

**MOBIUS Catalog Design Advisory Committee**  
**November 4, 2005**  
**10:00 a.m.**

Attending: Jim Dutton (MCO); Carol Bennett, Jean Rose (Archway); Nason Throgmorton (Arthur); Denise Pakala, Kathy Nystrom (Bridges); Melissa Muth (Galahad); Stephen Wynn (Lance); Kathleen Schweitzberger (MERLIN); Natasha Grando (Missouri River Regional Library); Pam Reeder (Quest); Anna Zaidman (St. Louis University); Andrew McGarrell (Towers); Patricia Logsdon, Mark Scharff (Washington University); Susan Beyer (Wilo).

1. **Minutes:** The minutes from the meeting on July 8, 2005, were approved as written.
2. **MOBIUS Update:**
  - a. **Training task force:** There were about 21 respondents to the call for volunteers. A brainstorming meeting was held in mid-October, attended by a subset of that group, and the discussion is continuing and expanding through an online list. A report is due to the Executive Committee in March 2006.
  - b. **Training:** Centra training for various modules is available through MCO in one-on-one or small group modes; contact Jim to arrange a session.
  - c. **Release 2005:** This is currently being tested, and will be installed on cluster servers—including new servers for Arthur and Archway—beginning about mid-December. Short Centra recordings updating staff on the changes and capabilities will be available.
  - d. **Authority control:** MCO has received an LSTA grant of \$60,000 for authority control. Pat Logsdon noted that the 2005 annual central catalog authority update was not done. The comment was made that individual clusters need to update their own MARC country, language, etc., validation codes. By the end of this quarter, Jim expects the Mobius catalog will have reached 20 million bibliographic records.
  - e. **970 TOC indicators:** The indicator values were changed in January 2003, a fact that Blackwell didn't disseminate. Prior to 2003, three first indicator choices defined non-distinctive titles that weren't to be indexed [0]; general chapter-level titles for keyword indexing [1]; and distinctive titles for full indexing in the title index [2]. From January 2003 onwards, only two indicators are available: 0 for non-distinctive titles that aren't to be indexed at all; 1 for distinctive titles to be included in the title index. The committee wondered whether contents formerly meeting the old "1" indicator categories would now match the definition of indicator 1 or 0. We also wondered if the January 2003 referred to is publication date or BNA processing date. A complete description of the Blackwell TOC process is available at the Blackwell website:  
<http://www.blackwell.com/pdf/TOCEnrichment.pdf>. The website, dated May

2005, explains first indicators 0 and 1; shows an example on p. B1 of a MARC record using indicators 1 and 2; does not seem to explain or note any historical differences in indicators or their meanings. Archway, MERLIN, and Washington University are paying for TOC enrichment at this time. Some changes may need to be made at the Mobius catalog level. These will be decided on at the next meeting, after the three currently subscribed clusters discuss this and develop a recommendation.

- 3. Holdings Task Force preliminary report:** Steve Wynn submitted a report that identified four categories of displays and their attendant problems: large multi-volume monograph sets (ex.: Psychology of art), serials (ex.: Journal of algebra), electronic materials only available by subscription (ex.: Absolute beginner's guide to personal firewalls), and electronic materials that are freely available and that have various cluster-level shared location codes (ex.: Missouri sunshine law). The task force has been looking at other consortia, e.g., OhioLink, for possible solutions. They see three possible routes: trying to find something MCO can do to "fix" the displays, defining and submitting an enhancement request, or identifying something that can be done to checkin records and suppression codes and recommending that member libraries comply—at least on the most egregious titles. The committee asked that the task force continue to look into solutions, especially those in the first and third categories, realizing that member compliance can't be forced and is unlikely to be applied retroactively.
- 4. Reverse suppression code demonstration:** This new code allows an item or checkin record to be suppressed locally but displayed centrally. It allows a library to control/define its central catalog display by displaying individual item records for a video, for instance, only in the local catalog, since they can't be checked out at the central level anyway. At the same time, the library can create a special note in a checkin record or create an item record that will display the extent of the library's holdings for that title in a single holdings statement—and then display this record centrally but suppress locally, where its presence would only confuse patrons when displayed alongside the individual item records. See local (Arthur) and central displays for the title, Ethical issues in professional life [videorecording].
- 5. Issues from last meeting:**
  - a. Authority redirect:** The consensus of the committee, reporting from their clusters, was that the display of expanded authority scope notes was too misleading. The additional information could be very useful, but we'll wait until the placement of these notes is more logically and clearly linked to the terms to which they refer.
  - b. Removing stop words function:** Steve Wynn presented a diagram of the normalization process that users' searches and MARC records undergo in III catalogs at their default settings. Initial articles are automatically dropped from patron searches and from MARC records, regardless of

MARC filing indicators. This results in fewer failed patron searches, if they are unskilled enough to enter initial articles in their search strings. It also results in retrieval problems for titles that begin with words that only look like initial articles but that shouldn't be overlooked or deleted from the retrieval set. LANCE has chosen to have MARC filing indicators honored, resulting in normalized titles that can begin with "a", "an", etc. (Normalization rule #9). They also chose to keep OPAC system option #2 (set to keep users' initial articles, rather than automatically dropping them). This required re-indexing of their catalog, which III did at no cost.

