Final RSA Database Committee Meeting
Friday, May 17, 2024
1:00 – 3:30 pm

Participants: RSA Member Libraries

Chair: Jennifer Williams, Normal Public Library

Location: Virtually via Zoom

Helpful meeting links:
- Agenda: https://support.librariesofrsa.org/wp-content/uploads/2024/05/Participant_Agenda_DB_Mtg_2024-05-17.pdf

- Presentation slides: https://support.librariesofrsa.org/wp-content/uploads/2024/05/Slides_DB_Mtg_2024-05-17.pdf

- Recording: https://www.youtube.com/watch?v=xf4_ACp_ZIg

1. Introductions (*J. Williams*) <mark>Time in recording: 00:00:00</mark>
   The recording was started a moment or two after the start of the meeting. Attendees introduced themselves. Jennifer Williams informed attendees that the notes, recording, and slides would be made available later via the RSA listserv.

   Erica showed where the Agenda is available on the RSA Support site:
   https://support.librariesofrsa.org/meetings/committees/database-committee/

2. Updates:
   a. RSA Independence Project Update (*K. Orrison*) <mark>Time in recording: 00:02:40</mark>
      o To learn more about the RSA Independence project, please visit the RSA independence project page here**.**
      o Make sure you are subscribed to the RSA listserv to receive updates about this important project: https://librariesofrsa.us14.list-manage.com/subscribe?u=daf9552c791131dbb39a40e2a&id=27222f98cc
      - 117 IGA's returned so far. IGA's returned from Publics: 83, Schools: 29, Academics: 3, Specials: 2
      - RSA has not heard from 9 schools. The Operations Department is working to contact these schools.
      - 4 schools have confirmed they will be leaving RSA.
      - As of July 1st, 2024, all RSA member libraries will have the same membership level and same access to RSA services. Additional toolbars in WorkFlows will be available in late June or July for current Basic Online libraries. WorkFlows training will be needed and available later in 2024.

- o RSAcat issues
    - Recently cataloged items are not appearing in RSAcat.
    - Backend synchronization between the WorkFlows server and the RSAcat is not working properly.
    - ERC (E-Resource Central) synchronization cycles are also not working properly, which negatively impacts Overdrive, Hoopla, and eRead Illinois.
    - To fix these issues, SirsiDynix will move the RSAcat to a different server that will be RSA's own server, not shared with other SirsiDynix customers.
- o BCA Interactive Collection Review demo
    - RSA has been working on the Interactive Collection Review in BLUEcloud Analytics (BCA).
    - Members will be able to access this tool from a direct link on the RSA support site. Members will need an BCA login.

b. Cataloging Maintenance Center (*P. Thomas*) <mark>Time in recording: 00:19:21</mark>
- o On May 9th, the Online with the CMC webinar was "Getting Serious about Series." It can be viewed on the CMC's YouTube here.
- o Working on FY25 Online with the CMC webinar schedule. The webinars will be posted on L2.
- o Moodle course: Subject analysis – a CMC cataloging course from May 20th – June 30th. Registration here.
- o Moodle course: Cataloging Basics – a CMC cataloging course from July 8th – August 18th. Registration here.
- o Moodle course: Cataloging 3D objects, kits, and realia – a CMC cataloging course. Registration here.
- o Upcoming CMC events are on L2 or listed here.
- o The CMC started the RSA Backlog Project in October 2023, working on 1,671 records so far.
- o Pam is working with a committee to start the Illinois Cataloging Mentorship Program (iCAMP).

c. RAILS Cataloging Services (*R. Bierman for N. George*) <mark>Time in recording 00:23:14</mark>
- o RAILS will be offering a six-week training course on MARC through a Moodle-developed site in late summer (starting August 26th).
    - L2 Registration: https://librarylearning.org/event/2024-08-26/marc-21-standard-training-moodle-course
    - Registration period – 06/03/24 to 08/19/24.
- o In the fall, RAILS plans to offer training on specialized topics, either cataloging children's materials or cataloging video games.
- o In late winter, RAILS plans to offer an asynchronous Moodle course on "Classification Basics: Understanding Dewey Decimal Classification and WebDewey."

