Joint Meeting of
MERLIN Reference Services Committee
MERLIN Quality Control Committee

UM Library Systems Office
August 19, 1998
10:00 a.m. - 3:00 p.m.

Meeting Chaired by Richard Amelung, MQCC

Minutes by Raleigh Muns (UM-St. Louis)

Attendance (based on name placards):

Raleigh Muns (UMSL), Ellen Grewe (UMSL), Judy Siebert Pallardy (MU), Geoff
Swindells (MU), Norma Fair (MU), Vianne Sha (MU), Rebecca Graves (MU), Cindy
Shearrer (MU), Janet Jackson (LSO), Gary Harris (LSO), Jamie Macinnis (UMR),
Laura Gayle Green (UMKC), Kathleen Schweitzberger (UMKC), Jane Allen (UMKC),
Richard Amelung (SLU LAW) Linda Hulbert (SLU HSC), Pat Gregory (SLU), Anna
Zaidman (SLU PIUS), H. Sylvia Toombs (SLU HSC), Carol Antoniewicz (Wash. U.)

   RICHARD:

During the discussions at the last MQCC meeting, and in conjunction with having
access to a significant number of electronic journals, we didn't feel
comfortable in addressing certain issues that were primarily display issues. To
provide to our users in a consistent fashion, and in a way that the public
services personnel would find most useful, we decided we needed a joint meeting
to address all issues and then be done with them forever.

INTRODUCTIONS

   JUDY:

I've asked Jeff Swindells to join us as Government Documents representative
since there are so many online government documents.

   RICHARD:

I've come up with "Points to Consider" that I hope we can get through today
(handed out).

As I understand, there are two different, distinct products to consider. One is
project MUSE to which everyone has access. The second is the ECO "Print
Subscribers Program" with somewhat around 250 titles. These titles are available
to the campuses which maintain print subscriptions.

I was under the impression that subscriptions were by campus, and not by
library.

(Access to online titles is by IP address checking on campuses, not libraries)

Right now there is a list out to verify the ISSN's of the titles to which you

should have an active subscription.

ACTION ITEM:
Set an MRSC deadline for each campus/library coming up with list of "Print
Subscribers" ISSNs/titles to which they are subscribers.

NORMA:

Is this "Print Subscribers" the same as ECO?

("Print Subscribers" refers to the trial program via ECO where we don't pay
extra for accessing journals to which we subscribe. We are also getting access
to Project Muse titles via ECO)

RICHARD:

We should have access to MUSE and the "Print Subscribers" program. IDEAL titles
were originally part of this, but because of current pricing is no longer one of
the products being considered.

Please note that we're going to be talking about the two different displays, web
and character-based, of the online catalog.

How many people rely upon the character-based catalog?

(Unanimous raising of hands)

When there are different types of records, item, order, and check-in, the
character-based system will choose one type to display first. If the choice is
between item and check-in records between multiple campuses, the check-in record
displays by default, masking the item record.

Example: American Historical Review (demonstrated for the group)

This is the situation where the patron has to hit "V" to see the item record.
The item record will be masked in a non-scoped search.

There is also a difference between an active check-in and inactive check-in. If
a site has a current subscripton, their check-in record will display in front of
a site that has an inactive subscription.

LINDA HULBERT:

Active check-in records cost more than inactive records.

JUDY:

Do we use an item record or a check-in record for an electronic resource? Also,
an item record is not hot-linked.

RICHARD:

This is all less important in the WebPac because everything scrolls. You might
have a number of check-in records SOMETIMES filling up the entire initial

screen. This should not happen often.

JUDY:

The rearrange program for displaying by campus is displaying alphabetically using the label, and NOT using the location code.

RICHARD:

Consider the URL in the record. This supplies the hotlink in the WebPac. This is pulled from the 856 field on the MARC record. The 856 field does not currently display in the character-based. We can turn this infomation on, but it is up to MRSC to determine how this will display.

JUDY:

If we put additonal information in the z field, the u field will not display. Do we have the option of displaying different portions in different systems?

GARY:

We don't know the answer to that question.

LINDA HULBERT:

You can duplicate the information in the u field in the z field.

