Minutes of the Cataloguing and Authorities Users' Group
Date: Monday, September 10, 2012, 10:00am – 11:30 am
Location: Gerstein, Alice Moulton Room

Attendees: James Mason (Music), Alastair Boyd (Robarts), Joan Links (Media Commons), Mary Reynolds (Regis), Marlene van Ballegooie (Robarts), P.J. Carefoot (Fisher), Irene Wu (ROM), Elisa Sze (Inforum), Diana Liang (UT Scarborough), Juliya Borie (Robarts), Hana Kim (EAL), Lisa Andrews-Attwater (Rotman), Carmen Socknat (VIC), Michael Bramah (SMC), Humayun Rashid (Law), Fabiano Rocha (Robarts), Lana Soglasnova (Robarts), Kate MacDonald (Trin), Helen Ge (Knox), Sergio Quibus (OISE)

Action items for CAUG members:

- Each library is to send Marlene the name of their staff person who deals with serials.

    1. **Minutes of the last meeting**: approved.
    2. **Business arising from the last meeting**: none.

    3. **Report from the Metadata Librarian (Marlene van Ballegooie)**

Authority file
- Currently working with Bilal to merge authority file with the catalogue search to enable "see" references. Subject authorities will be the test case, and if it works, will move onto Name authorities. Example: Heart-attack see myocardial infarction.

Nightly scripts improvement

- Working with Bilal in ITS to improve the updates process. Currently new records are updated and added to catalogue every evening but deletions happen only on Friday; aiming to have deletions happen nightly as well; will be updating this information to Summon.

RDA Records and Endeca:

- Working with Alastair & Bilal to improve display of RDA records in Endeca; currently using a program to modify Robarts batch uploads to convert RDA records to AACR2 so they display normally to public; this is a stop-gap.

    Biggest change will be removal of GMD from 245, and also the additional 3xx fields for media and carrier types; for now for consistency, records will not display with the GMD in the title field in Endeca but will make use of the facets.

    Q: Music libraries and others rely on GMD so what would happen? Marlene: data would remain in MARC record, but would not display in the OPAC in the title. Alastair pointed out that an increasing proportion of records that are in RDA do not have a GMD in title field. Marlene also mentioned that there will be additional icons in the record to show what media type it is.

    Q: What about realia objects? Depends, send specific examples to see how Bilal might be able to display it in Endeca.

Language codes update:

- Marlene has been working with Lana to programmatically correct outdated language codes in records for Bosnian, Croatian and Serbian writing. They are recognized as being separate languages but had been treated as one language, Serbo-Croatian. There are now five codes instead of just two, and having this accuracy is important given the broader political implications of this issue.

Endeca performance: Bilal is looking at ways to improve the speed of search.

Q: About summon searches - When looking for articles sometimes results are returned and they're not really there, why is this? Marlene advised them to send suggestions into eproblems@utoronto.ca to Richard Hydal so he can look into the issue.

Review of policies for Sirsi

- Endeca displays based on Sirsi information. Currently looking into how Sirsi information is displayed by Endeca in order to improve the accuracy of information provided to patrons. Example 1: Current location lost UTL in Sirsi just shows up in Endeca as 0 holdings. Example 2: Order records – in Endeca the item may not show up as on order, it shows as 0 holdings.

Marlene suggested if anyone else noticed issues like these, now is the time to submit improvements because Bilal has time to deal with them.
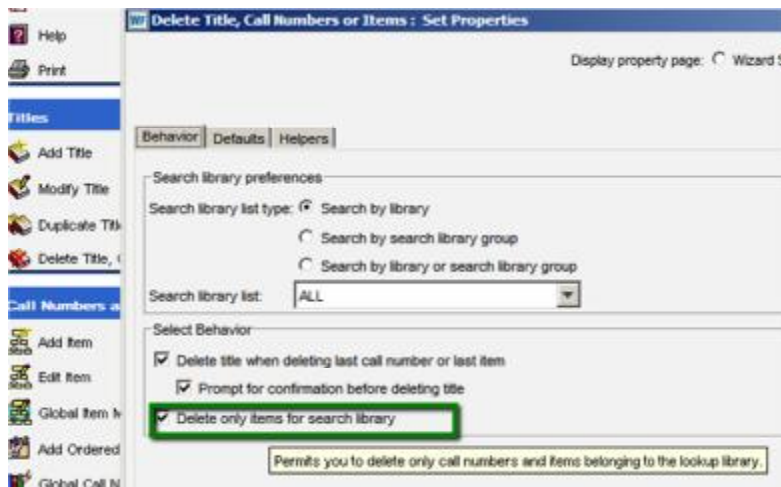
Serials Solutions Update

- Maintenance: working to improve the representation of subscription packages to reflect how we have purchased the package instead of how Serials Solution represents the package. Training: started training Robarts staff in June and training ongoing.

