

MERLIN Quality Control Committee
Minutes -- December 10, 1997 (REVISED)

Present: Linda Hulbert (SLU-HSC); Anna Zaidman (SLU-Pius); Laura Hunter (UMR); Richard Amelung (SLU-Law); Vianne Sha (UMC-Law); Alice Allen (UMC); Ting James (UMR); Jane Addison (UMC-HSL); Robin Kespohl (UMC); Ellen Grewe (UMSL); David Owens (UMSL); Patrick McCarthy (SLU-Pius); Janice Carter (SLU-HSC); Kathleen Schweitzberger (UMKC); Norma Fair (UMC); Gary Harris (LSO); Janet Jackson (LSO); Vivian Lee (LSO); Anna Sylvester (UMKC), recorder.

1. Introductions and Announcements

a. Kathleen distributed a recorder schedule for 1998 based on a monthly meeting schedule. She also distributed a basic rotation list to use if we decide to meet less often than monthly.

2. Minutes from the meeting of 11/12/97 accepted as submitted.

3. Richard Amelung was elected by acclamation to be chair of MQCC for 1998.

4. LSO Update

a. Autographics load - Vivian stopped loading Autographics to do the latest BNA load. She is back to Autographics and has finished 3 1/2 of 10 tapes so far.

b. GOVDOCS load - Item records which were loaded October 17-18 did not have a call number type and the machine used the default of 050 (LC) for the load. These call numbers need to be in the 086 (SuDocs) call number index. Action Item: Kurt will figure out a way to back these records out and reload them so that the call numbers are in the correct index.

4c. Open Calls to III that need follow-up:

1. Item records are not displaying in Guicat after they are exported/transferred from OCLC. It appears that we will have to fix these one-by-one but MQCC would still like an answer from III as to why this happened and if it will continue to happen.

2. Both Guicat and character-based MERLIN are still showing deleted item records in the summary display. Action item: LSO will follow up with III to resolve call.

3. Far Eastern Economic Review - Ellis Library item records were missing. Ellis staff put them back manually.

4. Action item: Garry Harris will write procedures for MQCC that describe how staff should handle records that the III rearrange maintenance program cannot handle because the Bib update date is not changed.

5. Action item: George Rickerson will check with UC-San Diego about URL checking software that they have developed that works automatically with III software that we might be able to use with MERLIN.

4d. Inn-Reach/MIRACL update

1. Two sets of profiles are due: OPAC displays/indexing by Mar. 1; Circ profile by Apr. 1. The system will go live fall semester 1998. There will be approximately 3,000,000 bibliographic records in the file.

2. If MERLIN patrons go into central database they can only borrow from Washington U. because the system only recognizes two patrons: Wash. U. and the UM system as a whole. George is looking into changes with III.

3. Master record concept. Prefer MU or Wash. U. record? We want to keep MESH headings. Program uses encoding level to make decisions and we have invalid codes such as "r" for Ellis recon in our bib. records. We need to change invalid codes to valid ones.

4. As of now, 970's will not load. Wash. U. is currently using BNA, but BNA will not allow us to display TOC in InnReach.

5. We will have to look at our BNA fixed field coding in Bcode 3.

6. Inn-Reach looks for the character string "available" to determine that an item is around to be checked out. We currently use "not checked out." We will have to agree to use "available" instead.

7. Our rearrange and merge software will not work in the Inn-Reach union database where new item records appear at the end of the summary display. Checkin records will be at the top of the list and the "Lib. has" field will display to the public. We also cannot do scoped searching in the union catalog.

8. The volume number must be in the vol. field of the item record in order for Inn-Reach to select the correct item from a multi-volume set for ILL requests. This is particularly important for analyzed monographic series that are classified together. The machine will not recognize volume numbers that are part of a call number string.

9. Inn-Reach indexes call numbers from bib. records, not item records. We may want to begin keeping call numbers in bib. records when we are resolving duplicates.

4e. Guicat: Reported problems, Z39.50 to Wash. U. and other libraries

1. Guicat will not print labels.

2. We need to use the report form provided on the LSO Web page to report problems.

3. Washington University has the Z39.50 client software, but loading it is not a high priority. Action item: George Rickerson will contact Wash. U. to see if they can make loading the Z39.50 software a high priority because we want to access information in their bibliographic and authority records and we want to share our information with them.

4. We will pass names of libraries with which we would like to have Z39.50 agreements on to LSO and the MQCC list.

5. Electronic Resources - subject access; report from MRSC meeting

MRSC had concerns about having the genre subject headings only in the keyword index. They were concerned about false drops. They seem to think that setting up bcodes for the types will solve the problem. (Inn-Reach will not read the bcodes). LC will not implement \$v in 650 b4 until they get their new system, but it would be possible for us to start using it and indexing it. For now, we will use the subject guidelines in the standard and apply 655s sparingly.

Janet Jackson was adding the new branch locations codes and she ran into the limit of 900. She is working with III for them to do some processing that would free up space in our location file. We also have the option of deleting some of the codes that we do not need. Janet will try to get III to resolve the problem

first before we resort to LSO staff deleting codes.

Electronic resources standard approved.