- o All training will be listed on L2. RAILS continues to develop new courses and revise the content of existing courses. Please reach out to Nincy George (nincy.george@railslibraries.org) if you have suggestions for cataloging courses.
- o Mentorship Program for Cataloging Professionals of Illinois
  New Name: Illinois Cataloging Mentorship Program (iCAMP)
  - RAILS is collaborating with IHLS to establish a mentoring program for cataloging professionals in Illinois.
  - A committee of 14 members from various Illinois libraries are involved in shaping this program.
  - iCAMP will be launched in September 2024. Updates on the program will be shared through RAILS/IHLS e-news and various RAILS listservs. Please stay tuned for further information.
- o World Language cataloging
  - In the last quarter, RAILS cataloged 339 World Language titles from various Illinois libraries, enhancing resource management and accessibility.
  - Libraries are welcome to submit unlimited items.
  - World Language Cataloging Services Program details can be found at https://railslibraries.org/catalogs/cataloging-services
- o World Language cataloging survey
  - RAILS surveyed Illinois libraries to evaluate the World Language cataloging service. The feedback was overwhelmingly positive, with high satisfaction reported. While many libraries appreciate the program, some are not yet prepared to use it. Most users submitted items for original cataloging, with fewer opting for copy cataloging.
  - The survey indicates strong demand for the service's expansion. RAILS appreciates RSA members' contributions to the survey.
  - Reach out to Nincy George if you have any questions regarding cataloging services from RAILS.

- d. RSA operations (*A. Deter*) Time in recording 00:28:33
  - o Operations manual
    - 8 or 9 volunteers on the Operations Manual Working Group have been meeting monthly for the last several months.
    - The Operations manual will be a one stop jumping off point for how to survive a day at an RSA library, aimed at front line staff.
    - The beta version of the manual will launch in early July 2024. The working group will review suggestions and revise the manual.
  - o Documentation index
    https://support.librariesofrsa.org/project/documentation-index/
    - A list of all documentation that RSA staff have written.
    - Includes policies, standards, procedures, cheat sheets, online forms, and links to RSA Youtube videos and parameters.
    - The index includes a "last updated date" for each document.
  - o Parameters Parties Plus

- The Parameters Parties Plus will be mandatory for RSA members.
- The RSA Operations Department will start by reaching out to RSA libraries in the Eastern region in July 2024. Then they will move to libraries in the Southern region.
- There will be 50 or so questions about circulation and other topics.
- RSA has found there is a gap between what members do in day-to-day practice and how WorkFlows is configured for them. For example, 18 libraries went fine-free without contacting RSA to reconfigure WorkFlows to accommodate this change for them.
- The Operations Department is currently researching to prepare for these meetings. Preparation takes approximately two hours to complete.
- The Operations Departments hope to be done with the Parameters Parties Plus sometime in late Fall 2024.

3. New email groups for cataloging staff (*E. Laughlin*) <mark>Time in recording 00:41:30</mark>
   - RSA recently created new email discussion groups for library staff.
   - These groups are the place for you to share information with other members, ask questions, propose solutions, and provide feedback, but these groups are not a replacement for emailing help@rsanfp.org.
   - RSA staff will monitor the conversation in the groups and chime in if necessary.
   - Sign up for email groups here or go to support.librariesofrsa.org → Get in touch → RSA email groups signup.
   - Groups especially helpful for cataloging staff:
     - Technical Services Staff (all of TS outside of cataloging in WorkFlows issues)
     - Cataloging (specifically for cataloging questions, discussion, and issues)
     - Cataloging Policies & Standards (works on new or existing policies and standards, as well as providing feedback for other operational documents)
   - All library staff will be signed up for these groups:
     - RSA Information (replaces the current RSA listserv)
     - Outages and Maintenance (used to announce RSA upgrades and issues -- planned or unplanned)
   - A list of all email groups is available here.
   - All of the groups have an archive for subscribers. To access the archives, go here and enter the email with which you are subscribed.
   - If you subscribe to a group and find it is unhelpful, unsubscribing is easy:
     - Click the 'Unsubscribe" link at the bottom of the email from the group.
     - Email help@rsanfp.org and provide your email address and the name(s) of the group(s) from which you want to be unsubscribed.

