

Arthur Technical Service Committee met at Mobius Room 118 from 9:30am to 3:00pm on October 12, 2007. Attending were: Susan Morrisroe (Missouri State Library), Tom Schultz (William Woods), Inas El-Sayed (Lincoln), Vandy Evermon (Columbia), Corinne Caputo (Westminster), Corrie Hutchinson, Fang Hung, Genevieve Dawson (Stephens).

Year's objective: To assess where we are now and what we need to focus on for cleanup and for reassessment of our workflows and procedures. If we agree that we need to keep the points listed in our prior minutes of minutes then we need to workout ways that we can actually do such. There are areas such as the duplication in serials records that still remain a problem and are mentioned in prior meeting notes as a problem with nothing developed to solve or relieve those problems, etc.

It is also understood, as per this meetings notes, that what we agree to will be passed to the Arthur Coordinators for final approval before activation of the below agreement changes.

Meeting Objectives:

1. To educate the Technical Service Committee Members in what agreements we have made in the past and to assist us in cleaning up the catalog and maintaining it as per those issues.
2. To evaluate those agreements as per needs to be changed, time constraints, and the quality of catalog we want to have for our patrons and libraries.
3. To locate issues addressed in the Coordinator Meetings that need to be shared with the Technical Service Committee. Perhaps a better division of purpose and charge between the two committees can be realized in relation to what is discussed and how it can help us to be more effective between the two committees.

MOBIUS CATALOGING STANDARDS

<http://mco.mobius.missouri.edu/filemanager/fileview/2633/>

Cataloging standards provide the foundation for achieving reliable online access to all of the materials shared in the MOBIUS Catalog. All MOBIUS libraries, including Cooperating Partners, should adhere to nationally accepted cataloging standards and guidelines according to the documents listed below. Quality and integrity of the MOBIUS database are necessary in order to maintain reliable access to the shared catalog.

Mobius Policy on Authority Control

<http://mco.mobius.missouri.edu/filemanager/fileview/1582/>

Mobius Subject Cataloging Policy

<http://mco.mobius.missouri.edu/filemanager/fileview/537/>

Mobius Index Rules

<http://mco.mobius.missouri.edu/filemanager/fileview/540/>

MOBIUS Guidelines for 229 Field (Journal Magazine or Newspaper Index)

<http://mco.mobius.missouri.edu/filemanager/fileview/539/>

For this index, one or more 229 MARC tags were created during conversion by copying existing title field(s) from serial type records p or n. Which title fields were copied varies from cluster to cluster.

After the 229's are initially loaded, each cluster is responsible for manually entering the 229 fields.

For new serial records, type p or n, enter the following fields:

- Record has 130, copy 130 as 229.
- Record has no 130, copy 245 as 229.
- Record has 246, create 229 for each 246 as needed.
- For entries that the patron does not easily locate, an additional 229 may be created at the cataloger's discretion.

If an entry in this index has non-filing characters they are to be deleted, and the second (non-filing) indicator set to zero. New 229 tags should be entered without initial articles. Indicator values: 1st indicator blank, 2nd indicator 0 (set to zero since initial articles should be omitted).

When cataloging a serial that does not meet the serial type p or n, provide 229 access if judged appropriate. [referring to the 008 field tag]

Retain the correct serial type in the record.

1/4/01, 4/5/01, approved by MCDAC 4/6/01, 4/9/01

Arthur Coordinator Minutes in Review

Date: 1999-12-17

When saving create list search strategies, the following convention will be used: Institution [code], [individual] initials date space strategy/topic. Example: ccmgs991712 nursing videos. Line 6.