RICHARD:

If we want to display the z field, will the character-based be clever enough to display the z field if nothing is in the u field?

Ok, in public character-based display, we have limited space on the screen. Another consideration is where or how to get this on the first screen.

JUDY:

We've been looking at using the 856 field to generate a list of journals for a web page.

GARY:

We're doing this kind of thing for the URL checker.

RICHARD:

Is it generally assumed that we want III to turn on the display of the 856 field?

CONSENSUS: Yes

ACTION ITEM:
Ask III if the 856 subfield u can be displayed in the record if we use the subfield z contains text for the connection (for either Web or character-based)?

GENERAL DISCUSSION

GARY:

We can control WHICH subfields to display.

JUDY:

So we need to know what happens when we put text in the z field.

VIANNE:

The character-based will display whatever we put in the 856 field.

ACTION ITEM:
Ensure the display of the URL somewhere in the record (display u AND z
subfields).

JANET:

If space is an issue, you could display on two separate lines if necessary.

JAMIE:

What about the problem of campuses where only THAT campus has access, and others
do not?

RICHARD:

That's another problem. In our examples here, we've only been displaying MUSE
titles to which everyone has access.

ACTION ITEM:
Activate the 856 field so that subfield u and z BOTH display in the body of the
record. The 856 field will be the highest note displayed above the first 5xx
field.

GEOFF:

The 538 field needn't show the URL. For instance, GPO does not and will not
display the URL, rather, usually just the host site.

JUDY:

The z field should display first, since it may have access restriction
information.

RICHARD:

Did you want the m to appear after the URL? (m is the "person to contact")

GARY:

Ok, z, u, then m.

JUDY:

And we'll decide later if we even want to use the m field.

RICHARD:

What label should we use? Note that the 856 field will always contain a URL.

VIANNE:

It's actually possible that some LC records will not have URLs.

EXTENDED DISCUSSION ABOUT LABEL FOR URL FIELD

ACTION ITEM: The label will be "URL" for displaying the URL

CAROL:

Wash. U. has been cataloging the Project Muse titles. The label for displaying
the 538 field is ECONNECT.

DEMONSTRATION OF TITLE "Callaloo" ON WASH U WEBPAC AND CHARACTER-BASED

RICHARD:

The next group of concerns deal with "inputting". We are operating under the
assumption that we will use a single record approach when at all possible,
rather than multiple records.

Merely attaching the URL does not in any way help a patron who is working in a
scoped environment. There must be some type of record attached to the bib record
which will pull this record up when the patron is working in a scoped
environment. The choices are either to use an item record, or a check-in record.
It doesn't matter what type of record is attached, as long as it has the
location information in it. The item record is necessary for a call number
search.

JANET:

If it's a Columbia item it's in all the scopes. . .

RICHARD:

There are different types of electronic locations. There are "e" locations where
items will fall under ANY scoped search. Some sites have set up location codes
for electronic resources to which ONLY they have access to. THOSE locations will
only fall in the particular narrower scope. The question here is will one use an
item record, say, for a Project Muse title, or will one use a check-in record?
There are dangers with either choice. With an item record, use of the item
record will not be in first evidence in the character-bases. If there are a lot
of check-ins, it may also be masked off the first screen in the WebPac.

So, for a Project Muse title where you don't own the title, someone can retrieve a title, and not immediately see WHY the item was retrieved.

If one uses a check-in record, the item will be "more up front." The problem with using a check-in record is that they fall under the serials acquisition realm which are separate accounting units. If ever there needs to be maintenance on the check-in record, only the inputting library can go in and do the maintenance needed.

NORMA:

See using the WebPac and character-based the following sample title for your consideration about how these can be treated:

Example: American Journal of Political Science (displayed and discussed for entire group)

GENERAL DISCUSSION

JUDY:

What happens when you drop the subscription, and then still have access to the archived backfiles.

RICHARD:

The 856 field would be changed. The question then becomes "where do you show coverage?" Do you use the 856 field or the check-in record?

It seems to me that Ellis has been leaning towards showing coverage (by date) in the 856 field, is this correct?

NORMA:

Yes.

