

## Montana Shared Catalog Fall 2024 Membership Meeting

October 24, 2024, 10 am - 12 pm

Held online via Zoom

**Roll Call:** Aaniiih Nakoda College Library, Big Timber Carnegie Public, Billings Public Library, Billings School District, Boulder Community Library, Bozeman Public Library, Bridger Public Library, Clinton School, Conrad Public Library, Darby Community Public Library, Drummond School & Community Library, Fallon County Library, Glacier County Library, Great Falls Public Library, Harlowton Public Library, Hearst Free Library, Hellgate School District #4, Laurel Public Library, Lincoln County Library, Livingston-Park County Public, Logan Health Medical Library, Madison Valley Public Library, Meagher County City Library, Medicine Spring Library, Miles City Public Library, Mineral County Public, Missoula County School District, Missoula International School, Missoula Public Library, Montana Department of Transportation Library, Montana Historical Society, Montana State Genealogical, North Jefferson County District Library – Clancy, North Valley Public Library, Plains Public Library, Red Lodge Carnegie Library, Roosevelt County Library, State Law Library, Stillwater County Library, Stone Child College Library, Three Forks Library, Valier Public Library, Wibaux Public Library

### MSC & MSL Staff Introductions:

- Amy Marchwick, MSC Lead System Administrator (Belgrade)
- Melody Karle, MSC System Administrator (Cutbank)
- Mel Carroll, MSC System Administrator (Lolo)
- Keiley McGregor, MSC Trainer (Belgrade)
- Laura Tretter, MSC System Administrator (Helena) (not present)

### Spring 2024 Minutes Approval – ACTION

Nancy Schmidt (Laurel) moved to approve minutes as written; Deb Westrom (HGEL) 2nd; A minor update was made to fix name spelling and Minutes were approved with no objection.

### MSC Updates - Amy Marchwick

- **Gov Delivery:** MSC has completely migrated from MSC listserv to GovDelivery newsletter. Make sure you and all your staff are subscribed. It is not limited to one person per library, please have all employees enroll/subscribe. Also archived in [Knowledge Base](#) (KB), so you can view past topics. Link to subscribe: [https://public.govdelivery.com/accounts/MTLIBRARY/subscriber/new?topic\\_id=MTLIBRARY\\_54](https://public.govdelivery.com/accounts/MTLIBRARY/subscriber/new?topic_id=MTLIBRARY_54)
- **MSL/MSL - Agency Workplan:** Rebekah has been making some great updates to this page. [https://msl.mt.gov/about/publications/work\\_plan/](https://msl.mt.gov/about/publications/work_plan/) You can choose projects (Shared Catalog is under “Collection Management”) to view activities and objective for LSTA projects that are updated monthly.
- **Toole County Library:** Went live this year after several years of retro-cataloging. Delighted to have them join us and live in the system! They re-cataloged over 16,000 items during the past few years!

- **BCM2 (Blue Cloud Mobile 2) App:** New version of the mobile app. What we have now is the original version. Last fall it went down due to some contract issues between SIRSI and 3rd party vendor and came back up. In the meantime, SIRSI was working on their in-house version. We are on the waiting list right now to get moved to this version. There will be no need to uninstall/reinstall the app for those who have it, it will just act as an “app update.” Because it is no longer third party, it will be managed through SIRSI, so there will no longer be a charge for separate templates by library. More configuration options will be available, one new feature would be biometrics as an optional login feature (Face ID). It will still be called the same name in the app store. The logo will change to the MSC’s version of the State Library’s new logo. MSC will let members know when it’s ready to go live.
- **Library Configuration Assessment:** Were perhaps overly optimistic about how long it would take to get this going, but internal process is in the final stages and it’s a priority to “launch”/begin reaching out to individual libraries. This would be looking at settings and reports, then getting in touch and recommending changes to match best practices and also ask if there are any changes libraries want to make. This is a big system and sometimes there are things you might not remember that were set up a while ago.
- **Assumed Lost/PLO Consolidation:** In the process of doing an Assumed Lost and Processed Long Overdue (PLO) consolidation (mostly this applies to publics/those who are doing on a weekly or monthly basis) Schools are doing this on a schedule that works for their calendar.

