



SWAN Cataloging Working Group

10/09/2025 Meeting Minutes

Attendance:

Cataloging Libraries Present: Israa Abbas (OLS), Joy Anhalt (TPS), Rebecca Bartlett (LGS), Victoria Bitters (ESS), Marie Costuna (CSD), Jenny Cuevas (ADD), Stephanie DeYoung (BLD), Diana DiPierro (LPS), Dani Erway (MED), Bronwen Heneghan (TCD), Julie Johnston (GED), Susana Leyva (DGS), Ann Marie Lindsey (GED), Eden Morris (ADD), Mike Novy (WCD), Emily Parker (LGS), Kira Riddle (DGS), Paul Rubio (ADD), Jessica Rutka (TPS), Melissa Siddiqui (OBS), Julie Tegtmeier (SCD), Nicolette Vaillancourt (NUD), Colleen White (OPS), Jenny Yasecko (OLS).

SWAN Staff: Cynthia Romanowski (Chair), Lucas McKeever, Diane Nickolaou, Angela Puckett, Samantha Dietel.

Meeting summary for Cataloging Working (10/09/2025)

Quick recap

Cynthia Romanowski led the meeting by providing the group with an update on the 1.3 million record Backstage load and the loading of the accompanying Authority Records. The team also discussed Cataloging Libraries' ability to perform Aspen grouping and Cynthia performed a brief demonstration. Additionally, a discussion was held regarding Lucas McKeever's series consistency documentation to receive Cataloging Libraries' feedback on the document that provides standardization for creating and updating series entries. Furthermore, Lucas highlighted the new 89Xs tags and their usage and notified the libraries of titles that were coming off the Weeklies list. Finally, Cynthia announced that she would like to start a Foreign Language Catalogers list and highlighted the update to the Local Subject Heading page.

Next steps

- Cataloging Library members send Cynthia an email if willing to help others catalog in a particular foreign language.
- SWAN staff to locate documentation on the Circulate check box.
- Cataloging Libraries to think about how series volume numbers should be
 - 9, 14
 - 9 & 14
 - 1-2
 - 1 & 2
 - 1, 2, 5
 - 1 & 2 & 5
 - 1-2, 5

Welcome

Cynthia welcomed newcomers to the meeting as well as West Chicago for becoming the 22nd Cataloging Library.

Backstage update

Cynthia updated the Cataloging Libraries on the 1.3 million records uploaded and indexed over the Labor Day weekend. She explained that these records came back with over 818,000 authority records that were new or updated records. These records will be fully indexed in December when the Authority Rebuilds will be performed while libraries are closed.

Aspen Grouping Capability

Cynthia clarified that grouping records in Aspen were optional, not mandatory, due to complexities and potential ungrouping difficulties, especially with classical music and e-resources. One main difficulty with ungrouping was that the record could not be regrouped if ungrouped accidentally. She emphasized examining bibliographic records in WorkFlows before grouping records in Aspen. Cataloging details (titles, language codes, subtitles) tend to be the areas that prevent grouping. Support was offered for staff who need assistance with grouping, highlighting the importance of accurate cataloging to facilitate automatic grouping. Cynthia performed a brief demonstration of grouping in Aspen.

Series Consistency Documentation

Lucas led a discussion on the Series Consistency Documentation that he sent out to the Cataloging Libraries prior to the meeting for them to review and provide feedback at the meeting. This documentation identified guidelines for series to help establish consistent practices when working with unauthorized headings and volume ranges. A discussion was held

on establishing consistent practices for series records, including handling unauthorized series headings (using 490s/8XX fields with authorized or unofficial headings), and the creation of series pages in Aspen. The consensus was to allow the 490 with a second indicator of 0 was acceptable for unauthorized nonfiction titles, but not have it show in Aspen to align with proper cataloging standards. This will prevent complications in series page generation and make any potential future clean-up of the series easier when/if the headings ever become authorized.

The next discussion was held around series released with two or more volumes in one issue. It focused on how series entries displayed in Aspen. The correct cataloging approach is to create separate 800 entries for each part, but the group decided that one 800 entry with the volumes on the same line would be better. The Cataloging Libraries were instructed to decide how they would like the volume numbers to look and let us know.

890s Tags

Lucas highlighted the usage of the new 89X local series tags, which can be used for collections like Library of Things. These tags were protected to prevent data loss if records were overlaid. They also facilitate shared records, local customization, and easier linking from external websites.

Weeklies

Lucas provided his findings on the audit he, Angela, and Diane, performed on the Weeklies' titles and highlighted the titles that were no longer going to be considered a weekly. He used the cut off for anything that had 500 items or less as well as latest issues to determine if SWAN should treat them as a weekly.

Foreign Language Catalogers

Cynthia asked if people would be willing to share their foreign language knowledge with other cataloging library members to help catalog bibliographic records in a non-English language. Members were encouraged to email Cynthia with their contact information and the foreign language they are comfortable and willing to share their expertise with other catalogers. She emphasized that this was meant to help another cataloger and not catalog the item for them. Additionally, she reminded Cataloging Libraries to make sure that they use the local practice of a 650 0 for any foreign language materials and not the 690, even though it does not always authorized.

Documentation Update

Cynthia notified the changes made to the Awards portion for the Local Headings page so that people who wanted to input Caldecott or Newbery awards have a standardized way of inputting them. She stated that SWAN would not be keeping track of these, but many libraries were inputting them, so consistency needed to be set.

Closing Notes

Cynthia announced Eisenhower Public Library will be hosting the April 9th, 2026, in-person meeting for Cataloging Working Group.

Open Discussion

A question arose about the Circulate button in the Item Record and what it did. Fellow members discussed what they used that button for and when they checked/unchecked it. SWAN to send out documentation out for it.

Follow-up: Lucas found (and emailed) information on SirsiDynix's website in regard to the Circulate checkbox:

"Your library's circulation Map policies govern how any item is to be circulated based on the library, the Item Type of the item being circulated, the user profile of the user who wants the item, and the circulation rule. For a particular item, however, you can determine that the system-generated rule can be overridden. This is done using the Circulate field.

If the Circulate field is available on an item that typically could not be charged, or if the Circulate field is unavailable on an item that typically could be charged, an override must be entered before the copy can be circulated.

For example, usually any public library user can check out a FICTION item, but American Psycho was identified by the local school principal as sensitive material that should never circulate to young students. The circulate field check box on each copy is cleared. An adult user wants to check out the title, so an override is entered, and the adult can check out the fiction item. However, when a 12-year-old student tries to circulate the copy, and the staff member is prompted for the override, she must determine whether the student's parents have filed written permission before entering the override."

SWAN recommends this be used for one-off situations where you do not want to create a unique item type for one or two items that are temporarily not circulating for whatever reason. For collections, it is more redundant to have that checked if your circ rules for that collection's item type are not for circulation, but it is a safeguard you are welcome to employ.

If you decide to do this, remember that you will need to update that field in addition to the item type to move the item from non-circulating to circulating. This field can be changed in the Global Item Modification wizard so make sure this step is not forgotten for items that are relocated to circulation near the end of their lifespan at the library, like older edition of the World Books encyclopedia sets.

Next Meeting on Zoom: Thursday, January 8, 2026 at 9:30 AM