. The Committee favors a move toward less restrictive matching points.

The Committee discussed how to approach scheduling future advanced cataloging classes. Fewer libraries are now migrating, so the demand for classes is not great. Childs agreed to post a message on the cataloging listserv advising member libraries to contact Steffey whenever advanced training is needed due to change in staffing, etc.

Lewis announced that the State Library is looking for a source for RDA authority records. Evergreen is now capable of managing authority records, so authority control is now possible.

Childs noted that the default item status when catalogers use the Fast Item Add function is “available” but the status is “in process” if the cataloger adds items via the Holdings Maintenance screen. Childs will submit a help desk ticket and request that the default for both is “in process”.

Discussion of the agenda item addressing cataloging Overdrive records was tabled.

Childs alerted the Committee that the ILF Program Committee may request a presentation on Evergreen cataloging.

Fall Roundtable ideas discussed included the 2.3 upgrade and the importance of the 007 field for DVDs and Blu-ray bibliographic records. The upgrade will enable videorecording searches by format and DVDs and Blu-rays will have different icons. This will be driven by the coding in the 007 field.

The Committee discussed email etiquette and problems with catalogers not responding to email requests for information.

Items with unset circulation modifiers and shelving locations were discussed. The circulating library must be able to categorize an item in order to include it in circulation statistics. Items with the default “stacks” shelving locations are not included in Evergreen circulation reports. Evergreen catalogers should be encouraged to correctly set circ modifiers and shelving locations.

The June quarterly meeting will be scheduled via email. The meeting adjourned at 2.00 p.m.