PLO breaks the link between patron and item and puts a note on the patron’s account. MSC is merging over 175 of those processes on the backend into about 10 processes. This won’t affect notices for the most part, the only thing that will change is freeing up some processing space on the report server (these take several hours right now because each process stops and starts--now they will be merged into some consolidated processes) to avoid potential indexing running long/reports backing up. This has not been a problem, typically, but should be avoided. You may be hearing from MSC if your processes were setup long before the consortia best practices.

- Is it still mandatory to designate EMAIL in one of the fields for patron email notices? Yes. If you want instructions on how to set USER CAT4 to email, open a [ticket](#).
- Do not put the capital “E” in extended info for email opt in.
- There is a NONOTICE option in User Cat4, too. It is not turned on automatically, so if you want it, open a [ticket](#).
- **Ticket System is the best way to get in touch with MSC staff.**
  - Feel free to open a test ticket if you want to see if your Okta/ServiceNow account is working.
  - Is there a way to navigate between KB and ticket website without being “trapped?” Amy will check. The software is administered by the State IT department.
- **Enterprise Boolean Search (Mel Carroll):** The vendor is currently working on building a new online patron catalog (Blue Cloud Discovery). That will take a while, so the “Advanced Search” is being updated/repared as a holdover. They are expecting Blue

Cloud Discovery to be consortia ready when it is released, though they still have not started testing. First pilot should be in the next few months and more in 2025.

- If you click on “Advanced Search” now, you will see a more useful Boolean Advanced Search with drop-down fields and several operators. In order to make it work, you will have to choose a “Sort by” option. MSC thinks they will set it to default “Title” but have not decided yet.
- There will be a KB article with information about the Boolean Search in the next Gov Delivery update--watch for it!
- **Cataloging (Content Management Committee-CMC):** If you are interested attending their online public meetings, please do.
  - **French Language Subject Headings:** you may have noticed that we have many more French language subjecting headings since the National Library of Canada added their catalog to WorldCat a few years ago. These headings are being stripped out of new bib loads currently, so you will be getting instructions in the next Gov Delivery update to confirm your SmartPort properties are updated.
  - **Call Number Analytics:** Fairly large update, but more information is coming. In 2025, V. and names of months will no longer “force” the |Z into call numbers. Catalogers will be putting in |Z manually. There will be lots of guidance. It will not be for periodicals (DEWEYPER).
    - Example: if your author’s name is “MAY” it may force something you don’t want.
    - Will reduce patron confusion in holds/reduce hold errors.
    - Evanovich could use V. without it forcing the separate record--can make your labels consistent
    - Current pilot with Bridgnet Sharing group, separating bibliographic records for each volume. Right now, you want to stay consistent with your sharing group. CMC will have more recommendations in 2025--not there, yet.
  - **Unique Identifier/URI (Melody Karle):** There have been some tickets about the “link” unique identifiers. They come from OCLC and a few other agencies. It’s a feature of linked data. They are not in Enterprise, not seen by patron, they are helpful on the backend to help identify. It will take a little while for authority control to merge them to where all authors have a unique identifier link. It will be a little messy until then, but please don’t delete them. SIRSI is working on some options to change where this displays in the future.
  - **Cataloging Procedures (Melody Karle):** Laura has been working on splitting out the cataloging articles in the Knowledge Base. Please always use the KB, rather than keeping a print copy (or check the articles often). There is no longer one place to print the entire cataloging procedures, instead they are in bite-sized pieces. Please put in a ticket if you can’t find what you need.
- **Service Now Demo (Keiley):** From the State Library page, click Services to Libraries then Library Services Support ([https://msl.mt.gov/libraries/library\\_services\\_support](https://msl.mt.gov/libraries/library_services_support)) Bookmark that page!  
Choose “Citizen Login”

Add additional contacts/staff members in the CC area, if necessary

Choose your support team (Aspen, MHP, MSC, or others)

Categories are used for ticket statistics, but if you enter something not quite right, it's not a big deal.

