MQCC minutes--May 19, 2004

Present: Mary Aycock (UMR), Alla Barabtarlo (UMC), Norma Fair (UMC), Wendy
Fritzel (UMC-HSL), Christopher Gould (MCO), Gary Harris (MCO), Ting James (SLU-
Law), David Owens (UMSL), Carol Riley (UMKC), Kathleen Schweitzberger (UMKC),
Nancy Stancel (UMKC-Law), Maggie Trish, Chair (UMR), Anna Zaidman (SLU-Pius).
Guest: Renée Crandall-Witte (UMSL).

1. **Introductions, announcements**
   Wendy announced that within a few weeks she will be submitting her resignation at
   UMC-HSL. She plans to get married and relocate to Huntsville, Alabama. She is
   conducting a job search for employment in the area.

   David introduced Renée Crandall-Witte who works in the cataloging department of
   UMSL.

   Kathleen announced that UMKC libraries has a new interim dean of libraries, Joan
   Dean, who is a faculty member from the Department of English. She has been a
   strong library supporter and will fill this role for a year before returning to regular
   teaching duties. UMKC also has formed a transition team of six people (including
   Kathleen) that will work on creating a new job description for the dean of libraries as
   well as start a search.

2. **LSO/Announcements**
   Gary stated that MCO has now loaded all the dedup records for Mobius clusters,
   except for Washington University which Christopher is currently loading. He has not
   heard many complaints about mismatches, only on the size of the headings reports
   that list duplicate OCLC numbers.

   Christopher announced that current cataloging reports no longer appear in text or tab-
   delimited form. UMC requested, for workflow reasons, to change the distribution of
   the reports back to the previous division of the 1xx, 4xx, and 8xx tags appearing in
   different reports. The rest of cataloging centers agreed to this change. [Christopher
   later forwarded an email on 5/24/04 in which the vendor reported they no longer had
   the capability to split the reports by tag.]

   Also, Christopher reported that the dedup records no longer have a bcode3 of x, as he
   changed them to a dash. These records will specify "OCLC dedup" in the 003. Gary
   mentioned that Christopher was also pulling a list of all the records which missed
   being picked up in the regular MARS updating due to the temporary coding of
   bcode3. Merlin had less than 300 of these records.

   Christopher briefly recapped the recent AACP failure. In the course of investigating
   why AACP apparently stopped working after the MARS load, it was discovered that
   AACP stage 2 actually failed on May 1st & restarted on May 17th. A call has been
   sent to III's programming department asking: 1) why it failed, 2) why it restarted

itself, 3) why no one knew about this. Records had been queuing up for 3 weeks in Stage 1. However, unlike stage 1, stage 2 is not flagged by an alarm if it fails.

Gary mentioned an open call placed by Anna in which a scoped search for a 4xx title failed to produce a cross reference to the authorized 1xx heading if the bibliographic records contained volume information. For example, searching "Einweisung in das christliche" under SLU-Pius' scope will not produce a cross reference to "Selections. German. 1981," even though there are three bibliographic records (albeit with volume information). Innovative's proposed solution of creating set records for every series is unacceptable. Per Anna's request, Christopher has sent an email requesting additional documentation and is waiting to hear back from an opac supervisor. Gary observed that in cases which affect the entire catalog, MQCC should be included in the loop.

3. **Dedup Project**
   Jim Dutton stated that Colleen will soon finish with processing a small library's dedup list, and should soon be ready to start on a new project. Her procedure is to transfer any important material, including table of contents and summaries. Members agreed that in order to effectively work on this project, Colleen should be given authorization to transfer all records. Jim reported that she typically works in GUIcat (which cannot move checkin records), and he would need to ask if she would be willing to work in the character based interface. He did not expect that she would find many checkin records attached to this older material. Colleen will watch for any sort of mismatches that seem to be occurring. The majority of mismatches in this project seem to be edition or publication year mismatches. However, both Maggie and Carol have found at least one title mismatch. Members at the meeting provided contacts to Jim so Colleen can contact cataloging centers about any discrepancies or questions.

   The question was raised about when Millennium Silver will be released and installed. Gary reported that the latest he heard was that the release date was early to mid summer. MCO will not install it until after it goes in general release. He hopes to implement it before the fall semester starts.

4. **Marcive—holdings set properly on OCLC**
   Holdings now are being set properly in OCLC for ongoing Marcive records: this goal was just accomplished in the past month. Christopher has heard nothing about recon, so will send a note to Jim at Marcive today about it. Holdings have been incorrectly set for at least 2 years, when Marcive began consolidating tapes for OCLC. [As per 5/27/04, Jim reported that holdings had been set retrospectively for all 5 campuses.]

