MSC CMC Meeting Minutes
September 3, 2025, 11:00 – 12:00 pm
Submitted by Anders Johnson

CMC Members Present: Sydnie Tallman, Jodie Moore, Paulette Parpart, Lyndy Parke, Elizabeth Fellerer, Kat Wilson, Aaron LaFromboise, Courtney Lujan, Anders Johnson, Carly Delsigne

MSC staff present: Amy Marchwick, Laura Tretter, Mel Carroll, Keiley McGregor

Guests present: Katie Burkhalter, Hannah Mundt, Hilary Woodward, Cindy Thomas, Jennifer Ball, Maren Engen, Megan Thomas, Alina Prunean, Caroline Campbell

I. General library announcements
   a. Sydnie Tallman (State Law Library): Due to staffing and space issues, the law library is getting rid of most of its microfiche
      i. They are keeping anything Montana related and tribal related
      ii. MSC staff offered to assist with Workflows discard aspect of this project if needed
II. Review of minutes from last session - no comments
III. Call Number Analytics - Update on Implementation
   a. Laura provided a recap of overall changes:
      i. The MSC updated recommendations to attach manga and other serials to separate bib records rather than having them all on one shared record
      ii. Workflows has been changed to stop forcing |z delimiter (for Dewey Decimal libraries); now it needs to be manually inserted
      iii. DVD call number analytics process has been updated as well: libraries should now be putting DISC 1, DISC 2, etc. so that patrons can put holds on specific disks as needed
      iv. Updates have been made to the volume sort drop-down in Enterprise, helping patrons place holds more easily; overall these changes have normalized things on the back end
      v. KB article has been updated; Laura provided link in chat:
         1. https://ftpaspen.msl.mt.gov/EventResources/20250807132503_29279.pdf
         2. Laura recognized that the article is big, but it reflects all of these new changes
   b. Laura stated she will continue to break apart manga records, noting that this can be a time-consuming process
   c. Paulette asked about specific instructions for splitting Manga
      i. Laura: There are not specific steps for splitting manga in KB currently. Anyone can update these bibs though, there are KB articles on relevant fields, e.g. 490, 245, 830, etc.

       ii.   Laura shared KB article for series statements: https://montana.servicenowservices.com/citizen?sys_kb_id=dc9016 6047fe5250428a7d88c26d4358&id=kb_article_view&sysparm_rank= 1&sysparm_tsqueryId=d57c654d47ffae14f06c0bd2e16d43d2

d. Amy added some context, noting that "Backroads of Montana" on VHS and DVD revealed a lot of these issues with call number analytics across the consortium

. Paullette: For series that are issued every year, should these be put on different records?
       i.   Laura: Yes

a. Laura: In terms of splitting records, manga and graphic novels are the system administrator's highest priority right now
       i.   Amy: Manga and graphic novels are a priority because they get a lot of holds on them. The MSC administrators may identify other records they want to split after working through these higher priority records
       ii.   Amy clarified that there won't be a requirement for MSC libraries to go back and split out old records as a project. That is, the MSC is not enforcing a requirement that existing records need to be retroactively fixed or remediated to reflect this new process.
       iii.   Caroline: Caroline's library has been splitting travel book serial records into monograph records, in addition to graphic novels, manga, etc.

b. Laura noted some benefits of splitting out serials this way, including much more detail and description of specific volume, specific year, etc. Overall, this will enhance patron searching

c. Laura added that the new process whereby the system is not automatically adding |z seems to be working well

d. Larura: Regarding DVD call number analytics, the MSC administrators have been getting more tickets about this. Amy has a method for batch updates to help make these more consistent. They are asking everyone to stick with it and be consistent

e. Laura went over how drop-down sorting has changed:
       i.   The hold drop-down list in Enterprise now sorts by most current to older which is more intuitive for patrons
       ii.   Blank options are sorted such that they appear at the bottom of the list, not the top. The blank option is for any item that doesn't have a call number analytic on it. MSC staff know that some patrons were selecting blanks in the past which may have been confusing for them, now that the blanks are at the bottom this will help reduce confusion. Amy did a lot of cleanup in this regard so this will be less of an issue
       iii.   Amy: Ideally, if everything is set correctly, then there will be no blank line in the drop down

f. Overall MSC staff continue to work on these updates
       i.   Laura asked others if they have noticed improvements

          ii.   Amy noted that reports do show a reduction on stuck holds since they did some of these splits / batch fixes

