

MOBIUS Catalog Design Advisory Committee

Meeting Minutes

April 19, 2002

Members present: Michelle Turvey (SWAN), Phyllis Holzenberg (SWAN alternate), Karen A. Fiegenbaum (WILO), Rhonda Whithaus (MERLIN), Fran Stumpf (Archway), Georgia Baskett (Arthur for Inas El-Sayed), Mary Ann Mercante (MCDAC chair, Bridges), Pat Teter (LANCE), Denise Pakala (Bridges alternate), Carol Bennett (Archway alternate), Nancy Stancel (MERLIN alternate), Robin Kespohl (MCO), Mark Scharff (Wash U.), Jim Dutton (MCO).

The minutes from the January 25, 2002 meeting were approved as amended. Amendments included: 1) correction of the file name and 2) under the heading "Removal of Limit by Bib Level for Serials", change "material format box" to "publication type box." Mary Ann will make the changes to the minutes.

Two proposals were made for additional links on the Governance Tab, MCDAC section. The first was adding a Discussion Items section for draft documents to be used in future meetings. Maintenance of this section would be the responsibility of the MCDAC chair. A second suggestion was adding a link to the list of MCDAC members similar to the link under representatives for MERAC. Both additions were approved and will be added.

MOBIUS Update

Galahad and Quest are up on INN-Reach.

MOBIUS now has 15,778,576 volumes.

Galahad and Quest records are back from TOC enrichment and authority control. Authority workshops are to be scheduled shortly.

Towers is in the TestPac stage.

Automatic Authority Control has been extensively tested by MERLIN and will be turned on for other clusters upon request.

The Missouri State Library will begin their implementation without state funds and will be joining Arthur with a kickoff for April 25, 2002.

The 3rd annual MOBIUS Users Meeting is to be held June 6, 2002 in Jefferson City at the Ramada Inn. Registration will open April 22, 2002. In conjunction with the meeting, MCO will offer three one-day training sessions on June 7, 2002 at the MOBIUS consortium office in Columbia. There is no charge for the sessions, however seating is limited. The three sessions are as follows: Millennium Serials (MCO), Cataloging (MCO), OCLC FirstSearch using the administrative module (MLNC).

The IUG conference is April 28-April 30, 2002. MCO will be sending 8 people.

Release 2002 is available April 22, 2002. MCO will delay implementation for approximately one month until the initial bugs are worked out.

MCDAC Elections

Under the Governance Tab on the MOBIUS homepage, is the election rotation for MCDAC. Even year elections are to be held for the following clusters: Arthur, Quest, SWAN, Bridges, Wash U. Individuals already serving on MCDAC may be re-appointed. If a new cluster representative is chosen, the individual's first MCDAC meeting will be in July.

Update on Action Items from Previous Meetings

Clickable location codes: Hardy will work on in June

Export display: The ISSN has been added.

Limit by bib lvl for serials: A call was opened with III and the option to limit by serial/journal was added. Now the limiting options under Publication Type read: any, serial/journal, non-serial.

Status on journal availability and language changes: The status of "unavailable" can be changed to whatever the committee decides. The phrases "local use only" and "not requestable" were suggested as replacements. Three clusters voted for "local use only" while five clusters voted for "not requestable." A call will be opened with III to change "unavailable" to "not requestable" after May 15, 2002. MCDAC will re-vote on the issue again at the July meeting to see if the change is acceptable or if it needs to be reworded.

At an earlier meeting, MERLIN had expressed an interest in seeing whether the phrase "link to web version" could be changed to "May be available locally, check local catalog" or a similar phrase. MCO can make this change once the committee agrees on wording. After much discussion, the phrase "Click 'Display Holdings' for additional links" was agreed upon. The phrase for the link below the checkin box, "Display holdings of MOBIUS Libraries" cannot be altered.

Authority Load for INN-Reach

III has the work order to create load profiles for authority indexing so INN-Reach will be able to handle authority loads in the future. If the increase in the MOBIUS budget goes through, the money is built into Robin's budget for the project. It is also possible to export Washington University's authority file for unique headings not included in the WLN/OCLC authorities from other MOBIUS libraries.

MERLIN met with MARS representatives and the entire MERLIN authority file will be re-sent to WLN/OCLC for processing to correct an earlier processing error.

