

MERLIN Quality Control Committee
Minutes from meeting of February 27, 2002

PRESENT: Nancy Stancel (UMKC Law), Richard Amelung (SLU Law), Mary Aycock (UMR), Alla Barabtarlo (MU Ellis), Ann Dykas (UMKC), Norma Fair (MU Ellis), Wendy Fritzel (MU HSL), Christopher Gould (MCO), Gary Harris (MCO), Ting James (SLU Law), Robin Kespohl (MCO), Jessica Longaker (MU Law), David Owens (UMSL), Carol Riley (UMKC), Cindy Shearrer (MU Law), Margaret Smith (SLU Law), Maggie Trish (UMR), Anna Zaidman (SLU Pius).

1. Announcements & Introductions:

- Introductions were made, no announcements.

2. Minutes from September 19, 2002 meeting:

- No additions or corrections. D. Owens will post the final version to the web.
- R. Kespohl demonstrated the basic procedure for posting. A written set of instructions was sent to the list on 3/4/02.

3. LSO update:

G. Harris:

- The reindexing has been completed. G. Harris and R. Kespohl tested against the recommended changes, and issues were posted to the list. Unless notified of further issues, he will sign off on the reindexing on Friday, February 22nd. N. Fair asked if the label on the ARN display had been corrected, or would be. After displaying for the group, it was determined that the field name, not the index, was in question. It displays in the index as ARN, but as the field name is LCCN in the recommendations. A. Zaidman asked if the 4xx subfield 9, which is not visible in the index rules, is working, and if it is protected from overlay. The work order for this was sent in at the same time as the reindexing work order. G. Harris said that this issue was sent separately to the help desk, and not bundled in with the reindexing order. Additionally, several people noted that MARC21 has no non-filing indicators in the authority 4xx or 5xx fields, and that we need to ask Kathleen to update the load table labels to conform to current standards.

4. WLN File Segmentation:

C. Gould:

- We are ready to start Backfile 4, which will consist of records with a catalog date of Feb. 2000-Jul. 2000 if we choose to stick with sending 6 mos. at a time. He will run check to see if the file size is small enough to send a full year.

- In reference to the 130/630 problem, C. Gould said that when we sent in the new profile to WLN, we chose the option for file segmentation that we thought we had been receiving. WLN has been instructed to provide 130/630's in the Subject file segment. In terms of damage control from the problems with Backfile 3, C. Gould said we can receive a new load with these records. A. Zaidman asked if we could review the records prior to loading, and was told that was possible. C. Gould will announce on the list when the files are available for Anna's review.
- MQCC elected to continue receiving files of authority records using the Custom File Segmentation. Christopher was asked to specify that where WLN refers to "130/X30,440" he specify the breakdown as "130/130,730,830,440" (NOT 630).

4. AACP:

C. Gould:

- Innovative says they have fixed the problems with the product, in reference specifically to headings being updated to blank headings, or having one heading changed in a bib. record that has multiple occurrences of the heading. As to the issue where a section of a heading report was copied into a bib. and item., Innovative believes that was user error. The name-title issue that M. Scharff at Wash. U. brought up is still in programming being fixed. We need this fix finished before we turn the product back on.
- The question arose of where we are in the 14 steps program, to which C. Gould replied that we are not on any particular step, but in the vicinity of steps 12 and 13. A. Zaidman asked what would be next, once AACP is turned on. C. Gould replied that a list of authority records would be created and run through AACP, then the electronic significant change backfiles would be loaded. He was then asked how far back we could get the reports in electronic form, and he said he'd find out and post the result to the list. Anything not loaded electronically would have to be handled manually.

5. Proposal for Inn-Reach Authorities from MCDAC:

R. Kespohl:

- Innovative has indicated that they are working to provide an option for loading an authority file specifically for the INN-Reach system. R. Kespohl brought this up with MCDAC, where they discussed the concept of loading a static authority file, to be refreshed once a year. Ideas as to how the file could be composed varied, from using a compilation created by WLN of any MOBIUS authority files they hold, to using MERLINs authority file, to adding Wash. U. to the mix. MCDAC is investigating the costs involved in different options and what effect the static file might have
- A. Zaidman brought up the need to communicate the current state of affairs with MERLIN bibliographic headings and the MERLIN authority file, so that MCDAC can make an informed decision in terms of using MERLINs authority file. R.

