

**MOBIUS CATALOG DESIGN ADVISORY COMMITTEE**  
**REVISED DRAFT MINUTES**

*July 11, 2003*

The meeting was called to order by Joy Dodson, Committee Chair.

Attendees were:

Sherry Mahnken - MERLIN  
Maggie Trish - MERLIN  
Mary Ann Mercante - Bridges  
Denise Pakala - Bridges  
Bonnie Sanguinet - Archway  
Debbie Woolverton - Archway  
Stephen Wynn - LANCE  
Joy Dodson - Quest  
Andrew McGarrell - Towers  
Michelle Turvey - SWAN  
Pat Logsdon - Washington University  
Mark Schaff - Washington University  
Georgia Baskett - Arthur  
Karen A. Fiegenbaum - WILO  
Melissa Muth - Galahd  
Jim Dutton - MCO  
Hardy Pottinger - MCO (present for part of the meeting)

**Introduction of New Representatives**

Joy welcomed the representatives newly elected and/or re-elected from the MERLIN, LANCE, Towers, Galahad, Archway, and WILO clusters.

**Additions to the Agenda**

Joy asked for any additions to the agenda. Two additional topics were added to the agenda:

1. The addition of a search limit for bibs which have requestable items (Mary Ann)
2. Automated Authority Control Processing (AACP) (Bonnie)

**MOBIUS Update**

Jim Dutton provided the following MOBIUS update:

- LDR Updating: The file from all participating libraries have been sent to OCLC. Serials staff should be coding checkin records for the December load.
- Union Authority File load is complete. 1,621,581 authority records added.
- Clickable location codes now work for all MOBIUS locations.
- Marcive is adding “Freely available online” to all the records they supply that have an 856. This has not been done retrospectively to the cluster catalogs by MCO; it will be done in July.
- The State Historical Society newspaper collection records will begin loading later this month.
- INN-Reach Enhancement report: No enhancement forwarded for the display of 856’s.
- Automatic Authority Control Processing
  - Turned on
    - MERLIN, Washington University
  - Requested
    - LANCE, Quest, SWAN, Towers, WILO
  - Under discussion
    - Arthur, Bridges
  - Unknown
    - Archway, Galahad
- We will begin testing the Pick Up Anywhere function later this month. We will be meeting with the testers following the MAAC meeting July 22. The testers are June Deweese, UMC-Columbia (MERLIN); Marion Craig, Central Missouri State University (Quest); Scott Britton, Washington University; and Melissa Martin, William Woods University (Arthur).
- WILO Add-ons have been handed over to the MCO Helpdesk. WILO patron-initiated borrowing began July 1st. MOBIUS borrowing will begin before the beginning of the fall semester.
- St. Louis College of Pharmacy is live on Archway. They will begin patron-initiated borrowing soon. MOBIUS borrowing will begin before the beginning of the fall semester.
- The proposed go-live date for INN-Reach borrowing/lending for Springfield-Greene is Sept. 2.

In response to a query on how loans to Springfield-Greene should be counted on MOBIUS statistics (MOBIUS or Non-MOBIUS) Jim said he will add this question to the

MOBIUS Access Advisory Committee meeting agenda (The Access Advisory Committee will be meeting July 22)

In response to a query as to when the LDR information would be displayed in OCLC Union List, Jim said he had no information on that.

### **Minutes from Last Meeting (March 14)**

Joy asked if there were any final corrections or changes to the March 14<sup>th</sup> minutes. There being none, the minutes are now considered final.

### **MOBIUS Conference Recap**

Joy asked for comments on the recent MOBIUS Annual Meeting and asked if there were any topics MCDAC members would like to suggest for the next annual conference. Committee members commented favorably on the variety of topics. In response to a query as to whether people would prefer longer sessions, committee members seemed satisfied with the length and/or would be willing to see one or two longer sessions, but wanted to retain the current lengths in order to attend more sessions. Information Literacy and Middle Managements Issues were suggested as topics. MCDAC members felt comfortable with the Annual Conference having sessions not directly devoted to III and/or MOBIUS, seeing the MOBIUS Conference as a site for programs of interest to academic libraries.

### **Springfield-Greene County Library**

Joy enquired if there were any issues relating to the addition of Springfield-Greene County Library becoming a Cooperating Partner and contributing records to the Union Catalog. Springfield-Greene is its own separate cluster. Jim reported that the MOBIUS Directors had approved the addition of representatives from Springfield-Greene to the MOBIUS Catalog Design Advisory Committee and the Access Advisory Committee as voting reps. Springfield-Greene patrons will have MOBIUS requesting privileges, but will not be set up with Visiting Patron status.

