

+MOBIUS Catalog Design Advisory Committee
March 4, 2005
10 A.M.

Attending: Gary Harris, Jim Dutton (MCO); Kirstin Young, Jean Rose (Archway); Nason Throgmorton (Arthur); Kathy Nystrom, Denise Pakala (Bridges); Melissa Muth (Galahad); Stephen Wynn (Lance); Kathleen Schweitzberger, Sherry Mahnken (MERLIN); Michael Washburn (MRRL); Marian Davis (Qwest); Donna Bacon (SGCL); Gwen Gilpin, Phyllis Holzenberg (Swan); Christopher Brite (Towers); Mark Scharff, Pat Logsdon (Washington); Cheryl Couch-Thomas (WILO)

1. **Minutes:** The minutes from the meeting on November 5, 2004 were approved as written.
2. **MOBIUS Update**
 - a. **New libraries:** The Assemblies of God Theological Seminary, a member of the Swan cluster, went live in January. The Missouri River Regional Library (MRRL) will receive training next week and it is expected to go live mid-March.
 - b. **Training:** MCO is doing a great deal of training around Missouri. MCO received an LSTA grant to provide, along with MLNC, Connexion/Millennium training. As of today MCO staff have done 5 workshops. There were some problems finding a training place in Kansas City for two successive days so they only did Connexion training; 6-8 more workshops are planned/scheduled around the state. MCO is training in authority control and serials. They are scheduling May-June now.
 - c. **Check-in records:** MCO discovered that changes in check-in records at the cluster level are not being loaded in MOBIUS. III has developed a patch and MCO will be updating records. There was an email about this, which Gary will re-send to MCDAC.
 - d. **MRRL:** MRRL records may have some errors due to migration to III but these will be fixed. For now there is no need to report these to MCO.
3. **INN-Reach/Innopac Enhancements Requests**
 - a. **Deadline:** MOBIUS Advisory Committee chairs have until April 1 to send in INN-Reach enhancement requests. These should be sent to Gary Harris.
 - b. **Innopac enhancements:** Monday, March 7 is the last day for IUG/Innopac request. There was a question about whether any of us had submitted a request re the 856. Jim Dutton doesn't think so unless Mary Ann Mercante did. It would be okay for each cluster to send in the same request. Jim will send out the wording for everyone to use and submit by Monday.
 - c. **Enhancement process:** Gary Harris explained the past process and mentioned that it has changed this year. Gary is no longer the national coordinator for INN-Reach enhancements but is the MOBIUS coordinator. He sent a memo to everyone earlier explaining the deadline and process for this year during which no vote will occur at the IUG meeting. Instead the requests will be discussed but the vote will be after the conference with a ballot in late May. The MOBIUS Access Advisory committee moved up its meeting to have a discussion in April of local enhancement requests.
 - d. **Possible enhancement requests:**
 - i. **My reading history:** Washington University has discovered that MOBIUS requests are not included in My Reading History on clusters' catalogs. Patrons want this included and Washington University reported it to III who is looking into it. III suggested that we submit an enhancement request. MCDAC approved this request and Gary will submit it. Washington University has set this option so that patrons have to opt in.

- ii. **Volume ordering:** Holdings are not being re-ordered in MOBIUS (see Newsweek example in MOBIUS; MERLIN holdings). If gaps are filled in, this can create a problem with interpreting holdings accurately. The committee decided there should this be an enhancement request. Denise will draft the wording and send it to Gary to submit.
 - iii. **'Search for available only':** Some clusters have this turned on while others don't. Others have tried it and then turned it off because the limit doesn't work as well as they had hoped. MCDAC decided to hold off sending a request to enable this in INN-Reach since the majority of clusters are still not using it locally. MERLIN turned it on and likes it; Truman has not turned it on. We would need to write the enhancement so that the request button doesn't show if no holdings are requestable but if some are requestable the button will display. Concerns were raised about how patrons might interpret this. Also, there are questions about what happens when a desired item is checked out. If the system determines an item is requestable solely based on its status (rather than status plus circulation status), then it can be confusing to the patrons. Another question was raised: what does the patron see when there is not a Requestable item? MERLIN has no text display. If we decided to request an enhancement, we should suggest that there be optional text, for example, if nothing is available, the patron would see, "This item is not requestable." Mark suggested the text option might be "library use only" and not a link. Right now if nothing is requestable the patron sees the message "Sorry, no copies available for request" when the patron attempts to request an item. MERLIN has found it saves patron only one click. MCDAC decided after much discussion not to submit an enhancement request.
 - iv. **856/956:** We are asking III to implement the 956 field in the Innopac. The 956 tag is now available in MARC and OCLC. If this is implemented in the Innopac, the 956 would be a link for subscription and would be blocked from going up to INN-Reach. The 856 field would be used only for public/free access sites.
4. **ID in MOBIUS:** Sherry Mahnken and Kathleen Schweitzberger described what MERLIN has done in MERLIN to reflect the switch away from using the SSN. MOBIUS still only mentions SSN as an option. MERLIN would like to suggest a hot link with "enter your id number" and then take the user to a separate page explaining what number to enter for a particular cluster or library. Another suggestion is to take the user to a FAQ page. Janine has talked to III to get more information about our options. This seems to be a problem only within MERLIN, so there is no need for MCDAC to take action on this. Janine will work with MERLIN on this.