Ability to add attachments--screenshots are usually very helpful!

Once you submit the ticket you will see the ticket was created and the date and time.

You can add information and "post" it to the ticket afterward, too.

You can export the ticket if you want to, but you can view all your open and closed tickets from "My Requests" (this is also where you see saved drafts)

You will get an email with a link to the ticket. You can respond to the email instead of logging back in.

### Knowledge Bases:

MSC is constantly working with State IT to try to make this a better view.

If you are not already logged in and you go to the KB page, you will be prompted to login. You might get to a slightly different "Browse" view if you click around quite a bit (without categories, but still has a search bar).

Use the [Library Services Support](#) page to get to the view with categories.

### Categories View:

The screenshot displays the 'Categories View' of a Knowledge Base. On the left is a sidebar with a list of categories and their respective counts in blue circles:

- Acquisitions: 2
- Cataloging: 54
- Circulation: 27
- Down System: 1
- Installation & Settings: 12
- Inventory: 1
- Mobile Apps: 7
- MSC Information: 21
- Online Patron Catalog: 10
- Reports & Statistics: 15

The main content area is divided into two sections:

- Top Rated Articles:** Lists five articles, each with a five-star rating:
  - Managing Holds and the Holds Shelf in MobileStaff
  - Orientation for School Libraries at the Beginning of the School Year
  - Formatting Reports in WorkFlows
  - 'Specified Path Not Found' Error in WorkFlows
  - New Staff Landing Page
- Most Viewed Articles:** Lists five articles with their view counts:
  - Updating WorkFlows: 162 Views
  - New Staff Landing Page: 141 Views
  - GovDelivery Newsletter Archive: 63 Views
  - Problem Discards: 54 Views
  - Copy Cataloging: 47 Views

### Browse View (no categories):

## BROWSE KNOWLEDGE BASE

HOME / MSL - MONTANA SHARED CATALOG

Knowledge Base: MSL - Montana Shared Catalog

150 results

### Renewing Checkouts in WorkFlows

About This article covers setting up and using the Renew User and Renew Item wizards to renew checkouts. To learn about renewing a user's account privilege, see [Renewing Patron Privilege in WorkFlows](#). Renewing Checkouts by User The Renew User wizard is great when you're helping a patron who doesn't have the item with her, or she has multiple ite...

Circulation | Updated 5/21/2024

### Cost Share Formula in the Montana Shared Catalog

The Montana Shared Catalog cost share formula distributes costs to participating libraries according to these percentages: Based on title (30%), circulation (10%) and patron (30%) counts that come directly from the system. The remaining 30% is divided equally among libraries. The following breaks are included: Title record break - libraries with...

MSC Information | Updated 9/26/2024

### Editing Bibliographic Records: Edition Statement (250 tag)

MSC member libraries are encouraged to enhance records in the catalog, as well as those that have just been imported. Remember that anything added to the bib record should reflect the whole title, and not just a specific library copy. Anything that is specific to your copy can be added at the item record level. Edition Statement MARC tag 250 con...

Cataloging | Updated 7/9/2024

### How Do I Take a Screenshot?

Sometimes it really helps us if you can take a screenshot of the problem you are experiencing when you open a ticket. We found a YouTube video that will help you learn how to do that. This video demonstrates on Windows 10 but most of these methods should work on current versions of Windows. Stratvert, K. (2019, March 19). How to take a screensho...

MSC Information | Updated 6/3/2024

### SEARCH

 

### POPULAR ARTICLES

MOM-POL-Employee Travel, Lodging Rates, Mileage Reimbursement, & Meal Allowance: 7345 views

EEO, Nondiscrimination, and Harassment Prevention Policy 1510 views

Filing your Montana Individual Income Tax Return 1495 views

Individual Filing Requirements 1299 views

Montana Corporate Income Tax 1233 views

- **Public Comment:**
  - Where do these get posted? To State Library YouTube Channel
  - Where are we on eResource Central? Still working with SIRSI for final parts of new products-- eResource Central, Community Engagement, and BLUEcloud Visibility.
- **Meeting Adjourned 11:25**