



## MOBIUS CATALOG DESIGN ADVISORY COMMITTEE

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MINUTES December 8, 2000

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### Chairperson: Karen Letarte, Southwest Missouri State University

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MOBIUS Catalog Design Advisory Committee (MCDAC)

#### MINUTES

Friday, December 8, 2000

Meeting chaired by: Patricia Teter (LANCE-Truman State)

Minutes: Raleigh Muns (MERLIN – UM-St. Louis)

#### Attendees:

Jim Dutton MOBIUS

Hardy Pottinger MOBIUS

Jamie MacInnis (UM-St. Louis - MERLIN - observer)

Norma Fair (MU - MERLIN alternate)

Carol Bennett (St. Louis CC - ARCHWAY)

Fran Stumpf (St. Charles CC - ARCHWAY alternate)

Ted Ostaszewski (Metro CC - WILO)

Pat Logsdon (Wash U. - WASH U)

Andrew McGarell (MO Western - NORTHWEST substitute)

Mary Ann Mercante (Maryville - BRIDGES)

Sue Wartzok (Webster - BRIDGES alternate)

Cathy Roeder (SEMSU State - SOUTHEAST)

Georgia Baskett (Stephens College - ARTHUR)

Joy Dodson (Central Methodist - QUEST)

#### MOBIUS Update (Jim Dutton)

WILO goes live Tuesday, Dec. 12. LANCE had catalog training this week, and records are being loaded.

SWAN records are loaded on INNREACH but items are not yet available for lending. Their go live date for INNREACH is January 2<sup>nd</sup>. INNREACH training will be held next week.

The kickoff meeting for the BRIDGES cluster is today. George Rickerson and MCO staff are in St. Louis meeting with BRIDGES.

#### Authority Control:

MCO is the process of doing authority control loads on ARTHUR, ARCHWAY, SWAN and MERLIN, but the current status of the MERLIN load is unclear. ARTHUR and ARCHWAY BIB records have been reloaded, and AUTHORITY records are now being loaded. SWAN's BIB records are being loaded. WASHINGTON U. reports that they are using ACP and it is working well. MERLIN plans to use ACP once data cleanup is accomplished.

Jim Dutton distributed a report of MOBIUS 3<sup>rd</sup> quarter statistics along with statistics on the Authority Control Processing. Discussion of the reporting and enrichment statistics followed.

## MOBIUS Web Page Redesign

Hardy Pottinger demonstrated new logo options:

[http://sequoia.lso.missouri.edu/screens/compare\\_logos.html](http://sequoia.lso.missouri.edu/screens/compare_logos.html)

After general discussion, the committee recommends that Logo No. 3 from the above URL be adopted with the following modification: remove the horizontal line and move the bar up.

The committee approved the removal of the "implementation icons" from the Members Page, and approved a change to the color of the map. It will be lightened so that the arrows can be seen more clearly. A decision on the Quicksearch box will be deferred to the next MCDAC meeting.

Several people expressed concern that from the OPAC, some patrons may not be aware that they were expected to select their cluster when prompted for institution affiliation. To ameliorate this, Hardy Pottinger has designed a link to the Member's Page (<http://mobius.missouri.edu/screens/libinfo.html>).

### Indexing of MOBIUS Catalog (including additional subject indexing)

Jim Dutton reported that Advanced Keyword Searching is again available which would affect indexing decisions. The current index would be scrapped and the phrase indexes would be included in the keyword index.

Discussion followed on the document: "Suggested Indexing Changes for the MOBIUS Union Catalog" submitted by Mary Ann Mercante on behalf of libraries in the Bridges Cluster. Mary Ann reported that the suggested changes had come from two libraries in the Bridges Cluster. The suggested changes had been distributed for comment to all Bridges cluster libraries and no objections were received. The only recommendation actively voted on by the entire cluster was the "all subjects" index.

The following requested changes will be taken care of by the Advanced Keyword Searching:

- Addition of subfields b and c to the 100, 700, and 800 tags in the Keyword Index
- Addition of subfield 130 subfield l (language) to the Keyword Index
- Addition of tag 502 to the Keyword Index
- Creation of an Author Keyword Index (this will be taken care of by the Author segment of Advanced Keyword Searching)
- Creation of an All Subjects Index (the Subject segment of Advanced Keyword Searching will be a combined LC, MESH, and Children's Subject Heading Index)
- Creation of a Title Keyword Index (this will be taken care of by the Title segment of Advanced Keyword Searching)

The other requested changes were disposed of as follows:

- The committee moved, seconded, and approved the addition of the 260 subfield b to the Keyword Index
- The committee moved, seconded, and voted 5 to 2 with 3 abstentions and 1 cluster absent to include the 533 subfield c in the Keyword Index.
- Because the yes votes were fewer than a simple majority, this topic will be revoted at the next meeting.
- Jim Dutton reported that subfield f in the 533 could not be included in the Title Index because of the parentheses. It would need to come out of the 830.
- The request for separate Subject keyword indexes for LC, MESH, and Children's was withdrawn
- The inclusion of Series Titles with volume numbering designations in the Periodicals Title Index will need to be accomplished on a case-by-case basis through the manual creation of 229 tags.

