

MOBIUS Coordinators Advisory Group (MCAG)

Minutes of meeting held via CENTRA

August 7, 2007

Present: Richard Amelung (SLU), Christopher Brite (Towers), Corinne Caputo (Arthur), Eileen Condon (Bridges), Lynne Edgar (MCO), Beth Fisher (MCO), Judy Fox (WashU), Christopher Gould (MCO), Steve Jamieson (Bridges), Pat Logsdon (WashU), Les Lynam (Quest), Judy Maseles (Merlin), Corky McCormack (Swan), Jean Parker (SLU), M.J. Poehler (Wilo), Kathy Schlump, Chair (Archway), Mary Sims (Lance), and Karl Suhr (Galahad), Mark Wahrenbrock (MCO), Kirsten Young-Abotsi, (Archway)

The agenda was distributed via email, and there were no items added.

The minutes from the March 13, 2007, meeting had been previously approved via email and have been posted on the MCO website.

AGENCY SOFTWARE UPDATE

Beth Fisher presented a chronology of events relevant to the status of Agency software implementation. Highlights from the chronology follow. 11/18/05: MOBIUS Executive Committee (EC) voted to ask MCO to seek a grant for the purchase of Agency software at \$42,500. 8/4/06: Status of Agency is discussed at the EC meeting; following the EC meeting of 8/4, in Fall, 2006, an LSTA grant proposal was submitted to the Missouri State Library. Verification of LSTA funding was received in spring 2007 and a purchase order was placed with III. MCO began meeting regularly with Innovative. Regular meetings with Innovative have generated information about the impact of Agency implementation on the union catalog and the clusters; MCO has passed the information along to the EC and advisory committees. On June 20, 2007, MCO distributed a document to advisory committees describing the functions of Agency, detailing an implementation schedule, and outlining issues that need to be addressed with the implementation of Agency in the MOBIUS setting.

Christopher Gould contributed additional information about Agency implementation. Currently III continues to work on Agency profiling for MOBIUS. Innovative will begin testing the conversion of local records to Agency later in August; also, new records created will be set up for agency status. Action taken toward Agency to this point is reversible. Christopher went on to say that local system conversion for Agency implementation would be a point of no-return on the Agency project.

A detailed discussion followed on how the 856 in the bib record will function under Agency software. As described by Christopher, many MOBIUS libraries store URLs to electronic resources in the 856 field of the bib record. Innovative has stated that 856 fields in local bib records will only display on INN-Reach for the Master Bib record. 856 links will not appear in the holdings display on the MOBIUS Catalog, unless they are

stored in local attached (checkin or item) records which are contributed to MOBIUS. Any 856 link stored in a local attached record will appear in the MOBIUS holdings display as belonging to the library (Agency) whose location code appears in the local attached record. As an example, an 856 field stored in an attached record for MU Law will appear in the MOBIUS catalog as being held by MU Law. However an 856 field for MU Law that is stored in a bib record will not appear in the MOBIUS catalog, unless the bib in question is the INN-Reach Master bib record.

Via the IUG listserv, Christopher sought input from other libraries on the 856 functioning under Agency. There were no relevant responses.

There was discussion of the approach originally recommended by MCO: For each bib record holding a URL stored in the 856, insert 856 fields into attached records (item or checkin), so that in the union catalog, the electronic resource links are listed under the individual agency (library). Issues: there is currently no automated way to accomplish this; the number of item or checkin records that would need to be created is unknown, but can be assumed to be huge; the impact of this load on local servers is unknown; libraries would need to maintain the URLs in two places instead of one; III URL-checker is not relevant to 856s stored in attached records.

Innovative has been asked to provide a proposal for automating the copying of 856s from bibs to attached records. Although Innovative has worked on this, there is no proposed plan at this time.

Beth Fisher asked the members of MCAG to consider that it likely will not be possible to get Agency to function like we want it to vis-à-vis electronic resources within the originally proposed implementation timeline. Postponing III's implementation timeline is a possibility. Beth noted that if we postpone III's timeline, then the implementation process could not be started up again until at least summer 2008. By that time the grant funding period will have ended, thus putting the grant-funding of Agency software into question.

The question was raised as to the possibility of implementing Agency without the local 856's displaying as we would wish them to. It was confirmed by Christopher that the other benefits of Agency (display of holdings by library rather than by cluster; in patron-requesting, use of home agency (library) rather than use of cluster; reporting of Inn-Reach circulation statistics by agency, rather than by cluster) will be working fine, regardless of the handling of 856s.

