

MOBIUS Catalog Design Advisory Committee
March 10, 2006
10:00 a.m.

Attending: Jim Dutton, Fran Stumpf, Mark Wahrenbrock (MCO); Jean Rose, Carol Bennett (Archway); Nason Throgmorton (Arthur); Denise Pakala, Kathy Nystrom (Bridges); Melissa Muth (Galahad); Stephen Wynn (Lance); Diane Hunter, Kathleen Schweitzberger (MERLIN); Natasha Grando (Missouri River Regional Library); Marian Davis (Quest); Anna Zaidman (St. Louis University); Gwen Gilpin, Phyllis Holzenberg (Swan); Andrew McGarrell (Towers); Pat Logsdon, Mark Scharff (Washington University); Susan Beyer (Wilo); Mary Doran (MERLIN, Holdings Display Task Force).

1. Minutes: The minutes from the meeting on Nov. 4, 2005, were approved as written.

2. MOBIUS update:

a. Training Task Force Survey: Mark reported that the survey of users' training needs had been completed. It was sent to 785 MOBIUS library staff members throughout the state, and 464 people responded (59%). Preliminary results are available on the MOBIUS website. The Training Task Force will continue to exist in an advisory capacity, with occasional input requested, particularly on the concept of "members as experts/resources"—the proposal coming out of the strategic planning process that MCO hopes to implement in some form.

b. MCO Director search: Jim reported on the progress of a search for George Rickerson's successor. The search committee, headed by Shirley Baker of Washington University, accepted applications through Mar. 3; met Mar. 9 to review them; will meet again on Mar. 20. Several applications were received, many from out of state.

c. INNReach Enhancement Cycle: The deadline for the current cycle is approximately Apr. 15, to enable discussion of proposals at the IUG conference in May. There will be a birds-of-a-feather get-together for Missouri attendees at the conference.

d. EDIFACT: The executive committee approved the purchase of EDIFACT, an acquisitions product from III that allows clusters using electronic ordering via email to send orders to vendors after January 1, 2007, when ISBNs change from 10 to 13 digits in length.

e. SLU update: Moving SLU records/items to their own server is in process. Suppressed items won't be available for request through MOBIUS until June. In-person requests by St. Louis libraries may be enabled with a work-around during this period.

f. MOBIUS Authority loads: Christopher Gould completed the ~annual MOBIUS authority load last week. 1,835,164 records of various kinds (LC children's, LCSH, MeSH, names, & titles) were loaded.

g. IUG Conference: The conference will be in Denver, May 19-22. Registration is open through May 1 and costs \$225.

- 3. Enhancement requests:** After much discussion, we decided to submit three INNOPAC enhancement requests and three INNReach enhancement requests. The deadline for INNOPAC requests is March 15. These requests were discussed in the meeting, drafted and discussed through emails, and submitted March 13 and 14 by Mark Scharff and Denise:
- a.** The ability to “cherry-pick” subfields from within 007 fields to limit searches more effectively—specifically to easily distinguish DVDs from VHSs or to differentiate varying disc size in sound recordings in searches
 - b.** The authorization of both 956 and 856 fields so that URLs for paid subscriptions and for free titles can be distinguished from each other, allowing for targeted catalog displays [resubmitting]
 - c.** More specific labeling of review files within pull-down menus in Global Update, Rapid Update, and Create Lists so that it’s easier to find the one you want

The INNReach enhancement request deadline is April 15. The following enhancements were discussed and will be refined before submitting:

- a.** Holdings displays that sort by volume number or date, within individual library, within each cluster. Currently, the sort is in order of item creation, within clusters.
- b.** Removal of request button on pages that contain no requestable items; would need to be dynamic.
- c.** Allow the check-in record display [Lib Has statement] in MOBIUS to link back to the local catalog, which would be especially useful if libraries suppress their local holdings in the union catalog.

We discussed adding more subfields/fields to various kinds of searches in Create Lists. Currently, if you create an item list, you can’t then search on all the bibliographic fields, etc. The type of list limits what you can search and sort on. MCO is currently working with III to add all possible searches to item, order, bibliographic, etc., lists, as there is no consistency even among the MOBIUS clusters. There is no expectation that all fields/subfields will be searchable in all search types, because of the underlying system structure, but we’d like to have the maximum number possible.

- 4. Holdings Task Force report:** Steve and Mary submitted their report (Joy Flanders contributed but was unable to attend MCDAC), divided into questions for MCO, recommendations for MCDAC to consider implementing, enhancement suggestions, and notes.
- a. Questions for MCO** concerned the display and requestability of electronic products in the central catalog [Is requestability based on IType and status or just IType? Could we have a new status code that would display as “Click on link” for electronic products?]; the ability to create a list of all bibliographic records with more than a certain number of items attached [Steve will query the IUG list]; can the number of items displayed before the notice to “Click for additional items” in the central catalog be adjusted? [Jim will ask III]; a problem with the display of \$z in the central catalog since the last software release has resulted in item records incorrectly

“inheriting” the \$z and \$u information from an item above them in the display [there’s a ticket open with III].

b. Recommendations for MCDAC included display in the central catalog of only check-in record Lib Has statements for serials and for non-circulating monographs with more than five items; individual items would be suppressed centrally. Initially, this would require a lot of work, and libraries can’t be compelled to do it, although it could be done by cluster by a single person or library, with the help of Create Lists and Rapid Update. Denise will create some basic guidelines, even if not everyone chooses to follow them.

