

BYU-Provo visit to BYU-Idaho September 15-16, 2004

Ranny Lacanienta, Grant Laycock and Carla Kupitz requested CES funding to visit the McKay Library at BYU Idaho with regard to the BX8600 reclassification project, RLIN21 client administration, Unicorn Workstation adjustments, and other miscellaneous issues related to cataloging and library systems administration.

We arrived at the McKay Library in the afternoon on September 15, and began our separate and then joint discussions with Chris Fox, head of cataloging, and Mat Miles, library systems. Brooks Haderlie joined the conversation as his schedule permitted.

With regard to the BX8600 reclassification project, the plan we propose would utilize the resources of both schools to bring the McKay library's BX8600 collection in sync with the Harold B. Lee BX8600 collection. Future cataloging of Mormon materials at the McKay Library either from BYU-Provo source copy found on OCLC or through WorkFlows on the Unicorn workstation would be utilized thereafter to ensure continued use of the agreed upon Mormon call number scheme and enable continued resource sharing of cataloging data between the two libraries.

During the discussions, every effort was made to utilize programming to reduce manual work. The following outline details the tasks that need to take place.

The project was divided into four phases. Each phase is further subdivided and each task has an owner.

The decision was to work with the existing McKay BX8600 collection first and then reclassify and incorporate the remaining Mormon books currently cataloged in other subject areas and scattered throughout the library after Phase 1 was successfully completed.

Phase 1

Identify programmatically all materials in the McKay BX8600 collection that have an ISBN number or not. The ISBN numbered materials will then be matched programmatically with their counterparts at the Lee Library if a copy of the identical title exists. This will reduce the need for manual intervention, although quality control will still be needed throughout the project.

The same report used to identify the titles with ISBNs would generate a report of titles without ISBNs that would need to be matched manually. The manual work will be done by catalog department personnel in the Lee Library.

Phase 2

McKay records without an ISBN will be matched with a bib record from the Lee Library. The McKay control number from the initial report will be used to find a matching bib in the Lee catalog. The Lee library will add a 946 and 947 tag to their own bib records. The 946 will contain the McKay control number and the 947 will contain the call number.

These local tags will be used as match points. The records will then be extracted and sent to McKay to overlay the current records.

This phase also includes the records that have ISBNs that were matched programmatically and then sent to the McKay library to load. Lee library personnel will check the quality of these records. McKay library systems will load the file. These new records will overlay the current McKay bibs, BUT they will NOT overlay the current call numbers. It was felt that this should be part of Phase 3. Logistically this needs to happen rather quickly and with careful coordination with Circulation and Lettering. The call number and holdings data will be changed on site by two (?) Lee Library staff members during this next phase. McKay will do the re-lettering of the materials.

Phase 3

Holdings of all McKay BX8600 titles will be done manually for quality control and to assure that titles are done in a timely manner to mitigate the disruption to patrons. Lee library personnel will change the holdings information and McKay staff and students will help with lettering and the logistics of bringing and returning truckloads of reclassified materials to the stacks. It would be ideal to have a staging area for the reclassified titles prior to the reshelving which will need to take place.

Phase 4

Locate titles throughout the library that need to be integrated into the BX8600 collection. The magnitude of this project is somewhat unknown, but it appears to be rather large. The same procedures previously outlined would be done to process these materials. Circulation may need to be alerted that this could cause a huge shift in the collection

A timeline was discussed for this project.

Phase 1 and Phase 2 would start immediately and continue throughout Fall 2004 and Winter 2005.

CES funding would be requested to complete Phase 3 in Spring or Summer 2005.

Phase 4 would be examined during this period, but nothing would be done until Phase 3 was completed.

Action Items (Tasks)

Grant and Ranny will run a seltex report to see if the 946 and 947 tags are available for use at the Lee Library.

Mat will create a report of McKay BX8600 titles with and without ISBN numbers.

Mat will send the results of this report to Ranny and Carla.

Ranny will use the results of the ISBN report to generate a title match with the Lee library records. He will include the Idaho control key in the 946 tag of the Lee records.

The Lee library will check this report for quality control.

Ranny will then send this file to Mat.

Mat will load the file and overlay the current McKay BX8600 bibs. This will NOT overlay the current call numbers.

Carla will use the results of the report without ISBNs to start looking for Lee library records. Staff will add the 946 tag for McKay control keys and the 947 for Lee BX8600 call numbers in the Lee bib records.

Staff will look for records on the national utilities for those items not held at Lee. Dale Swensen, Mormon cataloger at Lee, may be asked to assist with the classification of titles not held at Lee. Dif eds will be used as much as possible to mitigate the impact on his time.

Once this work is done, Ranny will extract these NON-ISBN records and send the file to Mat.

Mat will load the file and overlay the current McKay BX8600 bibs. This will NOT overlay the current call numbers.

Lee library staff will travel to the McKay library and cut and paste the 947 call number into the Horizon holdings.

McKay staff and students will assist in re-lettering, shelving, etc.

Begin Phase 4.

Status report of tasks completed to date (September 20, 2004).

Grant and Ranny have run the seltxt report and have cleared the use of the 946 and 947 local tags in the Unicorn catalog.

Grant has added the 946 and 947 tags to the Unicorn catalog format. He has added the |a and |b as valid subfields to the 947 tag.

Mat has run the report on the McKay BX8600 titles with and without ISBNs. He has sent the report to Ranny.

Ranny is working on the ISBN report.

Lee Library staff employees are working on the non-ISBN report.

We are in the process of testing whether or not the original call number can be retained when the record is imported.

Other Items

We left Rexburg on September 16 after spending the morning continuing our conversation regarding the reclassification project and setting up workstations for the RLIN conversion to a web client and testing the exchange of records between Sirsi and Horizon.

Ranny installed the RLIN21 Client on Brooks PC, two staff PCs, and 2 student PCs. Grant provided the override for Chris to view the MARC display in Modify Title on his PC. Grant and Ranny had a chance to visit with Bruce Bills and Joe McWilliams. This was a great networking opportunity for them. We all worked on record transfer procedures from WorkFlows to Horizon with Mat. Carla counted and assessed the McKay BX8600 shelves.

Ranny and Grant met with Bruce Bills to discuss the testing of the new CES wide authentication scheme with Illiad.

Mat shared with Grant and Ranny the procedures he had created to assess the patron use of the library web pages. His research was rather extensive and was developed into a PowerPoint presentation which he made available to them.

We feel the trip was very beneficial and appreciate the CES funding we received to make this project a reality.