

Montana Shared Catalog Spring 2025 Membership Meeting

Tuesday, May 6: 1 pm – 4 pm Online Only via Zoom

Roll Call: Big Timber Carnegie Public Library, Billings Public Library, Billings School District, Boulder Community Library, Bozeman Public Library, Chouteau County Library, Clinton School, Conrad Public Library, Drummond School Community Library, Glacier County Library, Glendive Public Library, Great Falls Public Library, Hearst Free Library (Anaconda), Hellgate Elementary School, Joliet Public Library, Laurel Public Library, Lewis & Clark Library, Lincoln County Library, Madison Valley Public Library, Manhattan Community School Library, Meagher County City Library, Blackfeet Community College Medicine Spring Library, Mineral County Public Library, Missoula County Public Schools, Missoula Public Library, Montana Department of Transportation Library, Montana State Genealogical Society Library, Montana Historical Society Research Library, North Jefferson County District Library, North Lake County Public Library District, North Valley Public Library, Petroleum County School-Community Library, Plains Public Library District, Power Public School Library, Red Lodge Carnegie Library, Rosebud County Library, Sheridan County Library, Sidney-Richland County Library, Stillwater County Library, Stone Child College Library, Thompson Falls Public Library, Three Forks Community Library, Valier Public Library, Whitefish Community Library, Wibaux Public Library

Appoint Minute Taker

Becky Dupre, MCPS

MSC & MSL Staff Introductions:

- Amy Marchwick, MSC Lead System Administrator (Belgrade)
- Mel Carroll, MSC System Administrator (Lolo)
- Melody Karle, MSC System Administrator (Cutbank)
- Keiley McGregor, MSC Trainer (Belgrade)
- Laura Tretter, MSC System Administrator (Helena)

Fall 2024 Minutes Approval – ACTION

- Deb Westrom (Hellgate District) made a motion to approve the fall minutes, Jennifer Ball (Stillwater) seconded the motion; the minutes were approved by the membership without discussion/correction.

MSC Updates: MSC Contract

- Last year we made changes to the bylaws to remove mention of Executive Board. Several things like that are mentioned in the membership contract as well; it was last updated in 2017. Sean Anderson and Savanah will be working on drafting a single MSC group contract for all the things you can join as a member. This should simplify and include sections for each service that need detailed for what your library is using.

- The MSC may want to revisit the bylaws again after updating the contract to ensure items that may have been in the contract but were a better fit for bylaws. Estimate is to have that ready for the fall member meeting.
- Question on who receives and signs for schools: Current contracts go to school library director or librarian and superintendent or Board Chair or principal, depending on how the school joined.

MSC Updates: Item Type field is being renamed CIRC TYPE

- The “Item Type” field is being renamed to “CIRC TYPE” to better reflect its function—controlling how items circulate (e.g., 7DAYNH = 7-day loan, no holds). This change aligns the field with its function and will help with cataloging by making circulation rules more transparent. Most of the transition work will be handled by MSC. Libraries ready to switch should submit a ticket to initiate communication and mapping. All libraries will eventually move to these standardized circulation types, so please submit a ticket if you're ready or have a planned transition date.
- Everyone will be moving to these standardized Circulation Types, so please submit a ticket if you're ready now, or have a planned transition date.

MSC Updates: Series Linking

- This is working in Enterprise now so it will “ignore” the volume number and show all titles in the series.

MSC Updates: Update to Enterprise Missing Cover Images

- The default “no cover image” graphic in Enterprise is being updated to better match the item format (e.g., DVDs will display a DVD icon based on the FORMAT field in the MARC record). This affects only items without Syndetics cover art. If an image seems incorrect, check the MARC record for accurate formatting.
- Test profile link to view: https://mtsc.ent.sirsi.net/client/en_US/MTSCTESTRED

MSC Updates: Content Management Committee (CMC) Update

- CMC will move to a regular quarterly meeting schedule, with shorter 1-hour meetings to encourage participation. Meetings will be held on the first Wednesday of the quarter (e.g., June 4, Dec. 3).
 - June meeting will include cataloging guidelines for special items and kits.
- Discussed system match points at March meeting (specific MARC tags used to detect existing bib records). While generally effective, an increase in inadvertent overlays—especially for series and manga—has prompted updates to SmartPort match points. Changes will be implemented in May, with a GovDelivery notice to follow.

