

Catalogers Group Minutes December 13, 2001

Present: Gia Aivazian, Sharon Benamou, Valerie Bross, Elie Chammou, Beth Feinberg, Joan LoPear, Janice Matthiesen, Renee McBride, Luiz Mendes, Caroline Miller (recorder), Nancy Norris, Paul Priebe, Jean Rashedi, Louise Ratliff, John Riemer, Angela Riggio, Jeff Sundquist, Rita Stumps

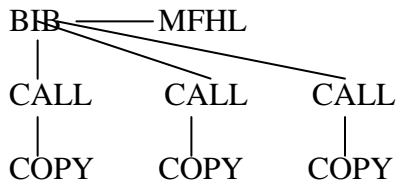
Angela Riggio reported on the December 10th afternoon session of the Sirsi Unicorn product demonstration.

John Dickson, Vice President of Product Management for Sirsi gave a 2 hour and 40 minute presentation during the afternoon session. He demonstrated the Workflows Client, mainly discussing the circulation portion of it. You are unable to see MARC tags in the circulation module. If circulation staff needs to go into another module of the system (e.g. to add a barcode), it is easy to do.

The highlights of the Workflows Client include customizable toolbars for each section of the client, designed for functions in that area (Circulation, Acquisitions, Serials, and Cataloging). The term wizard was used to describe the sets of functions that go together, like the Circulation Wizard, the Cataloging Wizard, etc. Administrators can devise toolbars for certain functions, put them on the server, and they can be made accessible to appropriate staff. There are keyboard equivalents to all the mouse clicks, otherwise the product would be extremely mouse intensive. The report writer function is an integrated part of the system. There are over 400 pre-set reports and it looks like anyone can ask for one. They can either be e-mailed or printed. They can also be loaded into a spread sheet program.

Unfortunately, very little was shown of the cataloging module. The Cataloging Wizard record creation template looked like a 3 x 5 card, with each field tag on a separate line. Most of the people doing their cataloging in Sirsi catalog in-house and upload their records into OCLC. The range of options we have for getting OCLC records into Sirsi is not clear, e.g. whether OCLC records can be batch loaded, as we are currently doing in ORION2.

The record relationships between bibliographic and holdings records are quite different from what we are used to. There is the bibliographic record, and attached to that is the holdings record. The holdings record is really just a record that holds the call number and the location.



The call number record is indexed, but it is only connected to the bib record, not to the holdings (MFHL) record. For volume sets, there is another type of record called the copy record that would be associated with the call number record. Volume numbers are kept in the call number record, barcodes are kept in the copy record. The holdings record was really created for serials. Luiz Mendes queried about what if the book did not have a call number, as is the case with many old IP records. That issue was not addressed. Sirsi supports the MARC format for holdings (MFHL) but it is not integrated as it is in TAOS.

Berit Nelson, VP of Product Management for DRA (now Sirsi as well) talked during the last scheduled 30 minutes of the afternoon session and then answered questions for about 40 minutes. She showed a PowerPoint presentation that described the company merger and explained the current state of affairs. There are 400 employees in the newly merged company, 30% of them are librarians. There are 8000 Sirsi Unicorn libraries, representing 2500 systems. Although Unicorn is a stable, functional, and reliable system, Berit admitted that the clients are out of date. Sirsi does have plans to pursue the Z39.50 searching mechanism across databases. Currently Sirsi does not have UNICODE capability. Sirsi also does not have OCLC loader diagnostics. It also doesn't have 130/240 uniform title indexing but will be working on it. You also cannot view full MARC authority records from the OPAC. The system can, however, sort by call number, author, or title either before or after your actual search. One major downside of the Unicorn system is that it can take up to 10 days to rebuild the browse index and the system must be shut down during that process! It can also take 2-3 days to rebuild keyword indexes.

The TAOS version 1.2 that is to be released in February 2002 will be the final version. TAOS will, however, be supported until everyone can migrate to something else. TAOS extract programs will be written, but no one has migrated to anything else as yet. Sirsi/DRA expects everyone to migrate off of TAOS within the next 1-1 ½ years.

John Riemer then presented Terry Ryan's summation to AdCon regarding her views on the Sirsi Unicorn system.

Pro: The Sirsi system is complete, scalable, and stable. It works well in large libraries.

The uglies: No UNICODE; no non-roman vernacular script capability (a showstopper for Terry); no keyword in heading index; no indexing of holdings records; downtime to rebuild indexes is unacceptably long. Due to the extremely long downtime, work arounds would have to be developed, e.g. having a parallel circulation

system, and having a read-only copy of the OPAC. Defining a new index in Sirsi involves rebuilding all the other indexes. This is not the case in TAOS. Re-indexing to deal with corrupted records is something that large libraries need to do, even if no new indexes are created.

ExComm recently discussed the need to find out more about alternatives. Sirsi plans to end support for TAOS after most customers have had a chance to migrate to Sirsi or to choose another system. Even if we made a final decision on a new system by next month, we will need to remain with TAOS for 1-1 ½ years before migration can be completed. We should not choose Sirsi just so that we can delay our decision on a better system. If we are going to move to Sirsi, we should expect to stay with it for at least 5 years. Claire Bellanti noted at the AdCon meeting that we lose data in every migration.

There will be a team of 5-6 people chosen to look at Sirsi and Ex-Libris from now through late February/early March (Note: this was later changed to include looking at the Endeavor Voyager and Innovative Interfaces systems in addition to Sirsi and Ex-Libris CRM). Vendors would be invited to UCLA for 2-3 days of in-depth demos that all staff could participate in. The team members would also go to look at actual installations of the systems, to compare reality to what the vendors say.

A call for nominations for people within the Library who should be on the team will be going out to members of AdCon and advisory committees. Areas of expertise that need to be covered include circulation, cataloging, OPAC, acquisitions, serials, SRLF, private files, non-roman, and indexing issues. Dual expertise is going to be required if we are to cover all those areas with only 5-6 people. The team is expected to provide AdCon with a pro & con analysis.

Valerie Bross asked about whether or not there would be a faculty member on this team, considering that the faculty wasn't involved in the ORION2 decision making process. John thought that more direct involvement this time was a possibility.

Louise Ratliff asked about editing capabilities in Sirsi. Angela replied that there was no full screen editing. She also mentioned that in the afternoon session, they did not see the Acquisitions or Serials modules.

Luiz Mendes inquired about the impact on undergrad students, graduate students and faculty. He mentioned that they need to be high on the list of priorities.

The next Catalogers Group meeting will be on Thursday, Dec. 20th in the East Electronic Classroom.

Jean Rashedi announced that on January 10, 2002 the Department will be receiving a Microsoft XP product update session to be taught by Leslie McMichael, Terry Ryan's Administrative Assistant. The class will be held from 2:00-3:30 in the West Electronic Classroom.