4. Progress since the last Database Committee meeting:
   a. RSA upgrade of brief records to full OCLC records (*L. Schemensky*) <mark>Time in recording 00:44:35</mark>
      - 1,098 = Number of brief records upgraded since the 02/27/2024 Database Committee meeting

- o RSA continues to work through a system-wide report of brief records with email addresses in their 592 fields, upgrading them to OCLC records. RSA works through the report oldest to newest based on the brief record creation date.
- o RSA is currently upgrading brief records entered in March 2023.
- o Remember to reply to RSA's email if you will not send the item. We will cancel the hold and delete the 592 field, so we do not contact you again about the item.

b. Cataloging Maintenance Center's work on the backlog (*L. Schemensky*) <mark>Time in recording 00:46:15</mark>
- o The CMC continues to upgrade braille, encoding level 8, and encoding level M records in the cataloging request backlog to full OCLC records.
  - 722 = Encoding level 8 requests processed since the 02/27/2024 Database meeting
  - 670 = Open encoding level 8 requests
  - Age of the oldest open encoding level 8 request = 01/29/2019
  - 100 = Encoding level M and braille requests processed since the 02/27/2024 Database meeting
  - 1,157 = Open encoding level M requests
  - Age of the oldest open encoding level M request = 04/26/2017

c. 2024 annual cataloging theme: Connecting with Catalogers (*E. Laughlin*) <mark>Time in recording 00:48:05</mark>
- o Rework of the Basic WorkFlows Cataloging Workshop and potentially the Bibload Workshop to encourage more members to participate.
  - o In-progress with the Basic WorkFlows Cataloging Workshop. Training for Item Group Editor will also begin later this year.
  - o Watch the listserv for more details in the coming months!
- o Launch of the RSA Technical Services Membership Group and email list after RSA becomes an Illinois Intergovernmental Instrumentality on July 1, 2024.
  - o The Technical Services email group, along with the Cataloging and Cataloging Policies & Standards email groups, were launched at this meeting.
  - o Attendees from the past couple Database meetings have already been subscribed to the Cataloging Policies & Standards email list.
- o Start of RSA Cataloging Chat to replace Database Committee meetings -- targeting three or four per year.
  - o The first Cataloging Chat is scheduled for Friday, September 27, 2024 from 10:00 am to 12:00 pm on Zoom. Registration is available here.
- o Official launch of cataloging site visits!
  - o Done -- these visits are up and running, going well!
  - o Remember you can request a visit here by choosing the cataloging option: https://form.jotform.com/RSAnfp/RSAsite-visit-request or go to support.librariesofrsa.org → Get in touch → Visit request.

- o RSA will also be reaching out to libraries we haven't heard from lately to see if they would be interested in a visit.
- o Since the February 27, 2024 Database meeting, the RSA cataloging team visited 9 libraries.

5. WorkFlows Cataloging;
   a. Library binding ISBNs on brief records (*R. Bierman*) ==Time in recording 00:52:14==
      - o Enter the ISBN for the paperback or hardcover version of the book into the 020 and title control number fields on the brief record. The paperback or hardcover ISBN is found inside the book on the title page verso and not necessarily the back cover.
      - o After you create the brief record, email help@rsanfp.org to ask RSA to add the library binding ISBN to the record. The library binding ISBN is usually found on the book's back cover.
      - o Adding the library binding ISBN helps other libraries identify this record as a match for their item, avoiding the creation of a duplicate brief record.
      - o Instructions how to handle library binding ISBNs on brief records are found in the Creating a Brief Record - a Guide.

   b. Recently created cataloging parameters (*R. Bierman*) ==Time in recording 00:56:11==
      - o There have been 10 new Home Locations added since the February 27, 2024 Database Committee Meeting. You can see the complete list of home location codes here.
      - o There has been 1 new Item Type added since the February Database Meeting. You can see the complete list of Item type codes here.
      - o There have been no new Item Category 1, Item Category 2, Item Category 3 codes created since the February Database Meeting.
      - o There have been 4 new Item Category 4 codes added since the February Database Meeting. You can see the complete list of Item Category 4 codes here.
      - o There has been 1 new Item Category 5 code added since the February Database Meeting. You can see the complete list of Item Category 5 codes here.
      - o If you would like to use any of these codes for your collection, please email help@rsanfp.org.

