

## Cataloging Department Report for 5 June 2025

### *Cataloging Backlog Progress*

In late April, the Cataloging Maintenance Center (CMC) finished working on the backlog of RSA cataloging requests submitted as far back as 2017 and as recently as 2020.

The backlog project began in October 2023 and consisted of:

- 4 braille books in need of upgraded or original OCLC records
- 3,318 pre-publication encoding level 8 records in need of upgrade to full bibliographic description in OCLC
- 1,358 minimal encoding level M records in need of upgrade to full bibliographic description in OCLC

A big thank you to the CMC staff for their excellent work over the past year and a half!

### *Brief Record Upgrades*

Since the April Board meeting, the RSA cataloging department has upgraded 408 brief records to OCLC records with full bibliographic description.

RSA is currently upgrading brief records entered into WorkFlows as far back as July 2023.

### *Cataloging Site Visits*

The RSA cataloging department conducted seven cataloging site visits since the April Board meeting:

- Erin visited Clayton Public Library District, Filger Public Library, La Harpe Carnegie Public Library District, and Morrison & Mary Wiley Library.
- Jennifer visited Martin Township Public Library and dropped in at Towanda District Library.
- Lisa visited Alpha Park Public Library District.

Combined, these visits reached 13 library staff for a total of 12 hours.

The RSA cataloging department is looking forward to routine site visits starting on July 1<sup>st</sup>. The first group of libraries that the department will visit have not yet received cataloging site visits.

### *Cataloging Training*

Two Basic WorkFlows Cataloging Workshops were taught on Zoom since the April Board meeting:

- Jennifer taught this workshop for seven participants on April 29<sup>th</sup>.
- Lisa taught the workshop for two participants on May 27<sup>th</sup>.

Erica taught the Bibload Workshop in-person at Dunlap Public Library District on April 25<sup>th</sup> for one participant.

WorkFlows Item Group Editor training began in April and was conducted in-person at four libraries:

- Erin trained Morrison & Mary Wiley Library.
- Jennifer trained Hudson Area Public Library District.
- Lisa trained Chillicothe Public Library District and Heyworth Public Library District.

Over the past two months, the cataloging department participated in webinars on various topics, including cataloging government documents, critical cataloging theory, authority records, accessibility metadata, recording series information, and an update on the Resource Description & Access (RDA) cataloging rules. Erica attended the SirsiDynix COSUGI conference in Milwaukee on April 14<sup>th</sup> -16<sup>th</sup>.

### ***Other Cataloging Projects***

- The Bibliographic Database Policy will be presented to the RSA Board for approval at its June meeting. This policy requires RSA member libraries to adhere to the [RSA Bibliographic Database Standards](#). Due to governance changes over the years, there has been uncertainty about who has the authority to revise the Bibliographic Database Standards. This policy allows RSA staff to revise the Standards as needed without need to have the Board approve each revision.
- The “Colorful Cataloging” networking session hosted by the RSA cataloging department at RSA Day on April 10<sup>th</sup> was a success! Thirty-one participated.
- An RSA Cataloging Chat was held on Zoom on May 29<sup>th</sup>. Ten participated.
- Erin, Jennifer, and Lisa continued cross training on cataloging support topics. Topics since the April Board meeting include the correction of items cataloged on the wrong records, loading records into WorkFlows for the McLean County Museum of History, and resolving issues with |z call numbers.
- Lisa submitted a proposal for a panel session at the 2025 Illinois Library Association conference. The session is titled “Peek Behind the Technical Services Curtain: Cataloging for Non-catalogers.” The proposal was accepted. In addition to Lisa, the panel will consist of cataloging staff from Champaign Public Library, CARLI, and the CMC.
- Several cataloging documents were recently revised and are now available on the RSA support site:
  - [Matching an OCLC Record to Your Book Cheat Sheet](#) – Includes additional examples and removes mention of submitting RSA cataloging requests.
  - [Reporting Cataloging Issues to RSA Procedure](#) – Includes an additional option for copy-level holds to be placed on books in need of ISBN additions.
  - [Creating a Brief Record Guide](#) – Includes updated instructions for creating a brief record for a library bound book. Also includes a screenshot example of a cake pan brief record.
  - [RSA Bibload Procedure](#) – Includes information about the OCLC EXCLUDE item category 6 code.
  - [Cataloging At-A-Glance Cheat Sheet](#) – Includes information about Item Group Editor training.