LAURA:

I'd like to point out that it's a serial and should be treated like a serial. We should see the holdings statement as we would see for any other serial.

VIANNE:

I agree, but the practical aspects . . .

RICHARD:

It might be that when a title starts at volume 18, say, that when the entity inputs this they open it up, then don't have to update the record with newly arriving issues.

GEOFF:

It's not a question of check-in records OR using subfield z, we have to use

sufield z on a check-in record to give the user the information as to where to go.

LINDA:

Is it possible for those items with the e-codes in a check-in records to be modified by anyone?

GARY:

... check-in records by number range.

JAMIE:

Can't we delegate blocks of titles for responsibility of maintenance?

RICHARD:

The Directors have directed that none of the print subscriber titles should be dropped until the 1999 end of the "Print Subscribers" ECO program.

JAMIE:

The other approach would be to make us a single accounting unit.

RICHARD:

Only if you'd be willing to let me spend your money!

The solution to the problem is, indeed, having essentially a dummy accounting unit. I would see that as something to look at two years from now.

LUNCH BREAK

RICHARD:

Before lunch we were discussing the intersection of patron satisfaction and employee maintenance and administration of location information. One option is to include this in the 856 field, subfield z; another option is to put location information in a check-in record; finally, we have another option used at Claremont College: they use a 949 field (locally defined tag). Claremont is generally carrying their holdings information in the 949 field.

WEB ACCESS TO CLAREMONT COLLEGES DEMONSTRATED

JAMIE:

What is the difference between the 949 and 856 field?

RICHARD:

The 949 field is a local field. Also, we've used the 949 field for exporting records. The question is whether we can use the same field. At the least, we could use another 9xx field the same way. Another question is where this would

appear in the character-based catalog. We could use another field and have III turn that on for the public. The value of the 949 field is to carry the holdings information.

NORMA:

The 949 field is not a hot link, it's just for information.

RICHARD:

You're going to have to attach a record to the bib record no matter what you do.

JANET:

If you always put the holdings information in subfield z and never created a check-in record (using the check-in record for paper only) . . .

LINDA:

When you tinker with bib records in an environment like ours, you increase the probability of problems occurring.

Ok, there's an ECO title and we have a paper subscription as well. So, we decide we no longer want the electronic record. But, since ECO gives us access in perpetuity, we will always have access to the title for the years we subscribed to it in electronic format . . . the holdings information in the body of the bibliographic records in this scenario is risky.

RICHARD:

You're going to have multiple 856 fields, naturally, when you have different sources. Another problem is when you have different sources with differenct time periods of coverage.

JUDY:

It would never occur to me to go down to a specific URL at the bottom of the record to find the range of years covered by an online journal. You're going to have to have multiple 856 fields to display near the top of the record.

LAURA:

What we're trying to do is create check-in information in the bibliographic record.

JUDY:

If there were a hotlink in a bibliographic record this would solve the problem. This would require a paid enhancement from III to implement!

LAURA:

What would happen if we looked at forming the 856 sort of like we form the check-in records? Using the same sorts of language in the check-in records so

that the information is parallel.

RICHARD:

... saying "MERLIN Library has" and if it's an ECO title we list "SLU, MU" etc. holds.

GENERAL DISCUSSION CONTINUES

CAROL:

What happens to the record when it goes into MIRACL?

(good question)

LINDA:

What is it going to say when Wash. U owns it?

CAROL:

"Wash U and MERLIN"

ACTION ITEM:
Find out if we get access in perpetuity for the backfiles of the "Periodical Subscribers" titles we're accessing now.

EVEN MORE GENERAL DISCUSSION!!!!

KATHLEEN:

We've also have the question as to whether something is loanable via ILL. Do we want to put that information in the 856 field. I just wanted to throw that out

VIANNE:

We can always use the access restriction fields to control these things.

RICHARD:

We're looking at subfield z which will contain the name (symbol) of those sites that have access . . .

LINDA:

If a library already has an item or a check-in record, do you really need an item record for the electronic version?

RICHARD:

No. The question is, however, except for Project Muse, it will only work universally on those titles that everyone already has.

KATHLEEN:

We've got to have something in the bibliographic record for scoping.