   c. Item categories 6-10 (*E. Roberts*) ==Time in recording 00:59:50==
      - o Item categories 6-10 were launched in WorkFlows with the upgrade to version 4.1.0.0.1367 in late March.
      - o Currently, RSA does not plan to use item cast 6-10. They may be used in the future for special projects.
      - o When you catalog a new item in WorkFlows, item cats 6-10 should automatically default to using undefined.
      - o Please contact help@rsanfp.org if you notice item cats 6-10 are blank when you are cataloging new items. RSA will also be monitoring newly cataloged items for blank item cats 6-10.

- o In early May RSA worked with SirsiDynix to batch edit existing items with blank item cats 6-10 to undefined.
- o No need to include item cats 6-10 in the 949 tag on an OCLC record loaded into WorkFlows. OCLC records loaded into WorkFlows will automatically use undefined for item cats 6-10.

d. Reminder re: pre-release items (*E. Roberts*) Time in recording 01:03:15
  - o A pre-release item can be cataloged in WorkFlows on a brief or OCLC record and start accumulating holds, but please do not check it out to a patron before the official release date.
  - o As soon as the pre-release item is cataloged, be sure to check it out to an internal technical services user or an on-order user until the release date. Please do not check out pre-release items to individual cataloger accounts.
  - o On the release date, the item can be discharged from the tech services or on-order user and then start filling holds and checking out.
  - o RSA will reach out if we learn your library is checking out pre-release items before their official release date.

e. Discard and last copies on records (*J. Choate*) Time in recording 01:04:40
  - o RSA recently learned that last copies on records can be removed from WorkFlows during the discard process unless one of the following conditions is true:
    - The item is in-transit.
    - The title is under serial control.
    - The title has an open order.
    - The item is on hold.
  - o Items that fail to discard due to one of the above conditions are shadowed in the RSAcat, preventing patrons from seeing them and placing holds.
  - o Please contact help@rsanfp.org if you are interested in a report of your library's items that fail to be discarded.

f. Erased fixed fields on WorkFlows records (*J. Choate*) Time in recording 01:08:00
  - o Please email help@rsanfp.org if you encounter records in WorkFlows where most of the fixed field values at the top of the record have been erased, appearing as pipes |
  - o In your email, mention erased fixed fields and the record's OCLC title control number, found in the 001 field on the bibliographic tab.
  - o RSA will re-import the record into WorkFlows, so the fixed fields correctly populate.
  - o This issue most likely stems from applying constant data / the 949 tag incorrectly in OCLC Record Manager.
  - o Fixed field values are important for searching and display in WorkFlows and the RSAcat.

g. Follow-up: Deletion of items with bills (*E. Laughlin*) Time in recording 01:11:25

- At the February 27, 2024 Database meeting, we discussed the inability to delete items with bills without having to first manually create the bill on the patron account and then discharge the item, so that WorkFlows thinks it is available to then delete or check out to discard.
- The items with this issue that were shared with RSA after the September Database meeting to investigate were all assigned the LOST-ASSUM current location.
- RSA learned from SirsiDynix that there is a long overdue report that can be run in WorkFlows that moves LOST-ASSUM items to the current location of DISCARD, so they can then be removed.
- A couple of significant problems with the long overdue report that prevents RSA from using it:
  - Problem #1: When the long overdue report creates a bill on the user record, it will not include the title or item ID on the bill tab of the user record. The title and item ID information is put on the extended information tab of the user record, which library staff will likely not know or remember to check.
  - Problem #2: When the long overdue report creates the bill on the user record, it uses the current date as the billing date, rather than keeping the original billing date. Because the newly created bill uses the current date, WorkFlows will see there is a new bill and notify the patron, but there will be no title or item ID on the billing notice, only a price. Patrons will likely be confused and upset why they are receiving a bill with no information about the item.
- Since the long overdue report is not a workable option for removing LOST-ASSUM items, please continue to:
  1. Create the bill manually on the user record.
  2. Discharge the item to remove it from LOST-ASSUM.
  3. Either delete it or check it out to your library's discard user.