IV.   OCLC Streamline Holding Sync
- a. Laura: This refers to a process that is going to get holdings in OCLC to match holdings in Workflows; having those matching is important for ILLs, research requests, etc.
  - i. Laura noted that this is a free process, so they don't get quite as much support from OCLC
  - ii. Laura: MSC system administrators are planning to do this quarterly; They feel confident they can handle this
- b. Laura: So far, MSC system administrators sent OCLC a batch of 12 files on July 30 broken into two 'collections.'
  - i. One collection was to match holdings based on OCLC number (035 field)
  - ii. The second collection was to do full record matching:
    1. If a library brings in an OCLC record and then makes significant edits in Workflows but forgets to take the OCLC number out of record, this would be a case of a full record mismatch.
    2. For instance, if someone imported a record for a Minnesota yearbook from OCLC and then edited the record to instead be for a Montana yearbook without removing the original OCLC number, this would mean the there is a full record mismatch between what is in Workflows vs. OCLC.
    3. Overall, this is not the best practice for cataloging. We also don't want to junk up OCLC with duplicate records. This new process will try to prevent these kinds of issues / mismatches as much as possible.
- c. Laura mentioned that WorldCat Staging is where they can review and deal with the mismatched records
  - i. To correct full matching errors, if a WorkFlows record does not correspond to an existing OCLC record, this process will add said record to OCLC, assuming it meets their standards
  - ii. Currently the MSC system administrators have over 3000 unsolved records in WorldCat staging to fix. Laura noted that this may be a partial count, they need to look at the reports more closely and then assess what they can realistically handle
- d. Laura: This syncing process excludes certain types of records, such as brief records and book club items. Book club items in general need some help, there are problems with libraries attaching their holdings to the wrong record, forgetting to take the OCLC number out, etc. The MSC administrators want to dig in more when it comes to book club items.
  - i. Paulette was not sure if her library is removing OCLC numbers where appropriate; Paulette offered to help with this process if needed

        ii.   Laura: There is a KB article on the process of removing OCLC numbers in Bookclub kit records. There are two BCA reports that can help with this as well.

        iii.   Amy: If your library has book club / kits cataloged, the specific records need to be looked at. They are harder to batch fix because there could be a mix of problems going on.

    e.   Laura reiterated that the plan is to do this syncing process quarterly, though they haven't scheduled next quarter yet as they are still working through this first one. Laura added that MSC libraries should start looking at their holdings in OCLC to see if they are improved.

    f.   Laura: Special libraries such as the State Law Library and Montana Historical Society library are really out of sync, and probably the MDT library as well.

        i.   Amy provided further context, stating that in either the 2019 or 2022 reclamation, a setting was wrong on the OCLC side such that a lot of special libraries lost their holdings in OCLC.

        ii.   Amy added that the MSC system administrators are excited about this process wherein everything in Workflows will be given an OCLC number (035). However, they can only do a certain number of these a day. The end result will be a cleaned up 035 field with the proper OCLC number.

    g.   Laura noted that the old reclamation process was done every 3 years or so, so doing this new process quarterly will sync records up a lot better.

    h.   The MSC administrators made some comments about how MSC libraries can help with this process:

        i.   Laura: Go back and revisit brief records; make sure these are cleaned up and up to date. Brief records are only meant to be temporary circ records for ILL, etc.

        ii.   Amy: If you create brief records for ILL, make sure the properties are set so that the bib format is "brief" and not "MARC" and this will help to exclude these records from this syncing project

        iii.   Paulette asked how these misclassified brief records can be caught

        iv.   Amy described a batch process where she can find anything that is an empty bib and that she has a way of cleaning these in batch now.

        v.   Amy: In terms of helping this process, Amy reiterated that libraries should not delete the last item on a bib record; instead, do a discard. Otherwise, deleting the last item leads to a mismatch between Workflows and OCLC holdings.

V.   Library of Things

    a.   Laura stated that the discussion of library of things could be reserved for a later meeting since time was running out

    b.   Laura is working on a KB article which will include instructions for cataloging objects, realia, and other general guidance. Laura will publish this soon and encouraged the group to call out articles that could use more specific guidance or be expanded

    a.   Paulette: Asked how to attach 856 field to records
        i.   Laura: There is a KB article on 856 fields

VI.   Bibliographic Flip Headings

    a.   Laura: With this new process, SirsiDynix will update older versions of names, subjects, and series titles in Workflows bib records to use authorized headings while correcting various punctuation errors, etc. This includes 1xx, 6xx, and 7xx fields.

    b.   Laura: Noted that this will be an annual process.

    c.   Laura clarified that this will not fix all punctuation errors or inconsistencies (which can lead to duplication of facets in Enterprise). For instance, different punctuation with subfield e (for relator terms) won't be corrected in this instance. Nonetheless, this is a step in the right direction

    d.   Amy noted that this round of the flip heading process will make 173,000 changes to records

VII.   Closing Comments / Questions

    a.   Katie asked how to suppress URIs in records
        i.   Laura: They should be suppressed already in Enterprise. They will be visible in bib records Workflows, however. We can suppress them in specific wizards in WorkFlows.

    a.   Paulette is currently cataloging Nez Perce Clearwater 15 vol report which she will put on one record
        i.   Amy clarified that if the 15 volumes are part of a set, then it is ok to put them all on one record and not split them into separate records

    b.   Jodie asked if people have been seeing more self-published books / adding these to the collection. In Red Lodge there has been an uptick. Jodie noted that this requires more original cataloging work.
        i.   Laura: Has not personally seen an uptick but reiterated that the MSC system administrators can still provide original cataloging assistance
        ii.   Paullette: Missoula writers are putting a lot these types of materials out as well

    c.   Laura reminded participants that they can suggest agenda items for upcoming meetings. The next CMC meeting is scheduled for December 3rd