- **Serials Concatenation:** started this project again; recaptured Serials data, looked at scripts for master records; 26000 records with ISSNs will be part of the test pool. Marlene requested that CAUG members send the contact information for their main serials staff contacts because she may need to get in touch with them for this project.

Deletions update

- Marlene reiterated the need to be cautious when deleting holdings as one library was doing a shelf-reading project and noticed some books not in the database anymore; found one library was inadvertently deleting other records.

Q: Why does Sirsi even permit other libraries to delete another library's records? Moving to individual logins which ITS is looking into may address this problem and enable more granular controls.

You can set the properties for delete title to only permit you to delete items belonging to the lookup library.

General questions for Marlene

Q: Why does it take so long for records to be uploaded to OPAC - new books? M: it has to be every night as part of the batch load, and there would be load issues if individual records were loaded during the day.

C: When trying to use the EIR form receive message that access to the page is forbidden. M. will report to MARC.

4. RDA and authority records update (Alastair)

- RDA Authority records – Alastair's advice at the previous meeting still applies: don't worry about completely converting RDA to AACR2 records; hoping before Christmas Endeca's display will be improved.
- As of March 31st, 2013 only RDA authorities records will be acceptable after that point for NACO/SACO libraries
- **667 LC Auth Records:** anyone importing LC auth records will have noticed records 667 all in caps "this heading cannot be used in RDA until reviewed and updated." This is referring to a review process looking at specific parts of the record, such as:
  - o creation of new fields - subfield d for date goes into own field in authority record and descriptor fields
  - o changes of terminology; e.g. headings beginning with word bible
  - o no abbreviations

Some of these can be updated by an automated process; phase 1 run process to identify whether a record has to be reviewed to see if it meets the criteria to be automatically flipped; phase 2 is when the flipping of records will actually happen.

PCC provides a more detailed explanation of the acceptable headings implementation and changes to RDA authorities here: http://files.library.northwestern.edu/public/pccahitg/ The first and last one on the list are the most pertinent.

  - o OCLC - hybrid records will exist for sometime - record itself could still be AACR2 with RDA authority records; descriptive rules are not what enables people to find an item, the authorities records do.

Q: could you clarify should we load LC records with the 667 notes? Yes.

Q: what's your vision for this training, we will need it. Likely to be spring because we do not want to train too early until we are actually using RDA.

5. An overview of the new "Requirements for Participation in the University of Toronto Union (Alastair)

Larry Alford is drafting a document due to the continued requests from other hospital libraries to become part of the UTL system. Overall it will not be controversial to current members, but Larry Alford thinks it should actually be set in writing.

      Some requirements set-out in the document:
- o Cataloguing expectations and standards
- o No deletion of another library' holding or modification of them
- o Each library will have to have a librarian in charge
- o Account permissions: appropriate to the work they do, accounts will not be transferable
- o libraries will charged to repair major repairs to catalogue if they accidentally delete or otherwise modify other library's records

Q: what about upgrading a record? Alastair said that that is still acceptable. One record for the same item; rare and special materials recognized as being different and can have separate records.

Q: How can any of this be enforced? Again the move toward individual logins will assist with this; each login will match to a station-number so it will be easier to determine who is doing what.

6. Consultant's Report (Alastair)

- A consultant was brought in to improve workflow in the central libraries which has implications for all libraries; the report is not out yet, but Alastair can discuss the following prior to its release:

  - o Polite complaints about the understaffing of the central system; concern about their ability to cover the workload on tasks required by the entire library system.
  - o Holdings in WorldCat - suggested to be updated nightly like Library of Congress, but done only a couple of times a year; confusing to user; have received complaints, especially from authors not seeing their item; but the item actually has been catalogued; students googling for books, often go to WorldCat first before the UTL catalogue.
  - o Single U of T identifier for UTL libraries in WorldCat to simplify batch-loads has been discussed again. Alastair mentioned that we'll need to find out from individual non-central libraries what they think about this. Scripts have to be revisited anyway; there are problems with the upload.

Q: if we do come to an agreement, is it possible for the federated colleges to have a live link from WorldCat? You can actually contact WorldCat to set it up.

Comment: if you have an account with OCLC Connexion - there are budget implications; you can earn credits for batch uploading of records.

6. Next meeting: 5 November 2012.