h. Revised cataloging documentation (*R. Bierman*) <mark>Time in recording 01:15:34</mark>
- Cataloging At-A-Glance
  - Available here: https://support.librariesofrsa.org/project/cataloging-at-a-glance/
  - Updated with additional Basic WorkFlows Cataloging Workshops, this cheat sheet includes information about cataloging site visits, WorkFlows cataloger accounts, "how to" cataloging refreshers, CMC and RAILS cataloging services, and RSA cataloging events.
- Database Maintenance Reports
  - Available here: https://support.librariesofrsa.org/project/database-maintenance-reports/
  - This cheat sheet lists several reports the RSA cataloging department can run to help libraries with database maintenance projects. Please submit a report request if you are interested in any of these reports.

    i.   Upcoming Basic WorkFlows Cataloging Workshops (*E. Roberts*) <mark>Time in recording 01:17:05</mark>

- June 25, 26, 27 2024 from 9:30 am to 12:00 pm
  Registration: https://librarylearning.org/event/2024-06-25/rsa-online-basic-workflows-cataloging-workshop-3-days
- July 23, 24, 25 from 1:30 pm to 4:00 pm
  Registration: https://librarylearning.org/event/2024-07-23/rsa-online-basic-workflows-cataloging-workshop-3-days
- August 20, 21, 22 from 9:30 am to 12:00 pm
  Registration: https://librarylearning.org/event/2024-08-20/rsa-online-basic-workflows-cataloging-workshop-3-days
- Basic WorkFlows Cataloging Workshops are also listed on the Cataloging-At-a-Glance cheat sheet or check the L2 calendar.
- Additional Basic WorkFlows Cataloging Workshops will be scheduled in 2024, posted on L2, and announced on the RSA listserv.

6. OCLC Cataloging
   a. 758 field on OCLC records (*L. Schemensky*) <mark>Time in recording 01:18:15</mark>
   - The 758 field contains a unique identifier for a resource that is either the resource described in the record or a related resource.
   - In December 2023, OCLC began to add WorldCat Entities URIs (Uniform Resource Identifiers) for Persons, Places, and Events to records in the 100, 600, 647, 651, and 700 fields.
   - In January 2024, OCLC began adding WorldCat Entities URIs for Works to 758 fields in records to "establish a bridge between MARC data and linked data," according to OCLC.
   - The 758 field does not display in RSAcat unless a user clicks the Catalog Data button on the item details page.

   b. Update to OCLC Holdings Manager (*J. Choate*) <mark>Time in recording 01:21:41</mark>
   - OCLC Holdings Manager (OHM), the process used to batch update RSA libraries' holdings each month in OCLC, is being updated.
   - SWAN, another shared catalog system in Illinois and the creator of OHM, has been testing it for their membership's OCLC holding updates, and it is working well.
   - The underlying processing in OHM is much faster, which means our holding updates should be done faster.
   - RSA will continue with our May OHM update even though the processing will be delayed as SWAN continues to work out the kinks with the new OHM.

   c. Upcoming RSA Bibload Workshops (*E. Laughlin*) <mark>Time in recording 01:23:44</mark>
   - Bibload Workshops are scheduled in June, August, October, and December.

- o All Bibload Workshops are listed on the Cataloging At-A-Glance cheat sheet or check the L2 calendar. They will also be announced on the RSA listserv closer to the workshop dates.
- o Next Bibload Workshop:
    Thursday, June 27th 1:00 – 3:30 pm
    Registration is available here and closes June 20 at 5:00 pm.
- o Please read the workshop requirements posted on L2 and shared in the RSA listserv invitations carefully before registering.