Kespohl brought up the existing problem of references in MOBIUS that would lead nowhere, and pass-through searches that wouldn't work. Concerns were also expressed that outdated headings would remain in the file for up to a year and would not match the updated bib. records.

- N. Fair asked what MCDAC wants at this point from MQCC. R. Kespohl said they are considering what to do. They will go ahead and authorize loading the software, since Innovative is offering it free of charge. The information we have provided will help them make their decision. However, the topic may be moot without funding; at any rate a decision will not have to be made for several months, as there is no money for this currently. N. Stancel is to take a statement to the next MCDAC meeting that MERLIN is dis-synchronized in relations to bibs and authorities.

6. IEEE Journals and Conferences:

N. Fair:

- There had been a general question as to whether the journals and/or conferences were being linked. M. Trish commented that UMR had linked almost all of the journals with their holding symbol, and are linking the conferences as the print versions arrive. N. Fair brought up the problem of linking the conferences, which are mostly on serial records in MERLIN, but treated as monographs on IEEExplore. She brought up the example of the ICASSP records, (ex. OCLC #40157209) showing the way UMR had linked them with a search strategy, versus inputting links for the individual years. Making it clear that the user must enter the search strategy at the IEEE website is an issue, as is record length if individual links are input for each year. N. Stancel was asked to pass this example on to MRSC to explain the options and issues, and see what they prefer. A. Zaidman pointed out that this is a UM, rather than MERLIN, resource.

7. Branch Codes/Numbers Updated on Standards and MERLIN:

- T. James pointed out that some of the branch codes in MERLIN are obsolete and should be removed. These are actually the branch addresses used in the limiting table. R. Kespohl offered to fix the standards, and to include the inactive data for historical purposes. Codes 16, 20 and 21 had already been made inactive on MERLIN, but the numbers remain open so that the other branch location numbers don't shift.

8. Richard's Authority Workshop:

R. Amelung.

- Before going over sample reports, R. Amelung walked the group through the sequence of events that authority record processing currently follows, and covered some of the history of the MERLIN authority file. Importance was stressed on

understanding whether individual records were in the local or national file before either deleting or coding for deletion. He then presented examples from two different sources: the duplicate authority report from Innovative and WLN's name change and no match reports.

- A key concept covered in all of the reports was differentiating whether an authority record must be coded for deletion to remove it from the local or national history file, or whether it must be directly deleted.
- In cases of a split file on MERLIN with no OCLC authority record, general practice is to use the fuller form of the name unless the other form is used 80% or more of the time, and to use the form of name found in the 245. The question was raised of adding a local authority record for a cross reference to other forms of the name. R. Amelung responded that the general rule is that a cross reference is only added for changes to the left of the comma, or for changes in the first element to the right of the comma.
- Several people commented that there were items on the no match report for which local authority records exist, and that those local authority records are not new. R. Amelung said he believes that WLN didn't run the bibs against the local file for some period of time, but no one can be sure.
- C. Gould commented that WLN is changing the appearance of the reports. In future for deletes or significant changes there will be a side by side comparison, which should make the process much simpler.

9. Millenium Cataloging:

- Millenium Cataloging will be available for installation in the next few days. Several MQCC participants expressed interest in some training in using MilCat. Pat Seavey from MCO was brought in and introduced to the group as the person who would conduct that training, which will be in a lecture format, not hands-on. It was decided that two sessions would be necessary, one at MCO, one in St. Louis, at UMSL. Dates and times to be decided via the list.

Items for Follow-Up:

- Kathleen to update the load table labels to conform to current standards (MARC21 filing indicators for authorities).
- C. Gould to check to see if the file size for the WLN pull is small enough to send a full year.
- N. Stancel to take a statement to the next MCDAC meeting that MERLIN is desynchronized in relations to bibs and authorities.
- N. Stancel to pass the IEEE conference linking information to MRSC and see what they prefer.
- R. Kespohl to fix the standards for inactive branch codes, and to include the inactive data for historical purposes.

Next Meeting Date: March 20, 2002

Next Recorder: SLU Pius