

MOBIUS Catalog Design Advisory Committee
March 12, 2004, Columbia, Mo.

Present: Michelle Turvey, Acting Chair (SWAN); Carol Bennett, Fran Stumpf (Archway); Georgia Baskett (Arthur); Denise Pakala (Bridges); Melissa Muth (Galahad); Stephen Wynn (LANCE); Sherry Mahnken, Anna Zaidman (MERLIN); Donna Bacon (Springfield-Greene County Library); Phyllis Holzenberg (SWAN); Andrew McGarrell (Towers); Pat Logsdon, Mark Scharff (WashU); Cheryl Couch-Thomas, Karen Fiegenbaum (WILO); Jim Dutton, Christopher Gould, Gary Harris, Patricia Seavey (MOBIUS Consortium Office)

1. Jim Dutton began by giving a status report on decisions from the previous meeting.
 - a. The Pickup anywhere project has slowed down because of patrons wanting (?) to request material from their own cluster
 - b. Baptist Bible College is currently in implementation, but will probably not be in the catalog by Apr. 1; Kansas City Art Institute expects to go live in August.
 - c. Stephen Wynn will be a presenter at IUG in Boston, on using perl scripts to generate reports.
 - d. The problem with extra browse entries being generated in the MOBIUS catalog from references in name-title authority records where the name heading has dates in [d hasn't been checked for resolution [n.b. The problem persists]. It remains an open call with III.
 - e. Field labels have been changed to the longer forms; music numbers from 028 and govt. publisher nos. are now links; the "strong not" is fixed ("Bud not Buddy" is searchable as a phrase); and libraries have the option to set the "AVS perform adjacency search." BCode mapping for material types has not been done.
 - f. In response to requests, MCO recommends that all advisory committees make their meeting minutes available to users. This could be done by offering a read-only file for viewing by passworded members, or through wider e-mail distribution.
 - g. Jim and Patricia Seavey will work on drafting a document outlining procedures for more official dissemination of advisory-committee policy decisions.
 - h. Other items from the agenda (informational)—Of the MOBIUS status labels, AVAILABLE is the only one in capital letters; Springfield-Greene County loans do not count as MOBIUS loans.
2. INN-REACH Enhancements.

Jim showed the list of requests submitted by INN-REACH users last year. He recommended that we resubmit the request to have matches on the 019 field be reported for the 2004 list; the group concurred. Gary Harris explained the decision-making process and stressed that many of last year's "losers" will resurface on this year's list. Discussion on specific items:

- a. Using field 856 for freely-available electronic resources and 956 for subscription/restricted resources and displaying only the former in MOBIUS—the group endorsed this approach.
- b. Post-request button for RETURN TO BROWSE (Bridges)—Jim said that his impression was that the button should already be on the screen. MCO will investigate, but at any rate, it should be a fix rather than an enhancement.
- c. Grouping of holdings and item records in display (Lance)—this discussion got conflated with a proposal to suppress display of item records for non-requestable items (Archway). The major problem to address is the chaotic display for titles with very large numbers of attached records; the screen design doesn't segregate holdings of individual libraries clearly, within a cluster, newly-added item records do not cluster with others from the same institution, holdings and corresponding item records are sometimes separated by many lines. MCO has concerns about how item records would be suppressed, particularly if that suppression caused the item record to not "go up" to MOBIUS and therefore not be reflected in statistics; its preference would be for clusters to suppress item records with the value "n" in ICode2 (or "I"). Clusters need to discuss suppressing records, but it was also recommended to pursue an enhancement such as a clickable link to lists for each cluster.
- d. Prompt patron to continue search (Lance)—the desire is to prompt patrons to pursue a failed search in the next larger database. There is already a button to prompt a MOBIUS search, which could be moved closer to the "NO ENTRIES FOUND" message (the group agreed to do this in any event). Adding the ability to move from scoped to unscoped search would be an enhancement, probably INNOPAC. Some felt that such a prompt would be intrusive and therefore not desirable. Hardy Pottinger expressed reluctance to add Java scripting for the scoped-unscoped search. Ultimately, this is a cluster decision.
- e. View local bibliographic records (WashU)—this would allow a searcher to view the local version of a bibliographic record from the MOBIUS record, mainly to allow view of local fields that aren't uploaded to the master record. The proposal suggested a pop-up window, but it was felt a better approach would be to construct a URL on the fly to allow the link back to the local record in a new browse window, which would then allow viewing of attached records, the MARC view, and other options. The group endorsed this.
- f. Pass-through search (MERLIN)—this is a request to use the search that resulted in a bib record being displayed in a local catalog for the pass-through search in MOBIUS, rather than the bibliographic record no. of the displayed record. This would allow the inclusion of other editions, manifestations, etc. of the desired work in the MOBIUS search result. This was endorsed.