***We agreed that we all would use the format of : institution initials space year month day space subject (example: ccmgs 990922 nursing videos) . We also agreed that we could use the format that Mobius has suggested in their file examples of: ccmgs *22* 990922 nursing videos with the asterisks holding the create list file number.**

Suppress reserve bibs **in Mobius** and use 099 for call number? All incomplete or on-the-fly records need to have the bib suppressed so they won't show in the OPAC. Reserve items will still show in the reserve search, with a location of reserve. If we want to use call numbers, we can use 099. We don't have to include call number in the template. Line 10 (added in Mobius)

***We agreed that the naming codes for each college would be: wd (William Woods), wc (Westminster College), lu (Lincoln University), sc (Stephens College), cc (Columbia College), mosl (Missouri State Library)**

_Date: 2000-03-03

Order record display - Robin will send the request to III that allows the order record to display in the OPAC for 30 days from receipt. If the item is cataloged in less than 30 days, the OPAC will show both the order and item record. Line 1. **Libraries can suppress the order record as needed.**

_Date: 2000-04-07

MOBIUS Catalog Design Advisory Group had decided that no subject headings should be stripped from records. Even if they are not currently being used, the headings should remain in the record. Line 4. **All Arthur libraries continue to agree and follow this with exception of Stephens College; they are stripping heads out of the records.**

Date: 2000-05-11

Standing orders and monographic serials - Reconfirmed the decision to suppress master bib records for monographic serials. For example, the master bib for "The Reference Shelf" would be used for serial control, but suppressed from public view. For serials in general, item records should be suppressed or deleted. For example, Contemporary Authors could have a "library has" statement listing the volumes, and all item records can then be suppressed. Clean-up needs to be done as we can get to it. Line 3

Libraries will contact each other to help identify problems to be fixed. We all agreed this procedure is a must to keep the catalog clean and effective for all.

Use dates on cluster items - Do not place stickers in books that don't belong to your library. Line 4 (circulation) **Never use other libraries materials for course reserves.**

Date: 2000-08-09

A problem with filing indicators was discussed. There are many titles with initial articles that do not have the correct filing indicators (245, 440's, 740's). Jim reported that the 440s are the worst area. Also, records that begin with a, an, or the, not used as an initial article, are not being retrieved properly. An addition of the 740 with the filing indicator could be used to compensate for the stripping of the article in the search. It was decided not to add a 740 at this time. At least one cluster has chosen not to strip leading articles from the indexing, but we decided to keep this option. The MOBIUS union catalog strips leading articles. The consensus was for everyone to be responsible for correcting the wrong filing indicators in their own records, but if someone runs across an error in the meantime, to go ahead and correct it. (Finders fixers) Line 2. **It was agreed that we would not start a 246 line with "the, and, a "or any other stopwords.**

Loading (rapid update, etc.) We need to update no more than 20,000 records on the system at one time. Line 3.

If anyone wants to change item records to reflect yearly circulation statistics, it can be done through rapid update. Generate a review list of items with year-to-date circulation greater than zero. At rapid update, answer the questions about maintaining year to date, zeroing totals, and adding or replacing the figures. Again, no more than 20,000 records at a time. Line 5.

Noted that Corinne will write up the procedures for the annual circ stat change over for Arthur's procedure section.

Date: 2000-12-04

New additions and modifications to the SCAT tables. We agreed that once this table is finalized, changes would only be made once a year (after fiscal end) with everyone's approval. Line 7
(some text edited out)

Report from MCDAC. Each site is encouraged to continue cleanup of erroneous tagging, a problem especially in series headings. If a field is covered by authority control, that process is supposed to take care of bad indicators. Duplicate bibs need to be resolved at the cluster level. If records are merged, the OCLC number needs to be retained. There is no decision yet as to how to resolve cataloging errors in the central catalog. It is recommended that individuals do not add 970's to their records, but rather let the enrichment process take care of it. Line 6

It was agreed that we would not add 970's to records. We would use a 505 contents note if we felt the need as per cataloging standards. Stephens College was not in agreement with the 970's policy. It will discussed with the MCDAC representative as to the status of this issue now.

