

Merlin Quality Control Committee
Minutes - July 19, 2007

Attendance: Jessica Longaker (MU-Law), Christopher Gould (MCO), Kathleen Schweitzberger (UMKC), Carol Riley (UMKC), Rich Rexroat (UMC-Health Sciences), Felicity Dykas (MU), Wayne Sanders (MU), David Owens (UMSL), Rebecca Moorman (UMSL), Renee Crandall-Witte (UMSL), Mary Aycock (MU), Maggie Trish (UMR), Allison Holdaway (UMR), Nancy Stancel (UMKC-Law, Recorder)

0. Approval of minutes of March meeting, Announcement, Introductions

Minutes Approved/Announcements

MCO - C. Gould is experiencing MERLIN slowness problems too when he's trying to run reports. Increase in time delays have increased since the installation of the new servers. This has been an issue for six months. III has finally assigned the appropriate person the ticket. MERLIN is maxing out its disk speed due to high activity. The system can't keep up with the read/write function. MERLIN has double the users than other clusters so it's double the work (360 logins). MCO upgrades the servers about every 5 years. The current servers are one year old.

There are two possible solutions for this:

- 1) do work on the software side and move III air log files around. Christopher doesn't know if this will work. There would be no cost for this.
- 2) MCO can purchase an additional 72gig disk (Sun 2 x 440) for the server but we don't know who would pay for it. This would increase the disk size by 1/4 or 1/3. Would that be enough to make a difference?

Both options require downtime and there is no time frame for implementing either option. MCO would like to go with option 1 while it investigates option 2. CG wants it done ASAP. The work could be done on a Saturday or overnight (MQCC's preference).

MU - It stopped approval book orders for the summer because of financial constraints but will begin to order again in August. It has a 30% cut in its monographs budget and is set to cut serials in the fall. Mary Aycock has joined MU from Rolla. There will be a new cataloger, Jee Davis, starting in August. Ann Riley has been hired as the Assistant Director of Technical Services. MU has a new NACO person in training (Wayne Sanders). He does not have a reviewer assigned as of yet. MU has an application pending for full membership in NACO. LSO has moved out of Ellis Library and is now located at 10th and Cherry as of last weekend.

UMKC – Its open cataloging position has been placed on hold for this fiscal year due to the Curators' mandate to campuses to come up with an additional 1% funding for salary raises.

Rolla – It is interviewing for a cataloging position and it's hoped that the position will be filled by September 1st. Their campus has signed a contract for ExLibris for E-Resources and Maggie will be preparing the records for loading once she is trained. ExLibris underbid Serials Solutions. As

of January 1st, 2008, UMR's name will be officially changed to Missouri University of Science and Technology.

1. Agency software

K. Schweitzberger and F. Dykas will take MQCC's recommendation to MCDAC (7/20/07) to delay the implementation until summer 2008, with any implementation pending a III resolution of issues with the display of the URL in the MOBIUS Union Catalog. There were several issues identified on the MQCC Wiki. C. Gould - 856 display issue: III didn't see the problem as a problem but the clusters are unhappy. MCO made an error in its recommendation. MCO had a conference call last Friday morning with III and got them to see the problem. Greta said she'll look into resolutions. There was another conference call right before the MCDAC meeting. The 856 is on hold but the use of agency codes is not on hold. There will still be a display issue with the 856. For example, if we have four links on a bibliographic record, the first location to add an item to the record, the holdings will display as if all of the URL's belong to that one location. The MOBIUS Executive Committee decided to go ahead with applying agency. MCO has remanded its recommendation to remove 856s in bibliographic records. All 856s will remain in bibliographic records and the 856s will be copied over to item records if we decide to go this route. There is no expectation that cataloging centers will need to maintain a URL in two places (ie. in the bibliographic and the item record). The "Pick up Anywhere" and "Request to Own Site" is a separate issue and this is being turned off until August.

856/956 discussion:

Is III developing it as a product, rather than as a standard? There has been no discussion yet on this. MCO is asking III for a proposal on how to copy URLs over. There are two options.

Do we want our whole collection on MOBIUS? There is some evidence that patrons may start catalog searches at the MOBIUS level rather than at cluster level. Some reference people do this as well. On loads, would a second URL item record be loaded? CG thought this was a good question. MCO would make a profile change so it's done automatically. For MARCIVE records, we were getting duplicate item records for electronic records because it produces a new record. UMKC changed its profile to prevent the MARCIVE load from loading duplicate new records. That will be a problem for MERLIN. MCO can't overlay multiple item records through a single load. CG thinks that we are the first installation to deal with this issue. It would also affect Serials Solutions. CG deletes the previous month's brief records. Should we recommend that this will not be done?

The other confidential option is not to contribute item records for MOBIUS. The resulting display will be exactly what we have now. Subfield z's can be changed to display our site. With no better III solution, MERLIN liked option two better. It's also a uniformity question--how would display work if clusters decide to do it or not, and, what happens in MOBIUS displays?

