MSC CMC Meeting Minutes
09/02/2026
Minutes taker: Anders Johnson

CMC Members present: Angela Claver, Carly Delsigne, Elizabeth Fellerer, Anders Johnson, Courtney Lujan, Jodie Moore, Paulette Parpart, Kat Wilson

MSC staff present: Amy Marchwick, Mel Carrol, Keiley McGregor, Laura Tretter, Lora Poser-Brown

Guests present: Katy Campbell, Shannon Washburn, Katie Burkhalter, Victoria Contreraz

I. Announcements
II. Review of minutes from 6/3 meeting
    a. **Angela Claver**: Angela's library has been making more use of series linking
III. Bibliographic Maintenance Tasks
    a. **Laura Tretter:** In June/July we finished quarter 2 authority updates. There was an issue with scheduling of authority work overnight that caused the service to get interrupted. We worked this out though and ran an extra update in July to fix the June service. This month (September) is the quarter 3 authority process.
    b. Annual flip heading process was completed in August. This supplements work in authority service, updating older forms of names, correcting punctuation, and more minor things.
        i. Last year was the first year the flip heading process was done, there were over 173,000 changes. This year there were over 46,000 changes.
        ii. Laura showed examples of punctuation fixes and name normalization that were improved through this process
        iii. Laura still wants to write a KB article about this process
IV. Partner Standardization Committee
    a. Laura T: Abbi in Polson helped get this group going to standardize use of item record policies across all Partner Sharing Group libraries. This committee created a survey to ask which policies partner libraries are using and why. Mel then prepared and presented three options to them for the subcommittee to review.
    b. **Amy M.:** If anybody wants to streamline the fields on their items the MSC staff would like to help with this
V. Circ Type Progress Report
    a. **Laura T:** Circ type is something that the MSC talked about years ago. This used to be called functional item types in Workflows and was changed to circ types. This field is meant to communicate how things circulate (e.g., 7 day, 28 day, etc.), not list item formats (book, cd/dvd, etc.).
    b. Some libraries were moved to circ type in Workflows pre-covid. Last year the MSC administrators set a deadline of November 2027 to move all libraries to circ type.
    c. Currently 81 libraries are using circ type in this way (listing how things circulate), with 89 more libraries to go, depending on how you count. So we are close to

50% implementation. Right now MSC is prioritizing partner libraries because of their subcommittee's desire to standardize

d. The circ-type change seems to be working well, and MSC staff haven't heard any negative feedback from libraries that have already transitioned.

VI. Access points for e-readers and instructional kits

a. **Laura T**: Shared KB article, "Cataloging E-Readers in Workflows": https://montana.servicenowservices.com/citizen?id=kb_article_view&sysparm_article=KB0020357

b. **Laura T:** Cataloging pre-loaded e-readers is not as common these days but Laura did recently get a question from a school about cataloging this type of item. Laura reworked an old KB article on this topic, and it helped clarify something in her mind in terms of KB documentation for things like literacy kits. In the case of e-readers with preloaded titles, the question is how to provide title- or author-level access to these items which have many distinct items within them.

c. **Laura T:** Went back and forth between using 505 (content notes) and 700 fields (added entry); felt that 505 didn't work as well as Laura thinks that 700 is cleaner in terms of indexing.

d. **Anders:** Did you notice a difference between the two from a retrieval standpoint, that is, from a user perspective?

    i. Laura T: Yes, the 700 fields worked better

e. **Angela:** The 700s also seem easier to read / more legible

f. **Laura T:** I want to make a KB article on literacy kits for members to review for the December meeting

g. **Jodie Moore:** Jodie liked this approach and stated that this approach seems applicable more broadly as well, e.g. backpacks that can be checked out which contain multiple books on a subject. Jodie wondered however if "literacy kits" is the best name since this approach seems applicable more broadly to "things that contain things", e.g., tablets that have games on them, etc.

h. **Jodie Moore:** Jodie noted that it could be useful to have something like a flowchart so that catalogers know where to go to find documentation on cataloging specific types of items. Jodie also suggested MSC could start sharing more cataloging tips with member libraries or feature cataloging tips in the MSC emails that go out.