Reserve records. As a reminder, course reserve records need to include the college or university code as we agreed last December. (From December 17, 1999 minutes: "Course abbreviation and number followed by upper case institution initials in parenthesis and a second field with name of course [with initials following]. Example: ACC 240 (LU), Principles of Accounting (LU)") It was suggested we identify the instructor with the code as well, since several instructors are serving as adjuncts at more than one site. Any records that don't have items attached should be removed. Line 15

It was agreed that we need a copy of the Course Reserve Standards that we follow in the document list for Arthur. Corinne will post a copy of it.

Date: 2001-03-20

Course reserve standards

Coordinators are asked to remind their **assigned staff members** to adhere to standards. .
Adhering to the course record standards helps differentiate real records from course reserve records during authority control. (Deleted "circulation staff to try")

- a. Use CAPS for course names, faculty names, etc. in course reserve records
- b. Use CAPS for all on-the-fly items
- c. Include institution ID in parentheses
- d. [Example] William Woods' ID is (WW)
- e. ...materials without a barcode, even if it is a faculty member's personal copy must get its own bib record in CAPS
- f. Course records without items should be deleted or made inactive
- g. Item records should be deactivated when not in use. Line 2

Multiple version policy

In an attempt to stave off the ever-worsening situation of duplicate records in the database due to multiple serial record versions, the Arthur coordinators propose the following guidelines, pending the approval of the Arthur catalogers.

- a. All material formats should be attached to a single bib record, preferably the paper record.
- b. Attach holdings to all appropriate OCLC records, regardless of format but download only one record (the paper version) into the database. Line 8

The above point will be a topic of discussion at the next meeting. It was pointed out that with the cataloging standards changing, the combining of print and microform will be impossible to manage. Records will need to be identified and placed back into their appropriate format. It was suggested that Arthur begin the process of moving back to cataloging records in print and microform as separate records.

Date: 2001-07-23

Public note in webpac—Jim indicated that since there are so few item records with notes added to them, adding the public note to the webpac would display in an annoying manner. The group decided against it. Line 6

Date: 2003-05-07

My Millennium, the group agreed to it with the restriction to not allow patrons to edit their own records. (a call was opened to the help desk). Every institution will decided on the number of saved preferred searches, i.e. students vs. faculty.

Check in message, the cluster agreed to add/use the variable code (m) to check in records to alert staff to any special instructions.

Status (f) in item records will be used for new items that an institution will not allow for requesting for a certain period of time **[30 days]**, and then you may create a list for rapid update. Line 3,4,5 **Items with status (f) can be requested thru Arthur and Mobius. As per the**

agreement libraries can retain their new books for 30 days and cancel holds for such during that timeframe. When 30 days is past the books need to be available for access in Arthur libraries and Mobius. Status will need to be changed to available or at least be accepting holds. It will be noted that status (f) does not stop a hold from being placed. It will be noted that variation exists in the cluster on this. Westminster uses the status (f) but allows anyone to place holds on the items at anytime. Lincoln retains the books for 30 days for their patrons to have first access, then the status is changed to available.

Date: 2004-10-12

Codes maintenance in Arthur, responsibility for

Agreed maintenance of language codes and other MARC/AACR2/etc. codes should be handled by the Arthur Technical Services Committee. (no line number, middle second page location)

Date: 2007-04-03

To be submitted to the directors for policy approval for the Arthur Technical Service Committee Head: “

We have new people who are in Arthur at various times. It would seem needful to give those folks time to adjust and learn the job as well as all the technical service info. If a person has never been a Technical Service committee member, then we suggest that they are given 2 years development time before asked to be the Head of the Technical Service Committee. If a person has been a Technical Service committee member for the III system in another area then the time would not be needed via experience. It was also agreed that a person would be allowed at least 2 years passing before the Head of the Committee would be given to them again in the situation of new individuals lacking training.

Arthur Technical Service Committee

Date: 2001-04-26

We will use the Merlin standards unless the cluster has made exceptions. Those exceptions will be posted on the Mobius web page. Links will be made to the Merlin standards where they are identical.

