CAMM Technical Group

November 15, 2023

SCRAP's Recommendation

Books

For any of the following differences, use an existing record:

- **020/024/028:** Different standard numbers
- **250:** Edition statement related to binding (e.g. First paperback edition)
- **264‡b:** Difference in publisher if in the same publishing house/group
- **264‡c:** Difference in publication date of 1 year or less
- **300‡a:** Difference in pagination of 10 pages or less
- **300‡c:** Difference in size of 2 cm or less **NOTE: If the only difference between two manifestations is a height that is larger than 2 cm, a cataloger can choose to use an existing record at their own discretion.**

Reminders

- 490/8XX fields – Local practices summary
- OCLC settings for diacritics – OCLC Connexion Export Settings
- 008 Tag/ Audience Field – Target Audience

Rose, Buds, Thorns, Questions Activity

Snack & Self-Reflection (10 minutes):

- Participants review what they wrote while completing their individual Rose, Buds, Thorns, and Questions worksheet.

Rose, Buds, Thorns, Questions Activity

Group Discussion (20-25 minutes)

- Participants report to their assigned group.

- Groups elect a notetaker to record feedback on the group Roses, Buds, Thorns, and Questions worksheet.

- Groups elect a spokesperson to report this feedback at the end of the group discussion.

- Group members discuss their Roses, Buds, Thorns, and Questions. Feedback is split into the relevant quadrant. Repeated feedback gets a "+" written next to it each time it is repeated.

- The group discussion may be extended by five minutes if needed.

Rose, Buds, Thorns, Questions Activity

Debrief (20 minutes)

- Each spokesperson gets two to three minutes to summarize group feedback.

- Debra and Rachel will record the feedback placing a "+" next to things that are shared multiple times.

Roses Notes - Serials

- Easy to navigate from the check-in record to the item record

Buds Notes - serials

- Would like to designate a specific item template to be used in the serial holding record instead of it being select automatically

- Less white space – so much scrolling when editing

- Would be better if it automatically clicked enter after a barcode is scanned at check in

Thorns Notes - Serials

- When you check in an issue and it shows price, if you don't have it set to prompt for a barcode, then it doesn't fill in the price

- When you use a new pub patter and you ask it to predict issues, it doesn't allow you to delete the issues you don't want (which client does)

- In Leap, you want to delete multiple predicted issues, you have to delete them one at a time

- When you put in the number of issues to predict (1) - it predicts 3! (Maybe this is a bug?)

Rose Notes - Cataloging

- Creating and importing bib records is easy
- Easy to transfer holds in bulk +
- Easier to limit by shelf location when searching
- Find tool has a lot of filters
- When creating an item record, autofill is helpful
- When deduplicating, it makes it easy to understand which record is being kept
- Searching functionality is helpful for ISBN/identifying duplicates form Find Tool
- Bigger font
- Local items tab
- Delimiter definitions
- Can work in Leap on any computers
- Not flipping as much for serials
- Can customize search columns in Find Tool

Rose Notes- Cataloging

- More friendly for new staff
- Interface has logical flow (tabs, links, etc)
- MARC tab has explanations of delimiters
- Easily undelete record sets
- Shared interface with other departments

Bud Notes - Cataloging

- Need Ad hoc bulk change in record set and Find Tool +
- Record set access is not intuitive
- In the item record, hyperlink color is not clear
- Ability to edit multiple fields in Bib record at the same time
- Ability to make multiple item records with one click
- A link from the bib record to the purchase order
- Adding macros functionality
- Spell check feature like Connexion (squiggle like Word)
- Dedupe button, so you can dedupe w/o saving a record +
- If it was more like a word processor when it comes to the MARC editor
- Double click on delimiter would open pop-up
- Make deleting easier – multiselect records
- Like the separate tabs in the client for accessing different record types
- Wish we could keep all record types in the recent records
- Ability to edit straight in the record w/o pop-ups
- Spell check
- Side by side or tile windows

Thorns - Cataloging

- Cannot have multiple side-by-side windows open in Leap ++
- If you want to edit a tag, you can't change it from a 500 to a 505 field; you have to delete and reenter it +
- Having to use multiple tabs, browser windows to view side-by-side
- Issues with Chrome causing problems in Leap
- Searching – if you close record, have to redo search and apply limits
- Having pop-up screen to edit tags is cumbersome; would prefer to make changes directly on main screen ++
- It's hard to find deleted items and record sets – don't appear in search results
- Find Tool is too small – Can it be maximized? Cannot view all results +
- Dialog boxes are different when saving?
- Delimiter font color is hard to read
- Importing records is awkward/unclear -
- When you close window without closing records, records remain locked for other staff
- Bulk changing item records from a record set, the item records disappear – open a ticket with Kim? (need to save record set before doing bulk change)
- Too much white space (visually pleasing, but spreads everything out)
- Label printing – continuous labels

Thorns - Cataloging

- Cataloging in Leap/editing MARC takes longer than the client (see all other feedback)

- Too many dropdowns – dropdowns for indicators

- Dropdowns – need a lot of scrolling

- Generally, every action needs a click/multiple clicks (see other feedback) ++

- Can't have/ view multiple records open at a time

- Can't view all items in record set

- In client, you can see all item on order templates. In Leap, you only see a few options.

- Cannot ad hoc bulk change off of POs

- Cannot save default find tool limits like in client for each type of search

- Too many tabs to sift through b/w bibs and items

- Searching in the Find Tool in Leap is more confusing
    - Can't make the find tool bigger

- Can't load all results at once in find tool (no karate chop)

- Label manager is difficult to use – fonts were printing too small. Less efficient than client when you want to make multiple labels. Can't change font size in the label. No label setting access in Leap – still need to do in the client and then go back in leap to check/verify it works (toggle back and forth constantly)

- Save and refresh in item record to see change in action – for POs, items records, etc

- When you add new MARC field, it will put the tag at the bottom if there are already multiple fields of that number

- Can't change tag number (from 500 to 505)

- Client can be used with no mouse – don't like Leap because it is a web product S(tab/shortkeys) (12 use the ShortKeys program in the Client)

- hortkeys don't' work in drop-down on web)

- When you're working with a group of record sets to delete, when you delete one, you can't get back to your search

Other

- Mismatch between column and issue holds
- Best practices/recommendations for workflows to allow for uniformity
  - Recommended reports/tasks
  - Z39.50 - don't bring in delimiters. Should we all use connexion? Here are the benefits of using one over the other
  - When should you use Leap to merge, when should you use client?

Questions notes

- Why not update?
- What are the benefits of moving to Leap?
- Is iii working with Catalogers through working groups?
- Is there a way to save multiple default types?

Questions?

- Email help@ccslib.org