5. Strategic Initiatives and Priorities

- a. **Standards:** MCDAC is concerned about the lack of any mention of standards related to cataloging in the agreement signed by Cooperating Partners. We also perhaps need to revisit the Memorandum of Understanding. This has been something of an issue when libraries have joined an existing cluster post-implementation. Within the cluster, there are some mechanisms to address issues of standards (through various cleanup projects); there is less opportunity with Cooperating Partners. George Rickerson would like more, firm examples of issues and problems that we see rather than relying on anecdotal evidence. George and Gary say we need a lot more data of what we have seen that will support our ideas about the future. It was pointed out that since we are looking to the future, hoping to waylay a problem before it gets out of hand, catastrophic examples are difficult to document. MCDAC is considering future members and potential impact on the quality of the MOBIUS catalog, the impact on individual

clusters and impact on MOBIUS collectively. It seems only fair that libraries considering joining MOBIUS need to know exactly what will be expected of them. So, we need to develop a statement. QWEST suggested that we draft a paragraph on cataloging and propose it be added to the Cooperating Partners Policy. Right now only circulation is covered. MCDAC decided that we need a subcommittee to work on this draft as well as issues of standards relating to full MOBIUS members. Donna Bacon, Kathy Nystrom and Gwen Gilpin volunteered for this subcommittee. They will report back to MCDAC at the next meeting with recommendations.

- b. **MCDAC membership for new members:** There was a question of how future votes may be affected if a large number of cooperating partners join and each have a single vote compared to one vote for a cluster of libraries. Sarah Parker has convened a group to assess interest of the public libraries to join MOBIUS. Daniel Boone Regional and Mid-Continent PL (both SIRSI catalogs) don't want to change ILS but are still interested in participating in INN-Reach. III has worked on this but we don't like the method that III has used (only updates 1 every 24 hours rather than immediate update). Jerry Klein wants to work on this to help us achieve optimal results. This will probably take several years to develop. At this time these are the only two public libraries that have expressed interest in becoming cooperating partners and thus the balance of votes is not an issue in the near future.
- c. **Global Training Needs:** Kathy Nystrom introduced this topic. Might it not be a good idea for MCO to use skills of individuals in clusters to help with training? MOBIUS members also need to do more sharing of what people are learning about applications with other clusters. An example is stylesheets/scripting. There are MOBIUS librarians who would be able to share their knowledge of stylesheets/scripting, but we need a mechanism to promote such sharing. This could help MCO staff with some of the burden. There was discussion of also using the MOBIUS list for more discussion, questions, etc. Another example: we are interested in learning about SGCL's ongoing experiences as an III Beta site (subject to the legal issues of what Donna can share with us).

- 6. **229 filing indicator:** The 229 2nd indicator filing indicator problem has been resolved. Example: Die Naturwissenschaften: now appears to be indexing correctly, ignoring the initial article in the 229 (periodical) index. If a cluster wants the 2nd indicator to work as a filing indicator and it is not set up now for the cluster, you can ask MCO to set this up. Be aware that there are some periodical titles that are coded incorrectly and need to be fixed in the cluster catalog so the central catalog indexes them correctly.
- 7. **Online Tutorials on how to use the Catalog:** Arthur has been thinking about developing tutorials for using the catalog and wondered if MCDAC should do something similar for MOBIUS. At one point, Bonnie Sanguinet was working on FAQs for the Central Catalog. Archway will check on the status of these. Swan has a draft of an online tutorial that they can share. MCO demonstrated SEMO's SearchPath module 3. Western Michigan University's tutorial using SearchPath is at <http://www.wmich.edu/library/searchpath/>. Another example is University of Texas at Austin's tutorial (<http://www.lib.utexas.edu/ugl/usingutnetcat/>). MCO could place links to these and any other tutorials we think useful, particularly ones from MOBIUS libraries, on the MCO website. Send them to the MCO Help Desk (Jim will ask them to set this up under the Training tab on the MCO website and will alert them about receiving these). Libraries/clusters may want theirs customized but these would be starting points. At this point there is no plan to create tutorials for MOBIUS, just the aforementioned FAQs.

8. **Backstage (new owner of MARS processing):** Some libraries thought there was a much longer turnaround time for authority processing. MERLIN's was shorter. We will continue to monitor. By and large, the transition from OCLC to Backstage seems to be going okay.
9. **Next meeting:** July 8 -- Archway, Galahad, LANCE, MERLIN, Towers, WILO reps need to be replaced/reappointed. There was discussion on moving the meeting since that Monday is July 4. We decided to keep the date as July 8.
10. **Cataloging error report form:** Someone reported slow response time in getting errors corrected. Jim pointed out that maybe we might want to share some errors with all the clusters at once when they affect multiple records and multiple clusters. Jim will create a new list for this.
11. **Duplicate TOCs:** There are a number of records where the TOC is repeated. MCO is aware of the problem but there isn't any way to identify the records with this error. They think it may be one particular batch of records where the TOC's were loaded twice. It doesn't appear to be an ongoing problem.