MERLIN QUALITY CONTROL COMMITTEE MEETING

FEBRUARY 9, 2000

Presiding: Norma Fair (UM-ELLIS)

Attending: Allison Holdaway (UMR), Janice Carter (SLU-HSC), Jean Eisenman (UMR), Janet Jackson (MCO), Geoff Swindells (MU-GOV DOCS), Gary Harris (LSO), Patrick McCarthy (SLU-PIUS), Anna Zaidman (SLU-PIUS), Pat Logsdon (WASH U), Darcy Jones (MU-LAW), Christopher Gould (LSO/MCO), Rachelle Leutzinger (UMK-LAW), Wendy Fritzel (MU-HSL), Vianne Sha (MU-ELLIS), Alla Barabtarlo (MU-ELLIS), Kathleen Schweitzberger (UMKC), Richard Amelung (SLU-LAW), Ellen Grewe (UMSL) recorder.

1. Review minutes of December 8, 1999:

In all instances, use Christopher rather than Chris when referring to Christopher Gould. Nancy will move the new action items to the end of the action items list. In the list of attendees, SLY should be changed to SLU following Patrick McCarthy's name.

2. LSO Update:

Gary wants to install a new Merlin computer this summer in order to upgrade Laurel in anticipation of the installation of III's Millennium system. He has requested price information from III and is still waiting for a response. Although the serials and circulation Millennium clients will become available, it does not mean that we must use them. Not everything in the circulation system will be ready initially. Only check-in and check-out will be available. The Millennium serials module requires editing to be done in MARC, if the title is checked-in initially in MARC. Additional information about the Millennium serials system garnered from the upcoming Innovative Users Group Meeting can be discussed at the May 31st Merlin Acquisition and Serials Committee meeting.

A contact at OhioLink sent Gary information about the specifications that they used when they recently purchased a new machine from III. After comparing those specs with what we have, Gary believes that our current INNReach software is the same as the new machine purchased by OhioLink. This same software is also on the Mobius machine. Gary has not had time to really check this out, but he said our vendor makes changes to our software and does not always notify us.

Patrick asked if we could do something about review files after the upgrade to the new machine. Gary replied that he did not see why we could not go ahead and purchase more files after the upgrade. Jean recalled that it was the intention of the Library Directors to purchase more files. George did not want to add them to the old machine, and he did not promise to purchase more files but he was open to the possibility. Richard was also under the impression that more files would be purchased after new hardware was installed. It was noted that all review files were in use yesterday. People

are probably using them more often as they become more knowledgeable and experienced in creating files. Richard suggested that only necessary work with review files be done during the month of June when there is heavy demand by Acquisition departments.

LSO's contract with Mobius says that LSO will develop a Web page similar to the one for Merlin that lists available resources and committees. The address is: htt//sequoia.lso.missouri.edu/mobius/staff. A password is required.

Gary said that LSO staff have done an outstanding job in developing Remedy a central call tracking system that has help desk applications. Morenet has also been involved. Remedy will take the place of the current Action Items lists and will be available by the end of the month following LSO staff training. In Remedy, when the help desk receives a request, a ticket number such as MCO-000250 is generated. This ticket number is used in tracking the progress of the request. A URL with the ticket number will be e-mailed back to the requestor, so that he/she can see to whom the request was assigned and the current status of activity. Users cannot review calls unless they know ticket numbers. LSO can review all calls, but other users cannot. The system is still in beta testing so more helpful features may be added later. The previous Action Items lists have to be changed manually. Janet will add information and ticket numbers to those lists as calls are closed/completed and transferred to Remedy.

Christopher:

Christopher handed out material that answers "What does WLN do for us?' They do put the .a number in all our local records. They have finished rebuilding our history file. They are currently updating their hardware and then they will start on our 1st back file and then our 2nd back file and then supply us with new authority records. He recently sent our deletes files. WLN sent various reports that Richard volunteered to review and to do whatever needs to be done. Christopher's previous strategy to back out files failed. He has created a new strategy.