MSC Updates: Quick Reminders on Gov Delivery

All regular updates are shared via the MSC Updates GovDelivery newsletter. At least one staff member per library must be subscribed, but more are encouraged, since it's not role specific. An archive of past editions is available via the link at the bottom of each newsletter. Sign up!

Examples of Recent Updates Shared in Gov Delivery:

Three Types of System Users:

To make it more obvious, all system users were batch updated to User Cat1 of SYSTEM

1. **Library Logins** - Used to log into WorkFlows
2. **Library Accounts** - One per library that matches your library's policy in WF
3. **Library Process Users** - Used for Missing, Repair, Display, Discard, etc.
 - **Only Library Process Users** should be used for checkouts or holds.
 - MSC will update configuration to prevent checkouts/holds by the other two user types to prevent errors.
 - If you are currently using a non-Process User account for checkouts or holds, **please submit a ticket** so MSC can help set it up correctly.

Schools End of Year: In past years, an end-of-year form was used, but this year schools should submit a **ticket** instead. Most requests require follow-up communication, so please use the ticket system if you need EOY dates or grade level rollups.

SirsiDynix Products: Unlimited Web Services Connectors & SIP License; BCA Private Suite Add-On – ACTION

This is an action item, but it also ties into the budget and cost share agenda item, too. A memo on the Aspen page explains these products. Both are back-end products recommended by the MSC team.

- BCA Private Suite would move our BCA to a separate server area that would increase speeds, since we would not be competing with other libraries. This would increase performance and give us more access on the backend configuration - user creation, password updates. Annual cost that would stay stable and be added to invoice moving forward.
- Unlimited Web Services/SIP is also a back-end item, upgraded interface protocol to allow 3rd party vendors to talk to our system. Vendors often prefer Web Services; OverDrive has already requested the switch, and other vendors may follow. We will need to move at some point, SIP is probably not going away, but Web Services is an improvement that offers increased functionality and security.
 - There was discussion of the one-time connection fees for different products. Overdrive would be covered because it is used by so many. Members wonder how the initial setup connection fees will work (pool, single library pays, would others be required to switch from SIP, etc.) and are interested in follow up on connecting libraries for potential pools, etc.
 - MSC would handle Overdrive transfer. For other vendors, contact MSC before reaching out directly to the vendor so MSC can help set up any "pools", etc. As an aside, please always reach out to MSC before entering vendor contracts involving system integration.

- Other than Overdrive, most connections are used by groups of 3-6 libraries.
- Discussion of how the State Library will cover part of the proposed products, also. Can't say what the cost would be for individual connections instead of unlimited, or of waiting for a future year, but costs rarely go down.
 - Some were hoping to wait as every percentage increase is added dollars on tight budgets and it adds up.
 - Are large school districts like Billings and Missoula impacted more heavily with percentage increases (because of their size--similar to medium-large publics) for products that schools might not use. Hard for schools to raise more funds.
 - Would this be a permanent increase? State Library wants to keep the MSC cost increases to 4% next year if no additional purchases are made.
- Question of how many libraries are using many connections (120 connections daily are in use, but not all are expected to change to SIP). Is there a large library who can talk about the benefits?
 - MSC is seeing vendors who prefer Web Services or tell you they can connect with SIP but not all the functionality works. An example given was Patron Point by Billings Public
- Crystal Buchanan made a motion to revisit the purchase of both items next fiscal year if it doesn't have to happen this year. There was no second.
- Denise Ard made a motion to get the two new products and do a 6% increase this year with no more than a 4% in the future. There was a question about including future year language in the vote for this year's budget. The motion was amended to get the two new products and do a 6% increase this year. Seconded by Jacque Scott. **Amended to get the two new products and accept a one-time 6% increase this year to get the two new products. Seconded by Elizabeth Jonkel. The motion to accept a one-time 6% increase to get the new products passed the membership vote.**
- Will OCLC increase this year, also? Amy was not sure if that had been calculated, yet.
- Doomsday question--are there products we could remove from our Sirsi contract if budgets are slashed? Our past contract with Sirsi precluded us from reducing the invoice amount by dropping products, but Amy is checking the current contract and believes we can't turn off certain products, but that there would be some flexibility with others. Contract goes a few more years (2027) and then we will renegotiate or RFI.

