Recommendation of the User Experience and Metadata Committee

For Continued Loading of Authority Records in the INN-Reach Catalog

March 5, 2018

The MOBIUS Board has asked the User Experience and Metadata Committee to investigate the value of authority records in the INN-Reach central catalog and to make a recommendation regarding the continued loading of authority records in the INN-Reach catalog.

The Committee recommends that the MOBIUS Consortium Office (MCO) continue to load authority records in the INN-Reach (central) catalog as long as the “Classic” interface continues to be supported by Innovative. For this purpose we recommend that MCO arrange with Backstage to generate a file containing authority records from “history files” of all Mobius members who are also Backstage customers and who are willing to participate.

# Background.

MCO currently loads authority records onto the Inn-Reach shared catalog. These records are obtained annually from files provided by Backstage Library Works. The annual files are a secondary product of the authority processing that Backstage and MCO perform quarterly for the cluster catalogs. For each cluster catalog, Backstage maintains a “history file” containing all authority records sent to the cluster, plus any records the cluster reports to Backstage as added to the catalog, minus any records the cluster reports as deleted from the catalog. Ideally a cluster’s history file contains exactly those authority records active in the cluster catalog. For the annual INN-Reach file, Backstage collects, merges, and deduplicates all history files of all clusters.

# Advantages.

These annual loads support certain functions in the shared catalog.

1. In the “Classic” interface, the authority files provide “See-“ and “See-also” references, together with any public notes appearing in the authority records.
2. In the “Encore” interface, the authority files provide suggestions for “Established Terms,” which appear in the left-hand sidebar, under “Related Searches.”

# Disadvantages.

Several arguments have been presented for discontinuing the authority loads. The Committee has heard the following:

1. Authority files in INN-Reach are out of date. This is because the files are loaded annually into INN-Reach, while authority records in member catalogs are updated continuously.
2. Authority files in INN-Reach are incomplete. The files obtained from Backstage are based only on collections of the cluster servers. Standalone libraries who manage their own authority control are not included. MERLIN’s change to standalone status means that its records would be excluded from future loads. This is significant because MERLIN’s history file has made a large contribution to the volume and value of records in the annual files.
3. Loading the authority files into INN-Reach represents a significant amount of MOBIUS staff time.
4. Authority records are less useful in Encore than in the Classic interface. Since Encore was made the default interface to the catalog, traffic to Classic has decreased, and Innovative has indicated that future development of INN-Reach will be made in the Encore interface only.
5. Innovative has indicated to MCO leadership that the Classic interface will be rendered unusable with the implementation of Agency software.
6. No other INN-Reach clients are loading authority records on INN-Reach. This makes it less likely that Innovative will be motivated to support authority-related features in INN-Reach.

# Investigation.

To inform our discussion, the Committee has considered the following sources. Available documents are attached.

1. On July 17, 2017, Innovative arranged a conference call among Donna Bacon, several interested participants in MOBIUS (Stephen Wynn, Denise Pakala, and Jim Pakala), and personnel at Innovative including CEO Jim Tallman. During this conversation, Tallman indicated that Innovative plans to make Agency-based UI changes in both Encore and Classic. He states: “There is no planned EOL [end-of-life] for the Classic Catalog.”
2. It occurred to us that if standalone libraries are also Backstage customers, then their history files may be available for the annual load. Christopher Gould communicated with Backstage, who indicated that this would be possible, provided the standalone libraries gave Backstage permission to include their history files. Standalone libraries who are also Backstage customers include MERLIN, Springfield-Greene County Library and Missouri River Regional Library. Backstage quoted the cost of including these additional files at $500 per year. The current cost of the annual files is $6500/year, bringing the total cost for continuing the authority loads to $7000 per year.
3. The Committee conducted a survey, sent to Library Directors, in order to measure how members perceived the value of catalog features supported by the authority files.
   1. 27 of 47 respondents stated that they (or library staff) continue to use the Classic interface to the union catalog.
   2. 24 of 47 respondents stated that they consider Classic’s “See-“ and “See-also” references essential, compared to 12/47 who considered the references optional.
   3. 20 of 47 respondents stated that they consider Encore’s “Established Terms” feature essential.
   4. 30 of 47 respondents stated that they consider the cost of $7000/year, shared among all MOBIUS members, to be a reasonable cost for the service.
4. Stephanie Ruhe gathered web analytics measuring usage of the Classic interface during a 9-day period, Feb. 12 to Feb. 21. The analytics indicate that the Classic interface still sees substantial use, but that “See-“ and “See-also” references represent a very small fraction of navigation.

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| Number of User Keyed Searches | 21,306 |
| Number of Records Retrieved | 3,218,563 |
| Number of Displays Invoked | 35,232 |
| See X-Ref Selected | 0 |
| See Also X-Ref Selected | 42 |

# RECOMMENDATION.

The Committee’s survey shows that a majority of the Mobius membership continues to perceive strong value in the “See-“ and “See-also” links in the Classic interface, and find the cost for these features reasonable. Despite this perception, we found it interesting that web analytics indicate that the “See-“ and “See-also” links represent only a tiny fraction of navigation actions. It is our sense that Mobius membership feels that the cross-references are tools which are understood and valued by professionals. The “See-“ and “See-also” references may not be heavily used, but are indispensable in those searches where they are needed.

Respecting the arguments under “Disadvantages”,

1. It is true that authority files are out-of-date as soon as they are loaded. This has always been true, however, and the membership has felt that a slightly out-of-date set of records is better than none.
2. Conversations with Backstage have given us the option to continue the authority loads with MERLIN’s participation, and also with the participation of any other MOBIUS library who is also a Backstage customer. Currently that includes SGCL and MRRL.
3. Christopher Gould has told us that the process of loading authority records has become less time-consuming over the last several years. It is difficult to estimate the exact number of hours required because he is able to perform other tasks while the system loads records, but Christopher has indicated that his current process is not especially burdensome.
4. The survey indicates that MOBIUS membership does find authority records less useful in Encore than in Classic. However, Classic continues to see significant use, and the survey indicates that membership continues to see value there.
5. The Committee’s recommendation is based on the assumption that Innovative will continue support for Classic. However, we acknowledge that Innovative has signaled different expectations in different contexts, and we share the concern that Innovative may drop support for Classic after implementing Agency.
6. The Committee shares the concern over Innovative’s commitment to authority-related features.

Considering advantages and disadvantages, the Committee recommends that the MOBIUS Consortium Office (MCO) continue to load authority records in the INN-Reach (central) catalog as long as the “Classic” interface continues to be supported by Innovative. We also recommend that MCO work with Backstage to include the history files of any MOBIUS members who are also Backstage customers and who are willing to participate.

# Attachments.

## Telephone call with Innovative, July 17, 2017



## MOBIUS survey

 

## Web analytics for Classic interface