The early problems with MESH were corrected. The MESH 2000 edition is now available. After discussion it was decided to keep what is in the database now, and have WLN send only what they have not already sent. Vianne reminded Christopher that we do not want 155s loaded.
Christopher was given the okay to backout the authority records using his new strategy. WLN will begin processing before the end of the month.
Question: In WLN's "Report of deleted and replaced authority records" will we get to see the local heading that is replaced as well as the new LC authority record replacement? Christopher will inquire.

Janet:

Guicat backspace does not work all the time. Vianne said the vertical tiles or half screen displays do not work for her, but they seem to be okay for Kathleen. Kathleen and Vianne will compare settings to see if they are identical, and will get back to Janet.

Vianne noted that a display problem that had been present in Guicat is also

in the character-based display since Release 2000. Suppressed authority
records show up in groups of entries rather than displaying on a separate
line. This gives the impression that there are multiple authority records
and no bibliographic records. Janet will contact III.

3. Review of action items.

Christopher said that action item 2016 now MCO-000191 would cost us
re-indexing fees. III can make 2nd indicators in 1xx, 4xx, and 5xx fields
in authority records obsolete, but since III does not require MARC
standards, we would have to pay to have it done for us. Richard overheard
Jerry Kline say that clients will be allowed to do their own indexing just
as they are being trained now to do their own load profiles. Gary will
check to see if this is coming, and if so we can probably wait. Gary might
be able to meet with Jerry Klein or other appropriate III staff at the
upcoming IUG meeting. Richard expressed interest in being included if a
meeting is scheduled.

Following further discussion about Remedy which is Web based and its
browsing requirements and limitations, Gary proposed that Remedy track what
LSO is responsible for and the textfile Action Items lists track committee
assignments and members of committees assignments. Changes in the textfile
will have to be done manually by LSO staff. Committee members can send LSO
any changes that they want see made on the textfile Action Items lists. We
will try this and see if it works.

4. Report from GPO records committee

Vianne said proposals arrived late for UMC committee members.

Gary volunteered to contact Purchasing for the following information:

a.) Can the February 15th deadline be extended? Answer: Yes.
b.) Can we contact the vendors directly? Answer: Yes, in writing or by e-mail.
c.) Should we be concerned about extra costs that vendors say they do or do
not charge? Answer: No, do not consider costs in evaluating.
d.) Are there sample records? Answer: Yes, Gary will load them as soon as
he gets them.
e.) Are there references? No answer yet.

After discussion there were still numerous questions concerning the
vendors' shipping list services, how holdings are set in OCLC, and what
options are available for printing labels. Geoff volunteered to contact
vendors for more information by e-mail and copy to Committee members.

5. Report of 856 Committee.

Patrick:

The Committee looked at both public and technical service issues when
discussing what the 856 should include to be both user friendly and easy to
maintain. Some committee members wanted a simple display that was easy to
interpret, but other public service staff wanted complete information.
There are no agreed upon standards, but the expectation is that we will

continue to include the libraries that have holdings, the coverage information, and the URL. The Merlin record, rather than the Mobius record, will often be the more complete record. The 856 cannot be suppressed in Mobius. Each library will continue to be responsible for their own holdings information for the OCLC ECO titles.

6. First indicator value for multiple surnames.

Kathleen has created review files of more than 82,000 bib records with 1st indicator 2. Her staff will change these to 1st indicator 1. Current cataloging should use 1 and not 2 for multiple surnames. Change authority records as you hit them. Do not go searching for them.

7. Merlin standards and guidelines for authority records.

Norma:

Did we have a procedure in Merlin for series that were not traced or are series-like phrases? A scan of the standards did not find one. Norma will write up standard 5.6.3.

Since there are still a lot of unanswered questions about authority control, Gary suggested setting up a conference call with WLN and Christopher, Richard, Kathleen, and Norma. George and Linda's phones can accommodate up to 6 people.

RECORDER: Ellen Grewe, UMSL

Next meeting: March 8, 2000