RICHARD:

And, why do we have to have 5 people go in and add 5 item records when we need only one?

The 856 field will indicate who has access. Just to get standardization, we'll use the initials that are already being used in the catalog, MU, UMK, UMS, SLU, etc.

LINDA:

You're looking at the sharing the workload of creating item records.

RICHARD:

Yes.

CAROL:

Note that the current Wash. U. records don't reflect the standards and decisions that you are discussing now. Since you're moving on this now, before we consider it, we're likely to tag along and do things the same way to make INNREACH work and look similarly.

GARY HARRIS DEMONSTRATES RECORD MODIFICATION (LSO SAMPLE RECORD)

Results:

HTML entered in a check-in record is respected by the WebPac. I.e., if you type in HTML, such as a link, you can display it in the WebPac and the HTML will work. This will allow one to have a check-in record with a hotlink for the WebPac, leaving the bib record unsullied. The following link was typed into the "Library Has" field:

v 1(1924)-

Which displayed EXACTLY as above in the character-based catalog, but displayed as a hotlink:

v 1(1924)

in the WebPac.

MORE DEMONSTRATION OF RECORD MODIFICATION

RICHARD:

If we did things using this feature in the identity field which allows virtually unlimited space, when we updated things we'd have to update them in two different plays. Ok, we're back to the 856 field . . .

Subfield z

    name of site that has access
    e.g.,   MU has:
        SLU has:

    RICHARD:

The assumption is, if a patron has a cite to an older title, the link to the
newer title (assuming a change) requires that the link be attached to all
records.

Note also, that when a subscritption to an electronic journal stops, the people
doing maintenance will have to remember to follow the title back through the run
to remove all of those URL links.

    JUDY:

Does this include things like the Encyclopedia Brittanica? Do we attach the
access information to all records for the Brittanica?

    RICHARD:

No, you do have access to the latest edition, but NOT to the earlier editions.

    JUDY:

Also, don't forget the 229 field (if it's print it should already be there). If
you search by journal title and don't find it, that means that the record
doesn't have a 229 field.

    KATHLEEN:

So we should make sure that the electronic versions have this addtional standard
of using the 229 field.

    RICHARD:

We're down to "initial inputting." Splitting this into the two parts, Project
Muse and "Print Subscribers," Kathleen will be fixing all the Project Muse
titles.

"Print Subscribers" sole owners will take care of the title.

ACTION ITEM:
Sole owners of "Print Subscriber" journals will take sole responsibility for
creating and maintaining those titles.

ACTION ITEM:
Jamie MacInnis to forward instructions to get directly to the ECO journals
without going through FirstSearch.

    RICHARD:

The next thing I'd like to propose is this: Once we determine the level of
unique holdings by site, of the 250 titles, let's say that Ellis holds 100 of
them uniquely. This means that Ellis has to do 120 records. Say KC has 80 unique
titles, but they share 20 with Ellis. I propose that KC do the 20 they share
with Ellis so that each does 100 titles (this is an example).

The two places where this becomes a question is at Rolla and UM-St. Louis. If
only you in MERLIN own this, do you use an "e" or do you use your local
electronic?

    JAMIE:

Are we striving for consistency?

    RICHARD:

I was leaning to having them use "e" locations. That way when someone adds a
subscription, you just go into the 856 field and modify that.

    LINDA:

Well, since I have access to your item record and I can change that, I can
change that to an electronic location.

    RICHARD:

I'm saying should I use an XLE or an EXL? Since this is a group purchase and the
entire campus has access I'll use an "e" location. It is different if only SLU
law has this and I have an XL location and you get access to it.

ACTION ITEM:
Disseminate "hot linked ISSN's" location file to MQCC, Excel Spreadsheet of
latest titles.

GENERAL DISCUSSION ABOUT SPLITTING UP CATALOGING RESPONSIBILITY FOR ECO TITLES.

    GARY:

LSO is purchasing the Linkbot software for testing URLs.

    RICHARD:

Anyway, we have to verify and get back to George, by campus, with the
information about current subscriptions which are on the OCLC "Print
Subscribers" list.

MEETING ADJOURNED
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