Automatic Authority Control Processing (AACP)

AACP will significantly reduce the number of significant change reports if a cluster has AACP turned on. Changes will be made to the authority records automatically and changes to the corresponding access points in the bibliographic records will be made overnight. AACP means that one will no longer need to export each individual authority record found on significant change reports. However, if an old form of an access point is not in a 4XX field, an exact match will not occur and the heading will appear in a near match report.

AACP can be turned on at any time for interested clusters.

AACP can handle significant change reports retrospectively. Robin has electronic copies of the error reports that can be run against the master authority file again.

OCLC is also working on a program similar to AACP for free-floating subject headings.

INN-Reach Enhancement Requests

Clusters voted on catalog enhancements from IUG. The results are as follows:

Category 1 (Top Choices)

Request #27 to establish a Call Number index based on call number subfields in institution (i.e. item) records.

Request #26 to differentiate and indicate display of the URL – for bibliographic record vs. institution record—based on indicator value in 856 field. Public domain or consortium purchases could be tagged for display in the bib record. Institutional purchases (or proprietary resources) could be displayed in the holdings area (the institution records)

Category 2 (Nice, But Not Essential)

Request #44 to develop a mapping for “material type” in local Innopac systems to a central value on the INN-Reach system so users can reliably limit searches by material type regardless of differences in local system mapping.

Request #45 to provide the ability for local patrons to view local check-in records from within an INN-Reach PAC by linking back to a local Innopac

Request #46 to add a button so that a patron can remain in INN-Reach if they have tried to transfer to the Union Catalog a search from a local system record that has been suppressed from the central catalog, though not from the local one. Currently the only option is to “Return home” to the local catalog.

Category 3 (No Interest)

Request #14 to create a new Bcode 3 value to display a message for proprietary electronic resources.

Request#18 to display the load date and last update date of the local bib record in staff mode of the central OPAC display of a bib record. (NOTE: staff mode only displays in the TELNET view of the Union Catalog)

Thanks to Mark for recording votes.

856 \$z and \$u Display

At present, 856 \$z only displays in MOBIUS as per an earlier MCDAC meeting. The decision was revisited with 5 clusters voting for 856 \$u and \$z to display, 3 clusters for 856 \$z only, and one abstention. MCDAC will go with displaying \$z and \$u from the 856 keeping the option to revisit the issue open.

In order to take advantage of a patch correcting display problems with the 856 field, MCO will begin re-loading records with 856 fields shortly.

Robin also has an enhancement proposal in the works to remove the need for a decision of where the 856 will display from (bibliographic record, bibliographic record and checkin record, checkin record only).

Marcive Proposal

Note, the suggested Marcive proposal is only useful if 856 \$z displays.

Marcive will add a subfield z 'Freely available online' for federal documents into existing 856 tags for all Marcive loads after June 1, 2002.

Following the first Marcive load MCO will, on a one-time basis, insert the same subfield z into 856 tags not already containing this text for all federal documents. This will be done at the cluster level.

Following the first Marcive load catalogers in MOBIUS libraries will add the same subfield z to the bibliographic records for any new federal documents they catalog.

The Marcive proposal was voted on with 8 clusters voting to affirm the proposal. On a related note, MCO on a one-time basis, could add subfield z 'Freely available online' to Missouri documents and UN documents to clusters wishing to have this done. The Missouri State Library will be adding their documents to the MOBIUS catalog shortly.

Online Form to Report Errors

Robin suggested sending a form for table of contents errors to MCDAC members for correction. The draft of the MOBIUS problem report form was reviewed. It was suggested the bullets for authority errors and CIP records be removed. This leaves misspellings and typos that affect a search and incorrect filing indicators that affect a search on the form.

The question of how to identify who owns the master record belongs to was addressed. Owning information can often be found in the 049, 040, or 001 fields. The logistics of reporting such errors was also addressed and a pilot study suggested as a possible avenue. Not having any firm solutions for the problem of who should receive the errors, MCDAC will table the issue and will continue the discussion on possible solutions. One option is to have one person from each cluster be the contact person for the cluster for corrections.

Other Business

The next meeting is scheduled for July 12, 2002.