- 6. E-book limit for the central catalog:** All the clusters have the capability to limit by e-book; some can also limit by e-resources. At the request of the committee, Jim will look into the feasibility of implementing this search limit in the central catalog
- 7. Search limit by 007:** Mark Scharff led a discussion on how specific search limits (e.g., sound recordings in cassette, LP, CD formats or videorecordings in disc or cassette formats) can be implemented in cluster catalogs, based on the first four bytes of 007 fields. He shared a procedure for identifying records that should contain 007 fields and for cleaning up the data contained in them and/or adding the field with Rapid or Global Update.
- 8. 710 display issues:** Author searches on corporate/conference headings retrieve mixed results in various cluster catalogs and in the central catalog, because the 110/710 and 111/711 fields haven't been indexed the same. The delimiter "n" is a particular problem, because it is defined differently in the author and title indexes. Clusters must choose which index reads the "n" subfield, and choosing differently for 110 than 710 makes for mixed search results. Jim also noted that authority indexing needs to be coordinated/matched with bibliographic indexing. Any cluster can keep its indexing as is. If a decision is made to change the indexing in the central catalog, each cluster will need to be reindexed, whether indexing changes have been made or not. The decision to change central catalog indexing should be made before any changes are made to cluster indexing. Jim subsequently emailed a list of each cluster's indexing for x1x MARC tags for perusal. He also suggested looking at some examples:

Do an author search in MERLIN on "geological survey u s v" to see the results of indexing \$n in both author and title indexes. The volume numbers displayed on the browse list are for the title Monographs in \$.t.

To see the results of indexing \$n in keyword only, search Arthur for the author "Food and Agriculture Organization of the United Nations." On line 6 you will see "Conference 1997 Rome Italy." Note that the \$n does not display.

The original display prompting the discussion is viewable in Bridges by searching the author “World Council of Churches Assembly.” Bridges has \$n indexed in the 110 and not in the 710.

- 9. OCM displaying in front of OCLC numbers:** Bridges had reported this problem, since OCLC numbers with this prefix were not retrieved with OCLC number searches in the catalog. MCO fixed it by stripping the prefix, which had mistakenly not been stripped during MARS/Backstage authority processing. Denise warned that other errors have occurred in recent authority processing, so be on the lookout for problems.
- 10. SHARE location codes:** We discussed how different clusters do/don’t use this location code. It’s appropriate for electronic resources that are free or for titles purchased with another institution. MERLIN uses a version of this code for jointly purchased titles and for items attached to paper records with freely available URLs. Bridges uses this code for paper records with free links and for free access to electronic titles.
- 11. Cooperative cataloging of selected electronic collections:** Steve led this discussion about bibliographic records that are created as part of a project to catalog freely available electronic titles (e.g., state library digital archives records created by LANCE) and then share the MARC records among clusters. Some thought this was more of a collection development question that should be forwarded to the appropriate Mobius committee. Some were worried about the legality of it. Jim said MLNC okayed it. Denise will contact MLNC about the specific ethics/legality of the process as it concerns sharing MARC records without searching/exporting from OCLC and not setting holdings in OCLC.
- 12. Merging records and breaking possible links:** Denise introduced this topic as a heads-up that routine record merges—performed as a result of duplicate records being identified in cluster catalogs—could be breaking links to particular records that have been created for new books lists, ERes links, links within professors’ syllabi, etc., since these links are based on the III bib number, rather than on OCLC control numbers. Bridges has decided to copy deleted bib numbers to the 035 field, subfield z, in the retained record. This doesn’t maintain an existing link, but does make it recoverable.
- 13. AACP flip problems:** Mark reported that the 240 partial flip problem has been fixed in Release 2005, which Washington University has been beta testing. He said there is no great way to locate instances of the problem in the catalog, but searching for “selections” in 240 fields will locate many.
- 14. Miscellaneous topics:** A question was raised about MARC record sources. St. Louis University prefers OCLC as a source, whether records are individual or in collections, but has also worked with Proquest.

Washington University reported finding huge gaps in their holdings in OCLC. They are performing a reclamation project to reload all their holdings in OCLC, since they estimate approximately 200,000 holdings (out of 1,500,000 titles) are missing. This problem is either due to faulty EDX batch loads (which they've done for ten years) or to OCLC inexplicably dropping holdings.

**14. Next meetings:** March 10, 2006; July 14, 2006.

Minutes submitted by Kathy Nystrom, 11/09/05.