### **III Enhancements (or, Did Anyone Think We Could Have a Meeting Without an 856 Discussion?)**

The INN-Reach Users Group did not recommend any 856 enhancement to III. MCDAC Committee members felt that this was probably not because people didn't want a solution to the 856 problem. The failure to recommend an 856 enhancement was more likely because there were options given as to how to resolve the 856 problem and voters could not come to agreement on which option to recommend.

Joy asked whether MCDAC should continue to recommend an 856 enhancement. The Committee answered affirmatively, but agreed that any 856 enhancement proposal should include only one recommended solution.

Joy will go through the minutes of previous MCDAC meetings and pull out what we've discussed as solutions. She will send this information to the MCDAC list to start a discussion and to provide background for new MCDAC members.

Mary Ann reported she had not yet contacted Susan Lewis regarding a possible OCLC action regarding the 856, but will do so.

Jim encouraged libraries to submit enhancement requests for the INN-Reach software to the MOBIUS Office (since the MOBIUS Office holds the INN-Reach Users Group membership, the enhancement request needs to come from MCO) Libraries which are members of the Innovative Users Groups are encouraged to submit enhancement requests for the Innopac software directly to the Users Group. Libraries which are not members can submit these requests to MCO.

### **New Format for OCLC/MARS Reports**

Jim reported that OCLC now charges fifteen cents per page for printed reports. Since MCO does not have the money for this, MOBIUS will now receive and deliver these reports to clusters in electronic format. Several of the reports are available in more than one format; for these reports, each cluster needs to notify MCO concerning which format it wants.

### **MOBIUS Error Report Form**

Jim reported that information regarding the MOBIUS Error Report Form has not been distributed as widely as it should (two of the cluster contacts were surprised to learn via Jim's MOBIUS Conference Quality Control session that there was such a form and that they were cluster contacts) Since the initial period of usage has gone well and there do not seem to be problems with the form and the process, Committee members should spread the word more widely to their clusters that certain types of errors can be reported via email to your cluster contact who can then use the form to report the error to the contributing cluster. Jim suggested that when reporting errors, folks should also check their own cluster's catalog. If there is an error on a record in the MOBIUS union catalog, chances are the error is on the record in all the clusters which have holdings.

### **Project To Reduce Union Catalog Duplicate Bibliographic Records**

Jim announced that MCO has applied for a grant to undertake a one-time project to reduce the number of duplicate bibliographic records in the Union Catalog.

In this proposed project, MCO will extract records from the various cluster catalogs which meet the following criteria:

1. Record has no 001 tag

2. BCODE 3 set to -
3. Record has a 300 tag (physical description)

The extracted records will be sent to OCLC where, in a batch process, they will be matched against WorldCat records. Where a match is found, the OCLC number will be inserted into an 001 tag on the MOBIUS record. In addition, the OCLC symbol of the contributing library will be set in OCLC. There will be no charges to libraries for this service.

The modified records will be returned to MCO for reloading into the cluster catalogs, where they will overlay on bib # The Millennium software will then use the newly provided OCLC numbers to identify duplicate bibliographic records which will be resolved by library staff. The Millennium software will then automatically resolve duplicates in the MOBIUS Union Catalog.

MCDAC was enthusiastic about the intent of the project and the general methodology. MCDAC members strongly recommended that this project be discussed with the Site Coordinators Committee and that several weeks notice be given to clusters before records are pulled, so that there is adequate time to consider if there might be records which should not be pulled for this project or if there are other ramifications for libraries in a particular cluster.

### **Catalog Redesign Subcommittee**

The Subcommittee has held two meetings. Hardy Pottinger has taken the Subcommittee's recommendations and built some example web pages for review. MCDAC discussed several requests brought to it from the Subcommittee.

*Search and Sort: Request A Change in the Order* Hardy reported that this is hardcoded by III and cannot be changed.

*On the initial MOBIUS page, change the wording on the Numbers search (move "etc." to the end of the phrase)* After looking at several of the cluster catalogs, MCDAC decided to change this to:

Standard Number (ISSN, ISBN, Music, etc.)

*On the "Advanced keyword search" screen, use the title "Enhanced Keyword Searching"* MCDAC decided to use neither, but instead to go with: "Keyword Searching"

*Take the word "Innopac" out of the Title tag on all MOBIUS pages and replace it with "MOBIUS Union Catalog"* MCDAC accepted the recommendation.