Further discussion indicated that in the master-bib, it is possible to suppress the display of the 856. It was suggested that we should consider letting only the freely available electronic resources display in INN-Reach, via use of the suppression code. This would require that the master-bib record have the freely-available link.

Christopher commented that any fix to the 856- electronic resources display issue will have to go through Innovative's product development process.

Beth announced that MCO will initiate a listserv specifically for discussion of INN-Reach Agency implementation issues, to be called MOB-AGENCY. Members of MAAC, MCDAC, MCMAC, MERAC, MCAG, and the MCO staff will be enrolled in the MOB-AGENCY listserv. MCAG members should expect to see before the end of the day: a “Welcome to the List” announcement; an introductory summary of the current status of MOBIUS’ INN-Reach Agency implementation; and a bulleted listing of the advantages and disadvantages of agency implementation, to be prepared and posted by Christopher Gould.

By consensus, MCAG members agreed to defer any action or recommendation on the implementation of Agency software, deciding to utilize the MOB-AGENCY discussion, and input from clusters, to inform any future committee decisions.

MCAG SURVEY PRESENTATION TO MOBIUS COUNCIL

Beth Fisher has asked MCAG for a presentation of the recently-completed MCAG Software Survey to the MOBIUS Council meeting to be held September 7, 2007. This meeting will address legislative issues. MCO will be preparing to submit a request for funding from the legislature; priorities for use of funds that might be forthcoming are still quite open. A discussion among MOBIUS membership regarding legislative funding priorities is needed. Possible projects to consider for funding include: equalizing software use across the membership; implementing search overlays such as Encore or WorldCat Local; a system for documenting outcome metrics in the MOBIUS consortium. The presentation of the MCAG survey results will serve as a starting point for discussion. Eileen Condon has agreed to present the survey results to the Council.

Eileen reminded MCAG that this committee originally planned to repeat the survey this fall, and asked if that is still the intent of the committee. By consensus, it was decided to defer any action on repeating the survey until after the Council discussion, with the hope that the discussion will inform any possible changes in the design of the survey.

It was noted that the MCAG survey has not yet been posted on the MOBIUS web-site. MCAG can proceed with posting the results.

MCAG’s CHARGE and HOW TO FULFILL IT

A copy of the committee’s charge was distributed to members via e-mail prior to the meeting. The charge has been discussed several times in the past. The question was posed, given the charge for reviewing “products used with the CLP that enhance usability and performance [and] ...recommending system enhancements that promote the goals of the CLP”, what is the role of MCAG in the evaluation of Encore and WorldCat Local? Discussion followed.

Citing Agency implementation as an example, some members felt that MCO had not adequately kept MCAG informed such that the committee’s charge could be carried out. Although the charge to review and recommend software is clear, any role that MCAG is

to play in implementation is less clear. Christopher pointed out that documentation re: Agency implementation was distributed to MCAG at the time it went out to other committees; also, MCO can try to keep committees better informed through more communication.

Kathy Schlump reported on her query to Julia Schneider, Chair of the MOBIUS Executive Committee, as to whether MCAG would be asked to participate in evaluating Encore and WorldCat Local. Julia replied that while the Executive Committee will not ask this of MCAG, the committee can decide to do so on our own. Discussion followed. The consensus was to wait for the outcome of the discussion at the September Council meeting. If Encore and/or WorldCat Local are under consideration by the Council, MCAG will notify the Council that the committee will review and evaluate these products. Kathy Schlump will ask that Encore and WorldCat review be added to the Council's agenda for Sept. 9.

NEW CHAIR ROTATION

Kathy Schlump raised the following points. Chair rotation for MCAG is by cluster alphabetically; next after Archway is Arthur. The representative from Arthur, Corrine Caputo, is new to the committee. Given that MCAG meets only twice a year, does a 2-year term for chair make more sense? It is quite possible that someone new to the committee will become chair in any given year. Discussion followed.

The committee will continue the status quo regarding rotation and length of term of the committee chair. Corrine Caputo will serve as MCAG chair in 2008. As a means of clarifying MCAG conventions on membership terms, as well as chair and chair-in-waiting status, Corrine and Kathy will create a document outlining these practices. The document will be posted to the MCAG discussion list, and should be shared with clusters. The document will be an informal description of MCAG conventions.

NEXT MEETING

The committee chose March 18, 2008, as the date of its next meeting. Kathy Schlump will book a room at MCO for the meeting. As the meeting date approaches and the agenda takes shape, the committee will discuss via e-mail whether to meet via e-conference or at MCO in Columbia.

Respectfully submitted,

M. J. Poehler, WILO Representative to MCAG
Library Director
Kansas City Art Institute