MQCC—It would like to delay this decision until May 2008 in order to review the installation of agency and until III has other solutions. III is fine in halting implementation to whenever we want with a date to turn on Pick up Anywhere in August 2008. There is no additional cost while we're waiting. The other option is not to contribute item records and have a cluster holding display rather than individual site holdings displays.

K. Schweitzberger--Agency was purchased for MERLIN. Could we purchase one additional agency code and call it UM? Other clusters will have this same issue as well. C. Gould— purchasing ten additional codes for each cluster would cost us \$85,000 which is double the initial cost. A cluster might consider purchasing it on its own for \$8,500.

2. Review Outstanding open MCO Tickets (UMSL)

The exporting of duplicate OCLC records may be related to Millennium slowness. Neither OCLC, III, or MCO is taking responsibility. The duplication of downloaded OCLC records occurs when you are waiting for a system response message. This was also an issue in the Voyager online system. In that case, it turned out that it was an OCLC Connexion problem. Michael Bland (Head of Library Tecnology Services-UMC) and C.Gould will discuss this further.

The order of the checkin records MCO ticket has morphed to item records not organizing themselves in a rational way. Records are grouping but it's not making any sense. This happens in the public view. The staff view is OK. For Rolla, it's not grouping correctly by location code or location label. The ticket is still outstanding. It sounds like this is a web OPAC issue with WebPac Pro. We need to make MCDRSC aware of this since it concerns a public display. Items should display alphabetically by the location label. MQCC would like active and inactive checkins for an agency to display together.

Records will be coded full level. Do we want to call our records CONSER records or not? You no longer have to code for Fixed Fields for frequency, regularity, conference publication, etc. Should we continue using the Fixed Fields that we have in MQCC standards? If we do code, during loads, that information will not be carried over. CONSER is using the 310 now for this Fixed Field information. What does MQCC want to do with MARCIVE records in this case? We don't have time to examine each one of them. For uniform titles, we no longer need to distinguish print from online. MQCC decided that we will accept the CONSER standard since we can't control it for record loads. This issue needs to go back to our public services people to see if it's OK with MQCC's recommendation. There was consider discussion about conference proceedings.

3. CONSER Standard Record and udates to MQCC standards (UMC)

MQCC members will review the standards with public services people to determine if there are issues with accepting the CONSER standard record. Of particular Interest, coding of Fixed Field frequency, regularity, and conference publications (See the meeting Wiki for other changes).

4. 79x – Indexes (UMC/UMKC)

Other local fields are now enabled and we need to get them in the index for MERLIN. Felicity will send a ticket to MCO. Rolla will use the 790 tag for advisor on theses. These records will not be coded to go through authority control. These will show up on headings report as “First Time Use.” They will also show up on the Invalids Report” if it matches a see-from, or if an authority record comes in after a bibliographic record is loaded, or if an authority record is updated. If there is a conflict you need to correct it or send it to the appropriate cataloger if you do not have the needed

information for correction. This information will be added to our cataloging standards. Sites should now include a subfield |5 to identify who worked on the entry.

5. Checkin record standards for monographs (UMSL)

UMSL (BRIDGES too) - holdings standard allows you to code lending practices in the checkin record and send it to OCLC. OCLC can then deflect requests for items that you do not lend. For monographic multiple volumes sets you can indicate missing volumes. MQCC needs to create standards for this. This information does not display to the public in MERLIN. This might be a local campus decision. If it doesn't meet our standard for checkin records, we should suppress it. This will affect groupings for financials. For local holdings records we could ask staff to add local holdings information and then suppress the records to get holdings information into OCLC. The question came up as to whether we should enable our notes fields in item records for a public note. MQCC thought this could be useful. M. Trish will work on a public notes document for item records. F. Dykas will get information from the OCLC Union List staff about holdings information and whether it can be uploaded from item records.

6. Status of webpage for MCO Help Desk RMO's (UMSL)

The page was taken offline and the RMO has not been officially completed. The focus next year will be on operations and the Help Desk. F. Dykas will send a message to MCO asking to reinstate the page and have them place a message on it stating that it's under review.

7. LHR issues (UMSL)

Format comes from the 007 in the Local Holdings Record in MARC format. Location goes into the 852 |c. The LHR summarizes all holdings and can provide an additional 3 separate holdings. UMSL is using the last bound volume note. At our next meeting we will ask UMSL and UMR to show us how they are updating holdings this way. If you go through MERLIN, the summary automatically updates.

These updates are sent quarterly (February, May, August, and November). The information is case sensitive so MQCC will standardize this practice by using all capital letters. Do we pay to update holdings? No, not anymore once OCLC changed its pricing structure. UMSL asked if the loads could be done more frequently than quarterly, perhaps monthly, and could the cluster itself do it rather than MCO? Christopher said this might be possible. D. Owens will look into what the cluster would need to do to load these.