*Both "Keyword and Keywords" are used in MOBIUS pages. Standardize with one or the other (subcommittee prefers "keyword.")* This was done on the sample initial MOBIUS catalog screen showed by Hardy. MCDAC accepted the recommendation.

*Bib record display should show keywords searched with a colored background or in red?* MCDAC decided on red.

*Change Non-Requestable to all caps* It currently is in all caps. Joy reported that what the subcommittee intended is to have NONREQUESTABLE really stand out. MCDAC discussed whether it would be better to have AVAILABLE in all caps and put all the other statuses in upper/lower case. MCDAC members should check with their clusters for feedback.

MCDAC looked at three sample screens Hardy had prepared: the Main Opac Page, the Keyword Search Screen, and the Results screen. The look of the Main Opac Screen is purposely different from that of the clusters so that patrons will be able to more easily distinguish where they are.

The Keyword Screen has been redesigned to put the Quicksearch box at the top, followed by the limiting options, then by the explanatory material.

The Results Screen has a Medium column displaying an icon. MCDAC did discuss that e-books will display with the print book icon since the @ used in some clusters to designate e-books doesn't seem to be recognized in the INN-Reach software. Jim will check on this.

All screens are designed for standard size (800 x 600) Hardy has tested on lower resolutions and says the screens look fine there also. Courier font is used in giving examples of things you type; the rest of the font is Ariel-like.

Joy will send the MCDAC list the URLs where these screens can be viewed so that we can share these sample screens with our clusters for feedback. Joy asked that comments be returned to her by Aug 11<sup>th</sup> which is the week before the next Subcommittee meeting. In September, a preview of the redesign will be shown to the MOBIUS Directors. In November, there will be a final presentation to MCDAC. Following the November MCDAC meeting, the redesigned catalog will go live.

When requesting feedback, Joy asked that we try to get feedback on 1) what's wrong/doesn't work (which the Subcommittee has to hear about) and 2) what could make the screens clearer (which the Subcommittee should hear about) as opposed to feedback where someone would have just done it differently.

MOBIUS Level FAQs

The Subcommittee did not work on FAQ. For the November meeting we should seek feedback on whether or not there should be FAQ and, if so, come up with FAQ questions.

### Time-Outs

A Bridges librarian had raised the question of whether the time-out is too short. The question was raised before frames were turned off in the Union Catalog; Mary Ann will check whether the librarian's concern was on the timeout for e-documents, or the timeout in the Union Catalog itself.

### AACP (Automated Authority Control Processing)

The MOBIUS update gave the status of clusters regarding turning on AACP. It is working in MERLIN and Washington University. There still seem to be some problems, but you do get reports of what has been done, so you can catch the problems. Both clusters feel the amount of work that is saved by AACP more than offsets the problems.

MCO is doing a review Authorities workshop for one of the clusters and is happy to do it for other clusters or other regions.

### Added Search Limit

Several MCDAC members expressed interest in the possibility of a limit which would retrieve only bibs with at least one item available. The email correspondence between Gary Harris and Tim Auger of III on this issue discussed limiting based on ITYPE. Limiting by ITYPE 0 would still retrieve bibs where all the items were checked out. Limiting by status - would retrieve bibs where the ITYPE was a non-requestable ITYPE. The best option would be a limit that could combine both the ITYPE and the Available display status. Joy will ask Gary to further investigate what might be possible and will report back at the Nov meeting.

### Checkin Record Displays

A MOBIUS search on the title Psychology of Art serves as an example of the display problem which occurs when there are checkin records for monographic titles. The checkin record displays in the status line:

*NonRequestable Journal* even though the item is not a journal. MCDAC members came up with two suggestions:

1. Leave the status box blank for checkin records or
2. Change the text to: *Summary Holdings*

The change would apply whether the checkin record was for a serial or a monograph.

### Limit by Conference Proceedings

MERLIN announced that it has just implemented a limit by Conference Proceedings based on the 008 field. MERLIN caused all their conference records to be reindexed by creating a review field, suppressing and then unsuppressing the records.

**Schedule of Meetings**

The next meetings of MCDAC will be:

Friday, Nov. 14, 2003

Friday, March 12<sup>th</sup>, 2004

Friday, July 9<sup>th</sup>, 2004

Submitted by Mary Ann Mercante