5. **Electronic resource issues**
   a) ECO holdings versus unavailability - Kathleen reported this may be a non-issue as other campuses besides UMKC will likely drop the package. Moreover, UMKC will probably subscribe to it on a calendar year basis, thus avoiding the problem of the lapse in access.

b) Linking of free resources - Mary wondered what the procedure should be if an open-access journal is cataloged in Merlin by another institution as if it was under the subscription model. Anna recommended that it be considered similar to any other free resource, and the coding in both the 856 and item record should be changed to scope to everyone to reflect its free nature. However, she cautioned that the person coding the record should make absolutely sure it is free, and send a note to other institutions in ambiguous cases.

c) Cataloging digital objects/collections - Kathleen clarified that this question really concerned collections. First, should there be an access point for some of the items that are being digitized? In other words, within the standard ways that we catalog items, should there be a few special fields? Much of these materials that are being digitized are rare materials from digital collections. Also, should we be following guidelines for special collections materials when making records for these collections? Kathleen will mock-up records that they have created for digital library and send them to the list as an example.

Also, UMKC has noticed that another library in Virtually Missouri has been inputting themselves in the metadata record as the publisher of the digital object. Original publication information is being relegated to a note. It seems that Virtually Missouri should follow a standard in the type of metadata that should be input in the fields. Standards will thus ensure that Dublin Core will properly crosswalk to Marc and vice versa.

Ting announced that Richard anticipates records from the LLMC (Law Library Microform Consortium) will be inserted into the Merlin database soon. These records will represent the digital version of the microfiche, which will only be available to subscribers. The whole project comprises about 10,000 records, and it is ongoing, starting with federal documents and working down to documents of individual states. Three law libraries in the cluster (SLU-law, UMC-law & UMKC-law) are subscribing. Richard also wants to mention that CONSER's new policy has shifted to aggregator neutral records.

6. **Agency codes**
   The question about agency codes concerns the type of situations for which Merlin is using the agency code "0". From discussion with the head of technical services, Carol discovered that agency code "0" was set up as a collection management code, particularly for items not on campus (such as withdrawn material, University of Missouri Depository material, and electronic items). Internally, libraries could use it for other purposes (in UMKC's case it has been used for the government documents area). Currently, nothing is written in standards about use of the agency code. At the very least, MQCC should have a section specifying all the cataloging center agency codes. This field also impacts web management report, since it will only run under one agency code. With regards to electronic items, cataloging centers currently have varying practices. Members agreed that this issue needs to be brought to the MCDC group.

7. **Headings report for SHS newspapers**

   Norma, Erin Kaye at the State Historical Society, and Kathleen have kept passing four headings reports back and forth. No other cataloging center has apparently come across these SHS reports. The State Historical Society has started a project of adding "|v newspapers" to subject headings. Also, 651s are being added to the records. Kathleen volunteered to send geographic headings from these records to NACO, if they are forwarded to her.

8. **Email printer option**

   Maggie stated that in essence, this function does not work the way you would expect it to, or according to how the manual describes its functioning. The note specified does not appear as the subject line, nor does it change with any subsequent bibliographic records. Kathleen requested that this feature be activated for tomorrow only, so she could test it from cataloging and circulation workstations. Christopher will check on that possibility during lunch break. If it does not work according to the manual, it should be fixed. [Christopher later reported that he was trying to coordinate with the coordinators to turn on this feature during specific days, and would get back to the group about this issue.]

9. **Form/genre vs. LCSH headings**

   In response to the issue of the genre headings being confused with LCSH headings, Innovative stated the solution was to place the genre headings in a separate index. The form genre heading is currently indexed in the LCSH index, and doesn't distinguish between the 150 and 155. Since genres in general have so many thesauri to draw on and they are not in a central location, the question was raised whether MQCC wanted to continue subscribing to this service. The confusion between the two subject headings seems counterproductive. Members agreed to stop receipt of the authority records and remove any existing ones. Christopher will make a list of these records and notify the group before coding them for deletion.

   On a side note, UMKC was asked if they ever used the terms electronic theses/dissertations. Kathleen will check on this and get back to the group.

10. **Standards updates/changes**

    The question arose as to whether the 667 was protected. The authority tables show they are not, but the MARC 21 authority format tables in Merlin show the second indicator values of "2" and "9" of the 667 as local. In fact, MQCC did decide to code local 667 as 690's, and not protect the 667's. This hasn't yet been reflected in the standards. Kathleen will update the MARC 21 codes for the Innopac system.

    In terms of adding the |5 for locally added reference and notes, that procedure made sense to the majority of the members.

Anna also mentioned that the 13 digit ISBN should be coded for the 024, with a second indicator of 3. Innovative will be able to handle it but when OCLC is able to input it in the 020, we will need to clean up this field.