i. **Amy M.:** Amy likes the idea of cataloging tips and flowchart that can get people in the right vicinity for specific guidance they are seeking.

j. **Jodie M:** Some people just want something printed out as well (referring to a flow chart idea)

k. **Mel:** Mel liked the idea of cataloging tips for a newsletter, though it can be hard to come up with these tips sometimes. Mel invited the CMC group to suggest neat tips and tricks that could be shared out more broadly.

l. **Jodie:** Who gets the newsletter is the question: is it the person doing the cataloging, the director, etc. It could be good in the newsletter to just go back to basics as well in terms of tips, they don't need to be super advanced.

m. **Paulette:** Paulette mentioned her goal for MLA next year is a pre-conference cataloging workshop. Paulette is writing a 12 page very basic "this is what you

need to know" script that people can printed out for a person's desk. Is there an email list for people who want to be mentored?

n. **Laura T:** We do have some mentors in MSC; there is a place to direct people to. Some of these ideas are things Lora P.B. may touch on later in this meeting.
o. **Paulette:** If anyone wants to see what Paulette has done, she has a rough draft she would like to share with the CMC for feedback. Paulette helps a lot of libraries, but she mentioned that she won't be here forever and wants to get something in place to help people. Paulette said she is open to help if anyone in the CMC wants to help her with this.

VII. Enterprise Updates
  a. **Mel:** Some updates to Enterprise will be rolling out in the next couple weeks
    i. Will be adding summary block to all of the detailed displays to standardize things across the catalog
    ii. The facets on the left side will be standardized; not big changes but just re-ordering and structuring some of it
  b. **Anders:** Will libraries still be able to hide facets that aren't applicable to their library?
  c. **Mel:** Yes

VIII. Trainer Updates
  a. **Lora P.B.:** As the new MSC trainer Lora has been combing through different areas of MSC programs like Enterprise and Workflows to better understand how they work. As part of this process Lora has put together several documents to help people with beginner level stuff.
  b. Enterprise Flyer for Patrons
    i. Lora put together a flyer to be shared with patrons and board members on how to use Enterprise
    ii. Lora gave a preview of the flyer to the group, which included tips on how to do a search, how to use facets/delimiters, what a subject search means, etc.
    iii. Lora indicated she will be sharing the flyer with other libraries as a word document so that libraries can edit it themselves and share it with their patrons.
  c. Enterprise Slideshow for Patrons
    i. **Lora:** Also created a slideshow training that is specifically meant for patrons
    ii. Lora will share this with CMC members to provide comment. Lora requested that CMC members use the comment tool to provide suggestions
    iii. Lora mentioned that she could make a different slideshow for staff later, but that this one is for patrons
    iv. Once the template is finished, the intention is that libraries can edit the slideshow to make it their own
    v. Lora then gave the CMC a preview of the slideshow, which covers topics such as logging in to the catalog, searching the catalog, how to make lists, how to use ADA mode, how to access the Kids catalog.

1. Lora noted that items must be marked with Juvenile, Middle, etc. in Item Cat 2 to show up in the Kids catalog

vi. Lora specifically asked for feedback from the CMC on what is missing for patron knowledge and recommendations on things to add or modify

d. Word Document – Back to Basics for MSC librarians
   i. This document will cover things like how you add a book to the catalog; it is intended for people new to cataloging or the MSC.
   ii. The document will cover very basic things at the beginning like terminology, record trees in Workflows, searching, and general terminology to be familiar with.
   iii. Lora said she would be sharing the documents with CMC members for feedback and asked that when members provide feedback, they indicate which document they are providing feedback on, what page numbers, etc.
   iv. **Amy M.:** An email will be sent out later today or tomorrow asking for comments; we want feedback on the patron-facing ones especially.

IX. Last Comments
   a. **Jodie:** Suggested that for Paulette's document, there could be a separate document for MSC users specifically since not everyone at the conference will be in the MSC
   b. **Paulette:** The workshop will not be focused on Enterprise but the fields in a MARC record, defining them, etc.