Cataloguing and Authorities Users’ Group Meeting Minutes
October 3rd, 2016 10-11:30am
Alice Moulton Room, Gerstein

In attendance: Mary Jaques (St. Augustine's Seminary), P.J. MacDougall (Massey College), Lisa Andrews-Attwater (Rotman), H. Rashid (Law), Carmen Socknat (EJ Pratt), Lana Soglasnova (Robarts), Elisa Sze (iSchool Inforum), Irene Wu (ROM), Wendy Li (Hong Kong), Remi Pulwer (Kelly), Lauren Williams (Fisher), Mary Reynolds (Regis), Susan Williams (UTM), Joan Links (Media Commons), Blair Kuntz (Robarts), Fabiano Rocha (Robarts/East), Anna Slawek (Robarts), James Mason (Music), Alastair Boyd (Robarts), Ravit David (Scholars Portal), Julia Borie (Robarts), Jordan Hale (Map & Data); Kate MacDonald (Trin)

Regrets: Marlene Van Ballegooie (Robarts), Anne Gillivray (Knox), Liz Ridolfo (Fisher)

1. **Agenda for today’s meeting**
   - Annual report
   - RDA implementation

2. **Minutes from the June 6, 2016, meeting**
   - The minutes were approved.

3. **Annual Report**

   CAUG is required to submit an annual report by November 11th, prior to the Town Hall meeting. All UTL committees will be required to submit a report that will be compiled into one and shared with UTL staff. UTL staff may raise questions or suggestions about the reports at the Town Hall.

   Kate MacDonald has posted the template for this report on Confluence, and asks the group for suggestions regarding ‘recommendations and proposals’ and ‘2016-2017 work plan’. [KM edit: it will go into Confluence eventually, but pending sorting out access for everyone, here it is on [Google Drive](#)]

   Suggestions put forward by the group:

   For ‘recommendations and proposals’
   - Implementation of RDA is main goal
   - Collaboration with Reference Services committee after RDA implementation
   - Collaboration with/support from ITS to facilitate transition to RDA and operation of OPAC after implementation
   - Creation of RDA training materials and schedule
CAUG could highlight important resources we’ll need for RDA transition, such as continued access to RDA Toolkit.

Transition to OCLC Connexion (for those libraries that don’t yet use it)

For ‘2016-2017 work plan’

- Implementation of RDA
- Working toward new LSP platform
- Harmonizing online location of CAUG information. Administrative material can remain on Confluence, but training material can be made publicly available.
- Addressing RDA cataloguing for special collections

Kate will assemble and submit the report, but will make it available/editable on Confluence until then.

4. RDA Training Update (Julia Borie)

Chris Oliver from the University of Ottawa (Head of Metadata and Resource Description, and renowned RDA expert) came to U of T for 3 days, and ran a ‘train the trainers’ style workshop.

14 original cataloguers were given a general overview of RDA – descriptive aspects as well as authorities. Chris shared a lot of enthusiasm for RDA, and for how it’s going to help us move toward linked data.

Within this group of 14 cataloguers, some will oversee the training of copy cataloguers, and others will oversee the training of original cataloguers.

Copy cataloguing training sessions will take place on October 18th, 19th and 20th, from 10:30am-12pm, in the e-classroom at Victoria College. Each of these sessions will cover the same material – trainees need only attend one of them. Original cataloguers also do not need to attend any of these sessions – the same material will be covered in more depth at their separate training sessions.

Original cataloguing training sessions will take place from October 31st - November 2nd, in the mornings, in the e-classroom at Victoria College. These will be continuous sessions, so trainees will need to attend all three days. If anyone is unable to attend these sessions, they will be offered again from Nov. 14 and Nov. 15, and Thursday Nov. 24th and Friday Nov. 25th.

More information about these training sessions, along with sign-up sheets, will be sent around via email soon.
Later in the year, the idea will be to have follow up sessions, where people can bring questions and challenges to working groups.

The goal is to have everyone trained by end of 2016, but as we move forward there will be questions and challenges that we’ll take up as a group. There will also be policy questions and guidelines that we’ll need to establish institution-wide.

Training sessions will be as practical as possible with examples. Trainees will be encouraged to bring examples to the sessions, or perhaps to submit them ahead of time.

They may explore webinar sessions for other libraries, such as the hospital libraries, who may not be able to attend the in-person training sessions.

**Additional comments from Alastair Boyd:**

There will be further training sessions available for special collections cataloguers to address specific RDA concerns.

Also working on making training materials available online – copy cataloguing materials will be available soon.

Copy cataloguing sessions are intended to give staff a sense of what they’ll see now that RDA records aren’t being machine-transformed back into AACR2 – why new things are there, how to read these records, what not to delete, etc. Also, the kinds of things you can update if you’re looking at an older record, without converting it completely.

Key parts of the original cataloguing sessions will be training around access points/authority work. Working toward creating full RDA authority records in OCLC Connexion, so that eventually we’ll be able to contribute these records to LC.

Connexion users so far are mainly non-Roman language cataloguers, because the characters are easier to access in Connexion than in Sirsi.

Even though we’re moving toward a new LSP, using Connexion will still be useful in order to create authorities, so it’s worthwhile to learn to use Connexion.

Marlene is preparing a timeline this fall for moving to new LSP, approx. 2.5 yrs.

CAUG has also asked Marlene to look into whether the default Sirsi template can be changed to more easily accommodate RDA (ex. 300 fields).
Relator terms: Currently, some authorize, and some don’t. In Sirsi’s world, there are about 5 bibliographic formats: MARC, music, serial, etc. For each of these, you have to configure fields and subfields that can be authorized. This just needs to be tidied up, so that it’s consistent across all of Sirsi’s formats.

- So for now cataloguers should leave relator terms in, because they will authorize once Sirsi is reconfigured.

In addition to Marlene, Kate will invite someone from ITS to next CAUG meeting to discuss display matters related to the transitions and to get an update on outstanding catalogue matters.

**Additional announcement from Julia Borie**

There will be a meeting this Wednesday, October 5\(^{th}\) at 11am, in room 6003 in Robarts Library, for anyone who would like to learn more about the basics of serials control models.

**Next CAUG meeting dates:**

Monday December 5, 2016 from 10:00-11:30
Monday March 6, 2017 from 10:00-11:30
Monday June 5, 2017 from 10:00-11:30