11. Standards – format change

Maggie suggested that each cataloging center might like to choose a section to review. These sections could then be revised to reflect current policy (including a meeting date when the particular policy was adopted would be a helpful addition). The sections were divided up according to the list below:

3. General	UMR
4. Bibliographic records	UMSL
5. Authority records	SLU-Pius (UMC-HSL will do Mesh)
6. Fixed length data elements	SLU-Law
7. Holding records	UMKC
8. Individual MARC formats	UMC
9. On-the-fly & collection level records	UMKC
10. Importing & exporting records	UMR
Appendix A: Naming patterns for review files…	No need to review
Appendix B: Merlin System Codes	Will be deleted
Appendix C: Distribution of Merlin reports	Christopher (MCO) *{now Appendix B}*
Appendix D: Diacritics & special characters	Will be deleted
Appendix E: Branch location codes	UMKC *{now Appendix C}*
Appendix F: Local subject headings	UMC *{now Appdendix D}*
Appendix G: Call # normalization schemes	Christopher (MCO): *{now Appendix E}*

In terms of any new material that should be added to the standards, Norma mentioned that it would be helpful to have a list of electronic resource standards for the genre headings used for government documents. Such a resource would be handy when doing retrospective cataloging. Kathleen will check to see if she can find where to look, as such a list should be in the bibliographic record standards.

Members agreed that they preferred the web-based format that Anne Dykas had composed using the Dreamweaver program. Kathleen reported that it took Anne 2-3 hours to do section #8, which is one of the longer sections. After the standards are updated, what the group really needs is a webmaster to coordinate uploading these files with Hardy. Also, a summary of the formatting for any future webmasters would be helpful in achieving consistency. Since Anne did such a good job on the sample, Kathleen will ask if she would want to be the webmaster. [Note: Kathleen reported via email on 6/17/04 that Anne accepted the role of webmaster of the MQCC standards.]

Ad Hoc Comments

Kathleen brought up an email that had been sent off-list regarding a gentleman's agreement originating from the LUMIN era. It has been customary to notify UMC and UMKC if any changes are made to the main entry of serial records on which they have

holdings. The reason behind this custom is that UMKC's entire periodical collection and UMC's current, unbound periodicals are shelved by main entry. Once notified, UMKC will either reclassify them or put up a dummy redirecting patrons. This understanding was never spelled out in the standards. Anna responded that 1) no one told SLU, 2) it has just now become an issue, and 3) could a different system be implemented rather than notification due to staffing concerns? She explained that changing the main entry can happen fairly often, as SLU-Pius catalogers tend to upgrade records when viewed, including upgrading them according to CONSER standards. In fact, since SLU-Pius will soon become a CONSER library, they will be interested in upgrading records on a regular basis. Kathleen said that she would use this as an additional argument for her argument to reclassify the serials according to LC.   Anna conceded that if we could agree to notify just one cataloging center (UMC), it might be possible for SLU to fulfill this notification requirement. Both UMC and UMKC will consult with their reference staff about possibly changing the current practice of shelving by main entry. Maggie will check back on the list about this issue in a month.

Kathleen updated MQCC on her interpretation about "feeding & foods." Section H1147 in the Subject Cataloging Manual states that any "Any subdivision listed here can be used as a free-floating subdivision under any heading belonging to the category if it is appropriate and no conflict exists in the subject authority file." Also, domestic animal headings previously belonged to another pattern (H1148), which was discontinued and the merged with H1147.

Wendy emailed CPSO asking them to remove the 450 of "feeding and foods."

Maggie suggested submitting an enhancement request so rotated headings will appear in their actual order. Gary mentioned that libraries can submit such a request to MCO or directly to Innovative as an IUG member library.

Maggie brought up another issue: the purchasing of openURL link resolvers. The UMR library is putting forth a proposal to form an information commons, similar to many other Merlin libraries. In this proposal, they are requesting funds for some software, including an openURL link resolver. She was wondering if any other campus is looking at such a product, and the feasibility of buying such a product consortially.

Kathleen approved of the idea, as long as they could get the metaproxy server to work for all centers in the cluster. Maggie believes the coordinators summarized the need for such a product and it is now in the directors' committee.

Maggie obtained a quote from Serials Solutions for the Merlin cluster: $28,000 for their knowledge-base (AMC) and separate MARC records. Maggie pointed out that, especially for smaller cataloging centers, it is difficult to keep up with all the links and changing years. Most of the libraries do not have all the packages linked up in the catalog, especially constantly changing aggregators. UMSL & UMR are on the verge or purchasing some of Serials Solutions' products; UMKC & SLU are using the product now. UMC uses TDNet as a stand-alone product for electronic journal management.

Updates to URLs and holdings must be done manually in MERLIN. In regards to MARC records, it really falls in our domain as well as the Serials Acquisitions group and MRSC. Maggie will email the list about the quote.

Purchasing MARC records would mean a change from single to the separate record approach. Such a change would provide a few options, such as specially coding the material type icon if we turn it on. It might be a good idea to restart the conversation about single versus separate record approach. In case it turns into a reality, we would have to go back to records and eliminate the 655's and links to avoid double handling.

Meeting adjourned at 1:35

Next meeting: July 21, 2004

Next Recorder: UMSL