MSC CMC Meeting Minutes
3/4/2026
Minutes taker: Anders Johnson

CMC Members Present: Aaron LaFromboise, Carly Delsigne, Sydnie Tallman, Courtney Lujan, Kat Wilson, Anders Johnson, Angela Claver, Treva Higgins

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

Guests Present: Katie Burkhalter, Victoria Contreraz, Cindy Thomas, Hilary Woodard, Katy Campbell

I.   Review of minutes from December meeting
II.   Library Announcements
    a. Laura: Although Paullette (Missoula Public Library) is not present, she wanted to mention to the group that she will be doing a cataloger-in residence session for the duration of MLA.
III. OCLC Streamline Holdings Sync - Project Update
    a. Laura: The MSC staff have initiated a second streamline holdings sync:
        i.   To recap, this is the process where the MSC staff send records that MSC member libraries have in Workflows and compare this to holdings that appear in OCLC's WorldCat. OCLC performs additions or deletions to make sure records are synced between the two systems. Keeping records synced between Workflows and OCLC ensures that interlibrary loan requests and researchers outside the MSC have an accurate picture of your library's holdings.
        ii.   MSC staff sent files for processing on Feb 13, will hear back from OCLC soon.
        iii. For this second sync update, MSC staff have made a lot of good improvements on the record pull that MSC sent OCLC. Amy (Marchwick) is really awesome at this work; Amy created some nice code to help with this task. MSC staff realized after the first streamline holdings sync done last year that they needed to do a little more work with the records that are sent to OCLC.
    b. Laura: Like the last update, there are two collections of records that are sent to OCLC for this process:
        i.   One collection is based on the OCLC number in the 035 field in bib records; Records are matched based on this one field, and this facilitates faster processing. Records that are unresolved are put into a staging file.
        ii.   The other collection is the full matching record collection. These are records that were created in Workflows. OCLC then tries to match the

full record from Workflows with another in OCLC, and if there is no matching record, they will add the record to WorldCat so long as it is complete and valid; if not complete or valid, it is then added to a staging file.

    iii. Staging records: MSC manually looks through the records in the staging file, and fixes these. For these records, OCLC sets the library code that appears in the 040 so they all say MTSTC (The MSC code) rather than code of the individual library. This helps Laura add or delete records in staging since the holding code for all the records is for the MSC, and it helps OCLC more easily remove them from staging.

    iv. This holding sync process will be done twice a year. There is a bit of manual work required to update staging records.

    v. To-Do
1. Laura is going to ask if SirsiDynix can remove 035s from bib records that they add when they do pulls, so they don't pile up.
2. Laura doesn't know the number of records in staging off the top of her head but will make a note to see how many were put into staging after this sync is complete.
3. Laura plans to write a member KB on this process, although not this round; Laura hopes to get a member KB out there by the next round.

c. Laura: Overall, this is a productive process, especially considering that it is "free," at least in the sense that the MSC doesn't pay OCLC any extra to perform this work.

IV. SirsiDynix Bibliographic Analysis

a. Laura: This is another tool the MSC staff can use as part of our contract with SirsiDynix. This bibliographic analysis can be performed annually.

b. Laura: The analysis helps to provide some indicator of the quality of the records in Workflows.

    i. The Analysis provides count reports and list reports, e.g., it can count what subject headings are being used by the MSC, from which list, name headings, relator codes, language codes; It helps to give an overview of everything that is being used.

    ii. Then, MSC staff can use these reports to do clean up.

    iii. There are various triggers indicating the need for cleanup, for example, all caps in a title; bib records with no title; miscellaneous problems like multiple titles or two subfield "|a" in a single 245; Listing odd fields or obsolete MARC tags; Subject fields that have a dash dash instead of a subfield delimiter.

    iv. These reports as a cataloger are helpful; most of this information can be gathered through BLUEcloud Analytics too, though SirsiDynix provides this as part of our subscription, and they do it slightly differently.

