NC Cardinal
Cataloging Committee Minutes
March 13, 2015

I. Review Circulation Modifiers
   • We are moving to a shorter circulation modifier list. Options will be presented to catalogers on April 23, 2015.
   • Conduct a quick environment scan of strategy used by other consortia.
   • Consult Equinox on ramifications/pros and cons of both strategies.

   a. Option 1: Circ/Hold policies controlled by Circulation Modifier. Use the new expanded, consortium-wide circulation mod list as the primary ID for reports, hold, circulation policies; Shelving location becomes descriptive and secondary field. Shelving location is NOT used for circulation and hold policies, just the circulation Modifier. (current strategy with revised, shorter circulation Modifier list.)

      Pros: Less circulation policies and hold policies. 2. A detailed circ modifier list
      Cons: Would not necessarily simplify the cataloging screens or workflow

   b. Option 2: Circ/Hold policies controlled by Shelving Location. State Library reporting would be based upon circ modifier. Use a shortened circulation mod list based upon the SL’s annual statistics reports with a locally-controlled shelving location. The shelving location is rolled into the circulation and hold policies. Shelving locations will be revised and common shelving locations would be instituted at the consortium level instead of at the branch and system level. Specialty shelving locations will still be under local system control. BENEFIT: Library catalogers see all circulation modifiers but only their OWN shelving locations.

      Pros: Library catalogers see all circulation modifiers but only their OWN shelving locations.
      Cons: Could expand the number of circulation and hold policies

      Questions:

      1. Any performance issues either way?
      2. Integration issues?

II. Certification program
   a. Every person who edits, adds, merges, overlays or deletes bibliographic records must be certified.
   b. All current NC Cardinal Catalogers must certify within 6 months of implementation of the certification program or lose cataloging privileges. New hires must certify within 6 months of their hire date.
c. Certification requires passing an online test. Training will be provided several times a year. You can opt out of training by passing the test.

d. Only certified catalogers will receive individual cataloging accounts. Only certified catalogers may request Cataloging Technician and Cataloger user accounts. Branch and system-wide cataloging accounts will be disabled.

e. Incoming member library catalogers must complete certification during their migration process.

Training Content:
One level of training;

Permissions
• Cataloging Tech (Circ Super) - Item maintenance: add, edit and delete item records; manage copy buckets; manage parts
• Cataloger - same
• Cataloging supervisor - same