A second recommendation of the Task Force was that 856 fields for subscription electronic products should include the library’s name in \$z and that 856 fields for free electronic products should include “Freely available online” in \$z, unless there’s explanatory information in a \$3. MERLIN libraries won’t be doing the latter because of time constraints. If the 856/956 enhancement proposal is implemented, this will become a moot point.

A third recommendation was that at least one of the links in bibliographic records for Missouri state documents include the \$z Freely available online. Further, if there are different versions offered, the information in \$z should be more specific, e.g., \$z Text: Freely available online or \$z PDF: Freely available online. This could be implemented as MCO loads the batch of records.

c. Enhancement ideas:

- i. Allow the check-in record display in the central catalog to link back to the local catalog. This will be written up and submitted as an INNReach enhancement.
- ii. Allow item records in MOBIUS to display in the order they display in the local catalog. This will be written up and submitted as an INNReach enhancement.
- iii. Make the 956 field hot linkable. This has been submitted as an INNOPAC enhancement.

d. Notes: In OhioLink, a “Lib Has” statement from a check-in record displays as collective holdings in the central catalog, with a status column that includes the words “Lib Has” highlighted in yellow and with angle brackets pointing back to the collective holdings statement on the left. Currently, MOBIUS displays a blank in the status column, since Lib Has statements from check-in records don’t actually include a status field. MCDAC members thought this was a very self-explanatory display, especially when combined with suppressed local holdings at the central catalog level.

- 5. Limit search/sort results in MOBIUS central catalog:** It was suggested that it would be desirable to be able to limit searches by the location of an item, at the cluster level, and also to be able to sort results by date of publication. This would require adding a box for cluster limiting to the MOBIUS keyword pull-down search limits and to add the option at the top of bibliographic results screens. These options would be useful when cluster catalogs are down—patrons/staff could search in the central catalog, while at the same time limiting the search to their own cluster. It

could also be useful for UMKC, for instance, to limit a central catalog search to Wilo and retrieve items in the Kansas City area, rather than to search their own MERLIN cluster and retrieve items from Rolla, St. Louis, etc. Jim will pursue this with III.

6. **E-book limit for the central catalog:** All agreed that an e-book limit at the central level could be useful. Most clusters have this, although SLU, WashU, and MERLIN do not. Currently, WashU includes e-books in their book limit; MERLIN is thinking about including them in their electronic resources limit; SLU hasn't decided. The clusters that do include the limit all use MAT type 2, except SGCL, which uses MAT type y. MAT types could be mapped to enable the limit at the central catalog level. At that level, the book limit doesn't include e-books—they aren't mapped to any search limit. There was no agreement on which category should include e-books, although most agreed that the book limit isn't really used—it's understood to be the "default" retrieval.
7. **710 display issues:** Standardization in indexing is required among the clusters and at the central level, and between parallel bibliographic fields and authority fields, for retrieval displays to be the same across catalogs. Re-indexing—or something that obtains the same results but can be done by MCO rather than paying III to do it—will be done to the central catalog first; then the clusters can be re-indexed, upon request. Jim will send out specifications for clusters to consider. SLU's indexing specs are, perhaps, a model to follow; they added only one or two subfields to MERLIN's.
8. **Cooperative cataloging of selected electronic collections:** Denise reported that MLNC/OCLC see no problems with creating and sharing bibliographic records for electronic items within a consortium. Logistical problems include adding individual library holdings to OCLC (for collection analysis purposes, etc.), finding a way to transfer records among clusters, and sharing the responsibility among libraries to create the bibliographic records. Denise also reported that MCMAC is interested in any decision MCDAC might make concerning projects of this nature, from a collection analysis angle.
9. **Genre term usage:** Denise reported that Maryville is using 655 fields to note that a title is free through the internet. Kathleen shared UMKC's genre heading procedure for electronic resources; she may be presenting at the MOBIUS conference in June. Local genre headings, as well as those from standardized sources, are being used. They are accessible with keyword indexing.
10. **Nomenclature change:** It was suggested that column headings in the central catalog holdings display be changed. Currently, the far left column is labeled "Library" and the next column is labeled "Shelving location." The group voted to change these headings to "Cluster" and "Library location," respectively, since these terms more accurately reflect the information displayed in these columns.

11. Miscellaneous additions:

- a.** Jim reported that multiple batch bibliographic record loads don't have the same match point—to include those from Serials Solutions, Ebsco, etc.—so duplicates are appearing in the central catalog.
- b.** Pat mentioned that WashU has noticed that WashU master records, for which WashU no longer has holdings, still remain in the central catalog. The system doesn't automatically go to the next institution to replace a master record, just because holdings are withdrawn.
- c.** Pat also mentioned that WashU is still seeing 2nd indicator 2 in 970 fields loaded in their TOC project.

12. Next meeting will be on July 14, 2006.