d. Proposal to start using Homosaurus (*E. Laughlin*) <mark>Time in recording 01:25:00</mark>
- o Homosaurus is an international linked data vocabulary of Lesbian, Gay, Bisexual, Transgender, and Queer (LGBTQ+) terms. These terms can be used as subject and genre headings on bibliographic records.
- o Homosaurus is not intended to be used by itself but supplement Library of Congress Subject and Genre Headings, as well as other controlled vocabularies.
- o Homosaurus headings will increase access points on records and improve discovery of materials for the LGBTQ+ community in WorkFlows and RSAcat.
- o Library of Congress Subject Headings (LCSH) often do not reflect the terms used by patrons when they search for LBGTQ+ topics. Homosaurus is more specific than LCSH.
- o If this proposal is accepted by the Database Committee and approved by the RSA Board, RSA cataloging staff would begin assigning Homosaurus headings as we catalog in OCLC.
- o RSA would add Homosaurus headings on the official WorldCat record to allow other OCLC members to benefit from them when they use the record in their local databases.
- o RSA would add Homosaurus headings to OCLC records using the same care and caution we exercise when adding any controlled vocabulary term to records -- only when we are certain, based on our review of the heading's scope note in the Homosaurus vocabulary and the content of the item, that the heading is appropriate for that item.
- o Even if RSA does not start adding Homosaurus headings, RSA libraries will likely see an increase of these headings on OCLC records as this vocabulary is adopted by more libraries, and the records are then loaded into WorkFlows.
- o RSA already has OCLC records in WorkFlows with Homosaurus headings that were added by other OCLC members, then the records were loaded into WorkFlows. Homosaurus headings use the source code |2 homoit in the 650 and 655 fields on OCLC records.
- o Homosaurus headings are not visible on the results list or the item details screen in the RSAcat unless the patron clicks the Catalog Data view. Homosaurus terms are still searchable in the RSAcat.
- o If the Database Committee supports RSA using Homosaurus, this proposal will be presented to the RSA Board for approval in summer 2024.

- o If approved by the RSA Board:
  - ▪ This proposal will be posted on the RSA support site and announced on the RSA listserv.
  - ▪ Libraries will be encouraged to email help@rsanfp.org if they have an LGBTQ+ item they would like RSA to examine to see if Homosaurus subject and/or genre headings can be added to its OCLC record.
  - o RSA may eventually work with the vendor MARCIVE to add Homosaurus headings to existing records and update obsolete Homosaurus headings to the current preferred terms.
  - o A poll was conducted during this meeting. The majority of attendees were in favor of forwarding the Homosaurus proposal to the RSA Board for approval.

7. ALA Core Creative Ideas in Technical Services Interest Group recorded webinar (*L. Schemensky*) <mark>Time in recording 01:38:00</mark>
   - o As part of ALA Core Interest Group week during the first week of March 2024, there was a webinar for the Creative Ideas in Technical Services Interest Group that RSA libraries may find interesting.
   - o Presentations included:
     - • Applications of the QA Catalogue for Analyzing Library Data
     - • Practicing Self-care on the Job in Technical Services
     - • Homosaurus Usage in the OCLC Database: an Exploratory Analysis
   - o Access the free recording and slides here.

8. Let's Celebrate: (*J. Williams*) <mark>Time in recording 01:42:15</mark>
   a. New and upgrading RSA libraries
      - o ROWVA CUSD #208 Elementary School / (ROWVA-HS)
        - • About half of the collection is cataloged.
        - • Automation project is paused due to staffing.
        - • This library returned their IGA to remain an RSA member after July 1, 2024.
      - o Mason Memorial Public Library (MM_MASON-M)
        - • Currently an RSA Union List Library.
        - • Making good progress cataloging.
        - • Interested in becoming an automated RSA member, using WorkFlows for circulation and holds.
   b. Service anniversaries
      - o Erica Laughlin – 15 years

9. Transition to RSA Cataloging Chats (*E. Laughlin*) <mark>Time in recording 01:44:14</mark>
   - o Three times per year -- January, May, September -- up to 2 hours long on Zoom.
   - o RSA staff facilitates the meeting, which will be primarily information sharing.
   - o Discussion will mostly occur in the RSA email groups, particularly the Cataloging or Cataloging Policies & Standards groups.
   - o Cataloging Chat agendas, recordings, and slides will be available on the RSA support site.

- o *First* RSA Cataloging Chat:
  Friday, September 27, 2024 10:00 am – 12:00 pm. Register [here](#).

Notes written by:
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June 5, 2024

Notes finalized by:
Erica Laughlin, RSA Cataloging & Database Supervisor
June 13, 2024