- g. URL display in checkin records—the request is to display URLs across the last three lines of a holdings display. This got approval.
3. Record de-duping project—Gary Harris reported on progress. Bib records without 001 fields specifically slated for inclusion by clusters were sent to OCLC in August, segregated by cluster. The records were matched against WorldCat; MERLIN's file was done first because of it is the default holder of master-record status in MOBIUS. The matching was done in two passes: the 1st pass employed a very strict algorithm, while records not matched in the 1st pass were run through the OCLC DDR algorithm, considerably more “fuzzy.” MERLIN questions the integrity of the matching, particularly for the DDR-matched records. MCO asked for and received a file of records that were matched through DDR; it is proposed that these be loaded with a 912 field to allow local verification of the match. Gary and MCO staff did a quality check of a subset of the total MERLIN file (200 records) and found a 6% error rate (described as “technical” (i.e. mismatches on edition, publisher, or year) rather than “gross” (i.e. mismatches on title or author) errors. The position of the MCO director is that an error rate of less than 10% is acceptable. Anna Zaidman (MERLIN) asked whether there was a contract with OCLC spelling out expectations for accuracy; the answer was that there probably isn't, which brought the question of who would bear the costs of fixing the problems. MERLIN reported that the first reload of records was marred by tags being stripped from fields; the tags were restored, but the source of the problem has not been identified. Pat Logsdon (WashU) said that clusters should have the option to ask OCLC to unattach holdings and strip out 001's from problems. Gary questioned whether this was a desirable move for institutions; it would certainly have a cost. Anna responded that MOBIUS had acted the role of contractor of a badly-done project. Gary responded that MCDAC had approved the project “no questions asked;” Pat remarked that MCO presented the project to MCDAC last July as a *fait accompli*, not a voting issue; Gary acknowledged general culpability, adding that the MCO person behind the project has since retired, but asked for a focus on finding solutions. Christopher Gould offered some explanation of the problems with the DDR algorithms. At the top, MOBIUS Director George Rickerson has directed the project to continue, and will have to hear other recommendations from a member of the committee. Gary said that everything could be undone readily, except deleting the OCLC holdings. Archway representatives expressed appreciation for the project, which provided OCLC numbers (matchpoints) for so many records that lacked them in their cluster catalog, effectively reducing the frequency of multiple OPAC entries despite introducing occurrences of mismatches on variant editions. Action items resolved were for MCDAC to have an e-mail discussion during the following week, and for Gary to send spreadsheets detailing the statistics.
4. Remove author/title search from MOBIUS—MCDAC had voted to do this since the feature does not work correctly at present, but it has not yet been done. A request will have to be sent to the III help desk.

5. Public display labels feedback—the group reviewed some of the changes and heard reports of positive feedback.
6. MOBIUS FAQ—the question is, what’s the next step? The group approved of the changes proposed; Bonnie Sanguinet will be asked to send the document to the MCO Help Desk for posting.
7. 891 field—The issue is retaining this field, which contains coded information on publication patterns for serials. Archway, Quest, and MERLIN are already retaining it; the question was whether other clusters would like to follow suit? Some have already decided in favor, but too recently for the change to have been effected. Consensus was to turn it on for everyone. III has developed a loader that can make checkin records from information in 891 fields, but it’s a product and MCO doesn’t have the funds to buy it at present.
8. Feedback on blank request status for checkins in MOBIUS—MCDAC had asked to remove status information from lines for checkin records; this has been done and is satisfactory to all
9. Members link to title title display screen—this Archway proposal was deemed to have been covered by the WashU enhancement proposal to provide a link back to bib records in member catalogs.
10. Suppressing display of individual serial item records when checkin is present—This was folded into the discussion chronicled under point 2.
11. Addition of call no. search option in MOBIUS—requested by Arthur. Jim mentioned that only call numbers in bib records are currently indexed, having been surprised to find that they were being indexed at all. It was decided to remove the option from dropdown menus to avoid confusion. Jim may pursue change to the profile to make call nos. unindexed.
12. Marcive workflows—Michelle Turvey (Swan) asked for Marcive government document users to have an online discussion on workflows. She received some suggestions, particularly in dealing with headings reports.
13. New business—Jim reported on a phone call from Susan Lewis (MLNC) about LDR holdings. Some institutions had asked for their records to be “wiped” and reloaded. This is a problem when records from the Early American Newspaper Project are included, because they can’t be batch-reloaded.
14. These clusters are up for electing new MCDAC representatives in July: Bridges, Quest, SWAN, WashU, Arthur, and WILO.
15. The meeting adjourned ca. 1:15. Next meeting: July 9.