

Minutes of the Cataloguing and Authorities User Group Meeting January 20, 2004, Robarts Library Room 4049, 10:00 am

Present: Elizabeth Black (CDC), Maria Angelina Borges (SMC), Alastair Boyd (Robarts), Julia Callaby (Robarts), Mary Canning (UTM), Susan Cozzi (ITS), Joe Cox (FIS), Sr. Margaret Ann Cuthbert (SMC), Sharon Dyas-Correia (Robarts), Astrida Ezergailis (Regis), John Fodi (Music), Gangi Gopaul (OISE/UT), Steve Greiner (Robarts), Diana Liang (UTSC), P.J. MacDougall (Massey), Kate McNair (MC/AVL), Kathryn Roberts (Law), Sirpa Ruotsalainen (Trinity), Rosemary Smith (Robarts), Arthur Smith (ROM), Sherry Smugler (DMGIS), Eva Spevak (Robarts), Stephanie Swift (OISE/UT), Chris Tucker (Knox), Georgia Vastaki (OISE/UT), Josy Visccher (Robarts), Nancy Wesson (Victoria)

Guest: Joyce Chyrski (Robarts CD)

1. Other Business, part 1 [*The agenda was re-ordered to accommodate Susan Cozzi's early departure*]

Susan Cozzi (ITS) asked the group about possible reasons why there were almost twice the expected number of AG-Canada searches for the year just finished. Is it because we lost access to CANMARC records through DRA/NETCAT? Sherry Smugler (DMGIS) said that for cataloguers with a lot of Canadian material to process, the AG-Canada database was the only reliable alternative for Canadian cataloguing for much of the year. Other libraries agreed. [*See Business arising, 3.ii, below*].

Susan also requested that any group members interested in learning about Voice Recognition software as a solution to Carpal Tunnel Syndrome should contact her directly. ITS is setting something up.

Finally, Susan mentioned the forthcoming transition to "AGent" — AG-Canada's new interface for searching, etc. Preview accounts have been created for the Central Library to try out. Work done through these accounts is not lost, or in a test database, so cataloguers can do actual work while testing.

After Susan's departure, Alastair Boyd (Robarts) said he would put the subject of AGent on a future agenda, for discussion along with the pending new web search interfaces for RLIN and OCLC.

2. Approval of Minutes of November 25th, 2003

Approved as written.

3. Business Arising from the Minutes

- (i) *Central Library Vendor Records:* Robarts Collection Development has confirmed that it is OK to overlay / update Vendor records. Overlaying such a record should not touch the existing VENDOR Call number and Copy record.
- (ii) *Progress on loading of CANMARC file:* Maks Okrasa and Tom Chan have been working on this. At this point we are waiting for ITS to set up a computer as a server to hold the database.

4. Report from the Campus Database Co-ordinator

- (i) Elizabeth Black (*CDC*) has continued working with the OPAC display subcommittee, along with Joe Cox (*FIS*). From now on the “Full” display will show all the bibliographic data except for control numbers and private notes (e.g. 592).
- (ii) Elizabeth is still working with ITS on the conversion of 852 location codes for MARC holdings in tandem with Sirsi Holding codes. As discussed at our last meeting, these holdings codes are messy. A number are redundant, some include non-existent Locations, and so on. Before making any changes, deletions, etc., Elizabeth would like to discover who is using which codes. She requests that Cataloguing & Authorities Group members act as liaison for this, in cases where members are not themselves working directly with these codes. She has created an enormous list of all the codes currently defined in Sirsi, showing the corresponding Library, Location and Material type associated with each. Some members of the group may be surprised to see how many codes their libraries have. Alastair will put this document up on the Cataloguing web page, so everyone can look for their codes. Then group members can let Elizabeth know which are correct and being used, which need modifying, and which could (if possible) be dropped. (This is *not* the time to request additional codes, Elizabeth suggests....) [*The list of codes can be found at <http://www.library.utoronto.ca/robarts/cataloguing/group-minutes/hcodes.pdf>*].
- (iii) Elizabeth is still discussing with ITS the automated migration of 090 subfield \$d holdings information. This is most important for serials, where we need to move this information into the MARC holdings 866 field. For multi-volume monographs, some members of the group questioned the need for holdings records to be created in addition to individual call numbers for each volume—it would make it necessary to maintain a holdings record for continuations, as well as contents notes and call numbers. If this automated conversion of 090 fields is ultimately extended to include monographs, some libraries may ask to be excluded.

5. New Libraries added to SmartPORT

Alastair has been investigating possible new sources of records to add to the SmartPORT list. Three potentially useful academic library catalogues are Memorial University, Duke University, and Yale. Alastair has found the Z39.50 servers for these to be stable and reliable for the last two months, so Tom Chan has inserted them in the SmartPORT list. Arthur Smith (*ROM*) asked if this list had to be alphabetical. As it grows, it would be helpful if the most important targets could be grouped together at the top. Alastair will check with Tom or Maks to see how we can achieve this.

Alastair will also ask Tom if he can add the University of Alberta to the list. Several group members think it would be useful, particularly as a source of AV records. (Unlike others on the list, U of A does not maintain a public Z39.50 server, so it will require their co-operation and assistance). Alastair emphasized that we can add or remove servers from this list, based on the collective wishes of SmartPORT users. He also stressed that these additional databases are primarily for those campus libraries without OCLC accounts who would like other sources of records than LC and AMICUS. All the records to be found at Duke U or Yale are also in OCLC and/or RLIN, so campus libraries already paying for these latter databases will not find additional records by searching the other library catalogues directly.

6. Multiple Order records on a single Bibliographic record

There has been some correspondence on the CatInfo list about the potential liabilities when one library hitches an Order Record to another library's existing call number. Carmen Socknat (*Victoria*) has not only pointed out the pitfalls, but suggested a solution in her e-mail to CatInfo dated Jan. 9, 2004. (I.e., to put the Add Volume button onto the Acquisitions toolbar, and to use it on an existing Sirsi record first to create a new dummy call number with no copy; then to link the order to that new call number). Several members have adopted her procedure and say it works well.

7. Home Location for non-circulating collections / libraries

Now that users can place holds / requests via the OPAC, it will forestall futile requests if the OPAC makes it clear at the outset that you can't sign things out from certain libraries. The question is, how best to do this? Unfortunately, to un-check the "circulate" checkbox in the Workflows copy record has no effect on the OPAC display. For some libraries, e.g. Business, the home location can be set to LIBRARYUSE instead of STACKS; that way, the location shows as "For use in Library only" in the OPAC.

However, libraries like the ROM or DMGIS have to use the home location to indicate a particular collection within their broad library name. When these sub-units need to be further subdivided into circulating or non-circulating material, how can this be shown in the OPAC? Ideally, Sirsi would generate a message based on the status of that "circulate" checkbox. Since we don't know when or if that will happen, another option would be to use the PUBLIC note now available in the copy-level record in Workflows. This is new with Unicorn 2003; the note displays in small type in the OPAC after the copy and location information [or will once the 2003 OPAC is implemented at U of T]. Alastair will ask ITS whether such notes can be batch-generated for large numbers of existing ROM records.

8. Other Business, part 2

Several of the group requested a training or information session about MARC holdings. Elizabeth has created a hand-out on this, based on the MARC 21 manual, distributed at our November meeting. She suggested that since she does not actually create Sirsi holdings records herself, a training session had better be led by, or at least in conjunction with, someone with practical experience. Carmen Socknat (*Victoria*) was mentioned as a good candidate. Since Carmen could not attend this meeting, we will ask her about this before we meet again.

Meeting adjourned at 11:40.