6. OCLC Profile for authority records

BNA software will be used until OCLC gets their own in place. We want to hold files until someone from OCLC can come to talk to us about the process. They should have our files from BNA by December 31st. They plan to contact us about profiling after they get our BNA files. We are very concerned about having OCLC process our files without having a face-to-face discussion between MQCC, LSO staff and an OCLC rep about profiling for us. We do not want to have our large local file compromised in any way and we do not want to go through the duplicate record problems that we had with BNA if we can avoid it. We do not want LSO to send any records to OCLC for authority processing until after the above discussion takes place. Action item: LSO will contact Chris Mottayaw to set up a meeting which includes MQCC, LSO staff and an OCLC representative to discuss profiling and service options for the authority service. No records will be sent to OCLC for processing until after that meeting. LSO staff will include an MQCC member in a conference call to set up the meeting. Richard A. will be the designee unless it has to be someone in Columbia for the call technology to work. Questions should be sent to the MQCC list and to Richard.

7. MERLIN Standards

a. Fixed Field Elements for Bibliographic Records (Gloria Ho/Ting James) Approved with changes. Added colon at end of 6.2.1. Deleted Illus element from 6.2.2.1. Deleted AccM from 6.2.2.4 and 6.2.2.5. Anna Sylvester will check with Laura Gayle Green to verify that we do not need to maintain AccM codes in our music records.

b. Bibliographic Records for Music (Anna Sylvester) Redraft. Added information about bound with links to Method 1. Added information about changing 262 fields to 260 so that MERLIN will recognize them.

c. NLM Subject Authority (Jane Addison) Approved with changes. Changed the word "Vocabulary" in title to "Authority." Added link to 5.1.1 under 5.3.2.2. Closed parens in ASSUPPRESS under 5.3.2.5. In 5.3.2.6, deleted "(Old Chapt. 5)" and added a link to 5.1.1.

d. Holdings (Robin Kespohl) Approved with changes. Deleted 7.1.5.1. Changed 7.1.5.2 to read ... more than 5 physical volumes ... Added Guicat instruction to use "n" to designate a note field.

e. Standards for LC Subject Authority File (Gloria Ho/Ting James) Redraft. Changed "splited" to "split" in 5.3.1.4. In 5.3.1.4, added option to keep old headings in bibliographic records with appropriate references in the authority records. Examples under 5.3.1.4: Removed LUMIN labels (SUBJ AUTH, etc.); Added \$a to 150 Nursing; added \$w and \$a to 450 fields; added \$a to 150 Nurses. In 5.3.1.6, edited first two lines to read "Field 667 may be used by cataloging centers to record a local cataloger's decision. Begin the note with the standard statement: LOCAL SUBJECT USAGE." Deleted the example from 5.3.1.6. Changed link from 5.3.12 to 8.2.4.1.2.1 under 5.3.1.8.

8. Call numbers in order records

UMC-Law staff have been creating lists of order records for various purposes and would like to be able to sort these lists by call number in shelflist order rather than character by character as is currently the case. During the discussion which included some online exploration and experimentation in MERLIN, we discovered that it is possible to designate an 050 call number rather than the generic call number when creating a new order record. However, this affects the display and not indexing. MERLIN currently does not index the call number field in order records. We also discovered that it apparently is not possible to change the designation of the call number after an order record is created. Action item: LSO will find out if it is possible to index the call number field in order records and how call number designations can be changed in existing order records.

9. Form of entry conflicts: Example, National League for Nursing series

There are times when various locations want to set up a local series heading for the same monographic series in different ways to accommodate their users. The National League for Nursing series is a good example. For this series, the UM campuses use "Pub. (National League for Nursing)" and SLU uses "NLN publication". An LC authority record says to treat this series as a quoted note. "NLN publication" conflicts with a valid heading that LC has set up for a different organization. MQCC agreed that it is possible to use different forms of a series heading if no consensus can be reached. After much discussion, two options for authority records for this situation emerged. 1) Each series gets its own authority record with reciprocal 5xx fields in the records. 2) A single authority record is created with the "authorized" form in a 1xx and the other form in a 4xx field. Both forms of the heading would need to be used and retained in bibliographic records for titles owned by locations using different forms of the series. Linda Hulbert will decide whether she wants to create a separate authority record for SLU's version or add a 430 to the existing series record set up by UM. If she chooses to create her own record, the series needs to be qualified: NLN publication (National League of Nursing).

11. Spine label settings

Ellis Library has been using MERLIN to create spine labels. Formerly, we could set up only one format for monographs. There is currently a format set up for Ellis. Under Rel. 11, we can have more than one format for monographs. Batch printing is another new option. Currently, there are not enough queues to handle all of the accounting units. Up to 5 queues are possible. We would like to have at least one queue per accounting unit. We were surprised to discover that location is not one of the options for sorting or designating batches. Location is definitely important to us. Action item: Robin Kespohl will formulate a list of question for LSO to ask III about format options and batch printing capabilities for spine labels.

14. New IMESSAGE code for Depository (GPO)

The SLU depository is about to be evaluated by GPO and the process is becoming more and more automated. Linda Hulbert is looking for a way to code MERLIN records so that a list of GPO depository materials held by SLU could be generated quickly and efficiently. Linda was reminded that the IMESSAGE displays in the public mode, so it will not work for this. We went through all of the options in the item record fixed fields and then to bibliographic record fixed fields. We decided to create an I-type code in the item records for these items. Linda will come up with a list of I-types for GPO depository documents.