### Index Labels for the MOBIUS Catalog

There was a brief discussion of OPAC index labels, but since the main impetus for the discussion had come from SWAN, it was decided to table discussion until the next meeting, when the SWAN representative could be present.

### Erroneous indexing of titles

Jim reported that only SWAN and LANCE had elected not to strip initial articles from title searches in the cluster OPAC. Some observed that there are many tagging errors in the Union Catalog, and that the use of standard filing indicators in field 245 would take care of this. The need for clusters to clean up incorrect indicators was expressed.

### Handling of duplicate bibliographic records on INN-Reach

ARCHWAY expressed concern about the occurrence of duplicate records in the Union Catalog, and wondered whether some effort could be directed toward resolving duplicates at the cluster level when possible. It was noted that resolution of duplicates is more difficult for non-OCLC records, as there is often no standard number to match on. Merging of duplicate records is occurring in several clusters. Jim explained that Arthur had decided to handle resolution by agreeing that anyone could merge and fix another member's records, including coding of the item record for someone else's holdings to be uploaded to OCLC once holdings are merged. SWAN has implemented the same policy. Members from smaller libraries expressed frustration at the difficulty of resolving duplicates.

### Mechanism for reporting cataloging errors seen on the MOBIUS catalog

Robin Kespohl's email concerning the issue was reviewed. It was noted that cataloging errors are not reported to MOBIUS. Extensive discussion followed, but no apparent solution was reached. Members will discuss the issue with cluster partners and will report back at the next meeting.

### Guidelines for 970 and 229 usage for posting on web page

Carol Bennett noted that MCO will be giving clusters a book explaining use of 970 and 229 fields, and recommended that clusters receive a copy as soon as possible rather than waiting for training. MERLIN and WASHINGTON U follow similar policies with regard to field 229. MERLIN has created an instructional document, but the need for more explicit guidelines was expressed. Carol Bennett offered to draw up such a document and disseminate it for the committee's use and web page. It will be sent to Karen Letarte for posting on the MCDAC page when done. A discussion of Carol's document will occur on the list.

Jim noted that it is indeed possible to add a 970 field manually, and is only slightly more complicated to construct than an enhanced 505. Some set-up would need to occur if libraries wish to use 970s manually for tables of contents. ARCHWAY would like to use it for short stories and plays.

### Draft Policy on Authority Control

The Committee discussed the draft Policy on Authority Control for MOBIUS which was posted to the Committee's web page on Aug. 29, 2000. The following amendments were made to the policy, and it was approved unanimously:

1) The word "month" will be replaced with the word "quarter" wherever it occurs in the document:

In the 4th paragraph, the 2nd sentence will be amended to read:

"\*Quarterly\*, the MOBIUS Consortium Office will send to the authority control vendor a copy of the new bibliographic records added during the previous \*quarter\* to the databases of each cluster."

In the 5th paragraph, the 3rd sentence: "Each cluster must agree to a formula which the Consortium Office can use each \*quarter\* to distribute the reports."

In Basic Principle No. 2, the wording will be changed from "report of the next month's" to read "report of the next quarter's".

2) Basic Principle No. 8 will be amended to read "should be tagged 65X, and the appropriate second indicator..."  
The revised policy is to be posted soon.

#### Committee Appointments

The MOBIUS Council would like to institute new committee chairs as of July, following the fiscal year cycle, and recommends reappointment on one year or two-year bases. New representatives to the committee would need to be appointed in the Spring. The new chair of this committee should be elected in July of 2001.

#### Meeting dates for the year

Jim Dutton reported that the MOBIUS Council has agreed to reduce the number of meetings from 4 to 3. The probable date of their next meeting is March 21. The next subsequent meeting would occur in conjunction with the MOBIUS annual conference, whose date is not yet set. Jim noted that it would be a good idea to schedule things a year in advance because of room booking pressures.

Proposed future meeting dates are:

April 6, 2001

July 13, 2001

October 12, 2001

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