Date: 2002-11-15

The 590 notes were discussed. The format should display as the holding library's **name** followed by a colon and then the note. If another library finds notes in the 500's that should be in the 590's and it is clear to whom they belong, they can correct the note or notify the other library. **The name of the college needs to be spelled out as not everyone looking at the record will know what initials represents what college.**

Date: 2004-11-04

We discussed the MARC codes... country codes, ... language codes... update the MARC validity table on a regular basis. ...This is why validated bib records are showing up with a lot of "red" subfields.

Date: 2006-08-10

Consolidation of formats on a single bibliographic record.

In general, Arthur libraries have been using a single bibliographic record for all formats (except electronic) for serial records. The decision was based on ease for the user. We decided to carry on with that policy, even though a future implementation of FRBR (Functional Requirements for Bibliographic Records) may make this undesirable... Right now the practice makes the website cleaner for users. **This subject has been postponed for the next meeting where it will be a main focus of discussion.**

MARC Coding in Millennium

We looked at some bibliographic records and noticed that some legitimate bibliographic fields were coded in red. The load table and index table looked fine, but the missing fields were not in the Format Validity Table (available through Database Options). The Cluster is responsible for updating the Country Codes and Language Codes, ... *the Cluster is responsible for the Format Validity Table.* . The source for the language and country codes is Library of Congress MARC21 Bibliographic formats - code changes.

It was noted that the rotational schedule for responsibility of updates is on the Arthur Technical Services page of the MCO website. **These assignments need to be reported annually, perhaps the Spring meeting? The individual tracking it needs to report that the responsibilities are being taken care of as needed.**

Item Record Suppression for Multi-Volume Sets

This point was mentioned in the Arthur Coordinator notes earlier as a point for discussion. Here's the results of the later discussion as agreed:

It was agreed that multi-volume items that do not circulate (e.g., bound periodicals) should be suppressed and a check-in record with a library holdings statement and call number, if applicable, should be used instead. The check-in record makes a cleaner display in the WebPAC. There was discussion of codes used for suppression in item and bib records. It was agreed item record suppression code "n" would be used as the temporary suppression code and item suppression code "s" would be used as the permanent suppression code when items should not

appear in either MOBIUS or Arthur. Item suppression code "1" is used for reserve items. Similar codes should be used in BCode3 of the bibliographic record. Code "d" for delete in bibliographic records is seldom used by Arthur members.

Icode2 (Suppression codes)

Display Loc/Cen –

No cen/Dis Loc z

No cen/sup loc s

Supp Central l

Supp Loc/Cen n

Supp Loc/Dis C q

This has changed. We use only:

No cen/sup loc s

No cen/dis loc z

Dis loc/cen -

Supp Loc/Dis C q

Comments: Definition of ‘n’. Suppressed from display of the local catalog and sent to the central server but suppressed from displaying in the catalog. Use s. So why use “n” at all? Other codes are for Mobius use or obsolete codes.

Concerning the use of “q”: (From Mobius): The only suppression codes on INN-Reach itself are bibliographic (BCODE3), since bibliographic records are what drive INN-Reach. Therefore, there aren't any actual suppression codes on INN-Reach for items, orders, checkins, etc., and 'q' is not technically 'mapped'.

However, it is the suppression codes in items, orders, checkins, etc. on the local server (Arthur) that 'notifies' INN-Reach how to handle the display of the attached records, therefore the reverse suppression code 'q' works for items and serials contributed by Arthur.

Please feel free to add to the list. Meeting notes and policies are on :

<http://mco.mobius.missouri.edu/home/clusters/>

<http://mco.mobius.missouri.edu/article/archive/346/>

<http://mco.mobius.missouri.edu/article/archive/194/>

<http://mco.mobius.missouri.edu/filemanager/list/232/>

<http://mco.mobius.missouri.edu/filemanager/list/36/>