## Operations Department Report for 5 June 2025

### *Item Retention Policy*

For various reasons, we decided to delay bringing a draft Item retention policy to the board. Firstly, there are four other policies on the agenda this month, a couple of which are more urgent. Secondly, after deciding to include Paid Bills in the policy, we discovered that there were millions of paid bills in the system going back as long as we have been using Symphony. Seeking permission to remove the oldest of these is on the agenda for June 6, and so I thought I would wait to see the remaining extent of this issue once those have been removed.

### *Sharing and Holds Policy*

As a reminder, the team reorganized and updated the holds documentation we provide on the support site. There are currently 3 different board level policies on holds and it seemed to us to make sense to combine these into one document which will make it easier for staff at member libraries to find and understand important information on holds. All procedural information has been removed so that the policy should stand only as a statement of intent. It has been sent to the Circulation forum and shown to the DAC and their feedback has been incorporated.

### *Lost Materials Policy*

Following on from the Damaged Materials Policy the board adopted on April 4 which sought to separate out the procedure from the policy intent, the team has prepared a draft Lost Materials Policy. This has also been shown to the forum and DAC. An accompanying procedure is available from the support site here: <https://support.librariesofrsa.org/wp-content/uploads/2025/05/Lost-Materials-from-Other-Member-Libraries-Procedure-2025-05-16.pdf>.

### *Parameters Parties*

As of May 29, 145 Parameters Parties have been completed out of 156. Eight parties are in progress and the last three are scheduled. Parties are considered complete once all the tickets raised have been closed. All but two of the parties for public libraries are now completed. Operations Team staff have continued holding parties with non-public members. 679 cases have been raised from the 153 parties held. 667 of these are closed at the time of writing. It is still expected that the parties will be completed by the end of June.

Prior to the Parameters parties the Circ map had 1276 lines and as of 5/29/2025 there are 861 lines remaining, so that's 411 lines removed. The Circ map is also much easier to navigate as consistent naming conventions have been applied.

### *Discard Users Project*

Discard Users are all automated and every library has one and a report is running in Workflows to discard them. If a Library should accidentally create one RSA staff will be alerted but ultimately the libraries should contact RSA if they need another Discard user, whether that's for a weeding project

or because they are changing the User ID as the Report to clear the Discard User will need to be changed and that can only be done by the RSA.

### ***No-Transit Users***

Now that the Discard users Project is complete, we have started working on No-Transit Users. As with Discard Users we decided that one should be created for each library whether they had been using one previously or not. We could then remove No-Transit from library's User Profile dropdowns thus preventing new ones being created in error. These newly created No-Transit users have dummy barcodes and as RSA staff visit libraries these dummy barcodes will be replaced with real User IDs. Libraries are not required to use their No-Transit user but information on how to use them can be found here: <https://support.librariesofrsa.org/wp-content/uploads/2025/03/Using-a-NO-TRANSIT-Account-Cheat-Sheet-2025-01-13.pdf>.

### ***Routine Visits***

Both the Cataloging and Operations Teams will be starting a new round of routine visits in July. Kendal set Erica and I the goal of ensuring that each member library is visited within an 18-month period. Members of each team will visit half the members over those 18 months and then they will switch. This means each library will be visited in person every 18 months and will have a Cataloging and Operations team visit every 3 years. Libraries have been organized into visit groups based broadly on the length of time since their last in-person visit.

### ***Holds Limits***

At time of writing, we have updated half of the User Profiles with the new Holds Limits approved by the board. It is anticipated that we will have this complete by the board meeting.

### ***Individual Accounts***

In preparation for rolling out both Individual Circulation accounts and BC Central we have worked on updating both the Help Desk database and our lists of cataloging, BCA, and circ accounts (these currently only in Quincy. This project is now complete, and we are in a good place to ensure that we can maintain up to date information about these accounts. It is essential that member libraries inform us when their staff leave so that we can quickly deactivate their accounts and secure our systems. RSA staff's last step of the process is emailing the library Director to report that all accounts have been removed/deactivated or created.