There is an issue with the 843 note. In III, it displays as an Identity field that is arbitrarily assigned. In MARC, it's a reproduction note that displays to the public. III could assist us by changing the use of the 843 field and map it to a notes field. D. Owens will look into what we need to do to change MARC tags associated with III's Identity field.

The 852 |z is mapped to the 843 in the LHR itself. It doesn't map correctly in MARC. R. Moorman will look into this and contact Buddy Pennington at UMKC about this issue. The 007 is created automatically if you do not add one.

8. Records loads (UMC)

MERLIN would like to explore possibility of doing its own record loads and batch uploading of holdings to OCLC. Christopher will take this idea back to MCO. One issue is that MCO can't have more than one record load going on at a time. It's a possibility that MCO could train one MERLIN member in data exchange loading and certify them in this. The acquisitions approval downloading of records does not impact the batch loading of records by MCO.

9. Authorities and Reports (UMC)

For headings in MERLIN that are in conflict with authority records, MQCC decided that staff may change headings without notifying other campuses. Staff will contact the appropriate agency if more information is needed to resolve the conflict. MQCC staff will continue to work on SLU blinds as they have time.

Sites are finding 4-25 errors from 2,000 records on backfile reports. They are finding that many authority records were missed being loaded. The 740's are not controlled and UMKC ignores them. 505's and 970's are also coming through. Christopher says that III Release 2007 will have an enhancement to remove 245's from the headings lists. On authority change reports, staff can't see what was changed so it's not very useful. MQCC discussed the headings reports it gets and decided that it can ignore 245, 246 and non-unique 4xx fields.

In reviewing SLU blind records, there are 5-7% of records that need to be kept. The bib records often are not matching the authority records once SLU's records were pulled out of MERLIN. Bib records often do not reflect dates.

C.Riley will work on a way to identify old duplicates and pull them into a report. Then we could suppress then unsuppress them in the catalog to clean it up.

On the weekly headings lists, some are checking the 682's. This will be added as a topic item for the October meeting.

GPO only does authority work for corporate names. We need to check personal names on MARCIVE records. Serials Solutions records are not being sent (no CAT DATE). Kathleen works on these for UMKC. First time use reports are important to UMKC because of its music collection. MU does not send these.

The RFP is due back August 19th for a new authority vendor. The week of August 20th, the RFP will be gone over and a recommendation made.

10. Relator codes (UMC)

These will be more important in the future. We discussed using MARC relator codes (|4, not the older |e relators), but will not pursue mandating their use at this time.

11. SHS and WHMC (UMC) – No Action

MU is doing all the reports for SHS which has no representative on MQCC. Who is checking the cataloging for quality? Where does it fit in? When WHMC moves into the MNL at UMKC, this may become an issue.

12. E resources – unsuppressing items (UMC/UMKC) – No Action

We would need to recode these so we'll table this until the October meeting. Will we want to upload these records into MOBIUS?

13. 655 (UMC/UMKC)

Since LC is distributing genre authority records, can a new vendor control these OK? Do we want to pay for a direct, separate index? MERLIN would have to pay for it. This should go to the PS people for discussion. These headings are widely used now. SLU separately indexes 655s so we can demo its site to our PS staff.

14. Bib Lvl (UMC)

This is not in sync with OCLC—mono vs. serial. It has to map as it comes into MERLIN. Should we add other code values to MERLIN? F. Dykas will get information on the implications of using all Bib Lvl codes as coded in WorldCat. In Millennium, the only defined values are “-“ (undef), “m” (book) and “s” (journal).

15. IR on campus – Deferred

16. IUG reports and MOBIUS Conference reports - Deferred

17. Uniform titles for online resources (UMC-HSL/UMKC)

MQCC will consider always adding a uniform title with a qualifier (“Online”). When icons are implemented in III, this will take care of some of the confusion.

18. MQCC documentation etc. on MCO site (UMC/UMKC) - Deferred

19. Suppressing fields in bibliographic records (UMC)

MQCC members will get input from PS staff about fields that they might want to suppress from display. Why not suppress the 246 since the 229 is maintained? Another similar possibility would be added entries used to compensate for III's difficulty in distinguishing between initial articles in one language which are not initial articles in other languages when used in titles and series. We can open a call to MCO to do this. It won't be a change for III. Public services staff need to be informed of this discussion.

20. OPAC improvements - Deferred

21. Icons - Pending

How are we going to select them and code for them? K.Schweitzberger will send out information about this.

22.Limiting in OPAC and Internet – Pending

23. Media Management Software request - Pending

24. Link checking for items with proxies - Pending

25. MCDAC Authority RFP Task Force - Pending

26. Scoping changes – Pending, almost done

27. Updating MQCC standards – No discussion

28. Location display text for –eResource items - Completed

29. Other issues and questions and concerns – No discussion

Next meeting is scheduled for October 10, 2007. UMSL will be the next recorder because UMR substituted for UMKC at the previous meeting.

Respectfully submitted,

Nancy D. Stancel, UMKC-Law