c. Laura: To Laura's knowledge, this is the first time MSC has requested this and gotten the files from SirsiDynix.
    i. Amy: SirsiDynix has been working on making these reports more accessible; There were issues in the past where it wasn't able to be sent through the state email, so it hasn't been used before, to Amy's knowledge.
d. Angela: Will we be "ratted out" for bad cataloging?
    i. Laura everyone is doing great, you learn by making mistakes. This is just a way to give us a nice list of things that can be improved. It is a nice tool to see where improvements can be made, definitely not about pointing fingers.
e. Laura: This bibliographic analysis has given MSC staff a list of records using GMD (general material designation) subfield H of 245 field:
    i. This is an obsolete subfield, part of AACR2. When RDA was implemented in 2013 use of that subfield became obsolete. In 2016 the CMC gave recommendation to stop using GMD. Best practice is to not use this subfield.
    ii. In Workflows, the Additional Info column was set to display MARC 338 info when searching through records to help identify material / format, rather than through the GMD in the 245.
    iii. Laura showed list of all that different GMD text variations for large print to illustrate how the usage of this subfield has led to a lot if inconsistency. On the one hand, it may not matter functionally speaking, outside of keyword searching, but it makes MSC records look inconsistent.
    iv. Laura: Other things besides just the title field can convey that information: 33x Fields and format in Enterprise; series statements.
        1. Courtney: The GMD can be useful for looking for kits.
        2. Other comments in chat: GMD is useful for indicating large print or distinguishing between DVD and Blu-ray.
        3. Laura: Series statement and 33x fields should show this too, but not for DVD vs Blu-ray.
    v. Further questions / discussion about GMDs:
        1. Laura: Is just showing the CMC group what came up in the SirsiDynix bibliographic report.
        2. Anders: Is there a KB article that provides information on best practices relating to this subfield and how to alternatively convey the information in a manner that is RDA compliant?
        3. Amy: A while ago in the bibliographic standards KB there was a chart comparing AACR2 vs RDA that confirmed to not use GMD; there wasn't a great place to put this, however and a AACR2 vs RDA comparison chart doesn't seem useful anymore.

4. Laura: Having a KB could be a good place to make this explicit; There isn't an article that addresses this anymore.
5. Laura: We can carry this topic over for the next meeting to discuss. Perhaps members can look though Enterprise to consider different approaches.
6. Amy: We are not recommending GMDs, only some libraries are adding it; Lots of bibs don't have GMD at all because it is not an RDA standard; inconsistency is the biggest stumbling block.
7. Laura: The GMD will not be used in OCLC records, for the most part, unless they are old AACR2 records.
8. Amy: Alternatives are the 33x fields, and the 007. Maybe MSC staff can test pulling from the 007 instead of 338 for display in the Additional Info column; The 007 can be used to distinguish between regular and large print as well as between Blu rays and DVDs.
9. Carly: In general, we are just looking for guidance and standardization; It can be hard to train staff by digging through records if the bib records, they are looking at are not correct.

vi. Larua: We will keep looking at this GMD issue; Let's keep talking about this see what kind of guidance we can come up with. It has been revealed that we need to improve how this is done; the CMC can weigh in on this to get good info out there to members.

V. Library of things
   a. Laura: Angela, Paulette, Courtney and Anders have helped with developing some guidance on library of things.
   b. Laura: Some work has been done already, various sub-categories were added in the Knowledge Base, and an article on cataloging cake pans has been added. Most of these library of things KB articles will be introductory in nature.
   c. (Looking at cake pan KB article): The article provides attachment rules:
      i. When attaching, the most important things to look for are shape and size, not so much manufacturer or date. If the record describes a heart and you have a clover, don't attach to that record.
      ii. To be done: Still need to add a screen shot.
      iii. The article provides a bib record example.
      iv. Link to cake pan KB: https://montana.servicenowservices.com/citizen?id=kb_article_view&sys_kb_id=fe70f1e8934bfe1833bab7986cba10a6
   d. More LOT related articles to be added such as a general library of things article and articles on the create title wizard and modify title wizard.

VI. Item Cat 1 KB Article:
   a. Item Cat 1designates material format.
   b. Laura shared a link to KB article on Item Cat 1 : https://montana.servicenowservices.com/citizen?sys_kb_id=bdc9fed9871fb

25043200f28cebb3557&id=kb_article_view&sysparm_rank=1&sysparm_tsqueryId=961d95548723721443200f28cebb3525

      c. MSC has recently updated the KB to list additional pre-loaded audio recordings, audio players, and read-a-longs.

      d. Laura: Would like it if CMC members could look at this list of Item Category 1 categories and see if there are any emerging formats that could be added to the Recommended Use column.

VII.   Bib Record Standards:

      a. Laura is contemplating some changes to [the Bib Record standards KB](#) and asked the group for input.

      b. Specifically, the KB distinguished between permanent full, permanent local, and temporary records (temporary records being used mainly for ILL).

      c. Laura isn't sure how useful the distinction between permanent full and permanent local records is, and it may be adding a decision layer that isn't really needed. Also, the permanent local record guidance is to just add a 245 and 338, which doesn't help patrons much if they can only search by a title.

      d. Laura suggested that there could be just one standard for both permanent full and permanent local records.

      e. Several in the chat agreed with this move to have just one MARC encoding standard for permanent records; there were no objections.

VIII.   Closing comments:

      a. Laura: will save series discussion for next time.

      b. Laura: Montana Library Association:

           i. Paullette will be at MLA as a cataloger in room 201 for the duration as a cataloger in residence. She would love people to come and join her or help her.

          ii. Mel Carroll is going to do a session titled The Item Life Cycle in the MSC on Thursday 4/16 from 3:30-5:00 in the Britain room.

        iii. Laura plugged attending the tech services interest group meeting on Friday 4/17 from 400-5:00 pm in the Lewis & Clark room.

        iv. All the MSC staff will be at MLA.