Budget & Cost Share – ACTION

The above motion covers passing the budget, so no action needed for this item.

Records Privatization –

- Process changed in 2017, can set up new process with Sirsi if we agree on length of time before scheduled anonymization.
- MSC follows MCA and will continue to do so.

- Users who have opted-in to checkout history would not be affected by this process.
- Tabled--Will explore more and revisit at fall meeting.

Call Number Analytics

[Handout from Aspen](#), [updated KB article](#),

Three changes starting this month (May 2025):

1. WF will no longer “force” a |Z in call numbers when you type V. or other text combos like month in year in DEWEY classification scheme. DEWEYPER (periodicals only) will still force |Z.
 2. The space between the V. and number will be removed in batch. (e.g. |ZV. 4 will become |ZV.4) This will improve labeling and consistency. There will not be batch changes of DVDs.
 3. Catalogers will be expected to use separate bib records for series to improve holds issues and create consistency.
- In most cases MSC will batch move the books.
 - If you’re separating something, you need |Z. If no |Z, you are the “blank space” in the hold list. Everyone needs to add something to make sure patrons have descriptive options.
 - MSC staff recommend checking TV series out as a whole, instead of by disc. Must use DISC or DISCS instead of VOLUME for DVD sets. Avoid “&” symbol--DISC 1-2, not DISC 1&2. Batch changes can be done if you are consistently using something else.
 - Example of something that circulates in two parts:
 - When Calls the Heart is a good example: If it is season 1 discs 1-3 and there is season 1 discs 4-6 do we list it that way? Yes, correct, if you split that into two parts to circulate, the first would have |ZDISCS 1-3 and the second would have |ZDISCS 4-6
 - If you have been doing it consistently a different way, you can put in a ticket to make a batch change!
 - Want to help? Weed travel guides, so they don’t get transferred to individual records!

What is a call number analytic?

- A call number analytic is the bit that comes after |Z in a call number.
 - You may hear |Z referred to as “bar Z” or “pipe Z.”
- The system “analyzes” what comes after the |Z to know which part of a series or multi-part work you own. This is useful for sorting and allowing users to place holds (when used consistently).

The screenshot shows a library catalog interface. At the top, there's a section titled "Place Hold(s)". Below it, there's a table with columns "Title" and "Select item or leave blank for all others". The first row shows the title "The decline and fall of the Roman Empire" with a dropdown menu open, displaying options: "V. 1", "V. 2", "V. 40, V.I", "V. 40-41", "V. 41", "V.1", "V.2", and "V.I 40". Below the table, there's a section titled "Mineral County" with a list of items: "Whitefish Comm", "The decline and fall of the Roman Empire", and "The decline and fall of the Roman Empire". The list is numbered 1 through 7. The item "The decline and fall of the Roman Empire" is highlighted in blue.

Three changes starting this month (May 2025)

1. WorkFlows will no longer "force" a |Z into a call number when you type V. or other text combinations like month and year.
 - a. This change applies only to the DEWEY classification scheme. Catalogers will need to add the |Z manually when necessary.
 - b. The DEWEYPER class scheme (for periodicals only) will still force the |Z.
2. The space between the V. and number (e.g., |ZV. 4) will be removed in batch so that it will read as |ZV.4.
 - a. This will improve labeling issues and create consistency.
 - b. Catalogers will be expected to enter the analytic without a space between V. and #.
 - c. DVD call number analytics will NOT be changed in batch.
3. Catalogers will be expected to use separate bibliographic records for series.
 - a. This will improve holds issues and create consistency.

Public Comment

Lots of thank yous and appreciation to our great MSC system admins!

Adjourned at 4:00 p.m.