

## MOBIUS Catalog Design Advisory Committee

July 20, 2007

1:00 p.m.

Attending: Jim Dutton, Adrienne Detweiler, Janine Gordon, Christopher Gould (MCO); Carol Bennett, Jean Rose (Archway); Jean Pace (Arthur); Kathy Nystrom (Bridges); Carol Harper (Galahad); Steve Wynn (Committee Chair, LANCE); Chris Dames, Felicity Dykas, Diane Hunter, Kathleen Schweitzberger (MERLIN); Natasha Grando, Qhyrrae Michaelieu (MRRL); Margaret Smith, Anna Zaidman (SLU); Donna Bacon (Springfield-Greene); Gwen Gilpin, Phyllis Holzenberg (SWAN); Andrew McGarrell (Towers); Pat Logsdon, Mark Scharff (WashU); Dennis Goodyear, Ted Ostaszewski (WILO).

**1. Minutes:** The minutes from the meeting on March 9, 2007, were approved as written.

**2. MOBIUS update:**

- An ad is out for the new Information Resource Manager position
- MCO submitted 2 “course” descriptions for practicum students for the users’ services and help desk units
- MOBIUS/MCO websites are being redesigned by Abby Rimel, working on the new server; estimated completion: March 2008
- A Training Catalog is available on the MCO website under the News and Training tabs; it includes training schedules. Additionally, MCO’s subscription to Centra will expire at the end of 2007 and be replaced by a less expensive product for distance meetings or training sessions. Regional and then online trainings will be scheduled for fall.
- 1000 new delivery bags have been distributed; 2000 more (larger, heavier) will be shipped 7/20.

**3. Introductions/election:**

- 26 people around the table introduced themselves, their institution and cluster, and their status as delegate or alternate, incoming or outgoing.
- Steve Wynn was unanimously re-elected as chair of MCDAC

**4. Agency software:** Jim noted that Agency will be paid for by a LSTA grant from the State Library; MCO began working on it in March 2007. Its primary attributes are that requests, pick-up-anywhere, and statistics all represent individual institutions, not clusters, in the central catalog; it should have no effect on cluster or individual library catalogs. Janine and Christopher, heading up the project, discovered the 856 URL link problem when testing SLU holdings (the SLU “cluster” was set up as a multi-agency site). They discovered that, if the URL link is in the bibliographic record, the “head” agency is listed first, even if the link properly belongs to an individual library. Only the first URL link from item or checkin records displays, even if there are many attached to the bibliographic record. If links are in bibliographic records and item records, the resulting display is alphabetized based on cluster (bib URL) or library (item URL), greatly separating, for instance, holdings of Truman within the LANCE cluster. It also only displays the first contributing library, whether of paper or electronic holdings; this is a “bug” that III will

fix. Additionally, the link from the “master record” is what displays in the link “box” at the head of the bibliographic record, even if that’s inappropriate.

Discussion centered around the problems inherent in copying URLs in bibliographic records to item records:

- There are thousands-- how could they correctly be identified and added to appropriate item records?
- How would they be monitored in the future, since the III URL checker doesn’t work with item record URLs?
- The resulting catalog display requires patrons to click into “display holdings”, rather than clicking on the first display screen, adding a step to retrieval
- SHARE item records present a different problem in that any URL carried to the INN-Reach display needs to be attached to a specific agency—not to several at a time—so a huge conversion would be needed initially and multiple item creation for each freely available title added thereafter

This discussion led to a formal and unanimous recommendation that will be sent to the MOBIUS Executive Committee. The text of the recommendation can be found at the end of these minutes.

Beth Fisher, MOBIUS Executive Director, called on speaker phone. While talking about the Agency software, the lack of communication among the advisory committees (MERAC, MCDAC, MCAG) to whom Agency information was sent came up. Each committee has a closed listserv. Beth directed Adrienne to set up an inclusive advisory committee listserv, so matters of concern to more than a single committee could be more easily discussed. Beth discussed the process involved in getting new system-wide software, and Kathleen brought up the fact that MOBIUS’s cluster structure is unique among III library systems and, therefore, requires more and different testing before adopting new products. Steve read our finalized recommendation to her, and she agreed with the points.

5. **RFP for ongoing authority control:** Jim mentioned that the RFP compiled by the MCDAC RFP committee had been returned by the procurement office and would be sent out for bid today to Marcive, LTI, and Backstage. Responses are due August 19. Kathleen will continue on the RFP committee (whose responsibility should end within a couple of months), although she is an outgoing MCDAC representative.
6. **EndNote:** Truman had requested that some lines (year, secondary author, place published, publisher, custom1) be added to the EndNote display in INN-Reach, to match Merlin’s display. This has been done and now needs to be tested by users.
7. **New products/functionality:** Jim noted that III’s Local URL is a new product, soon to be available. It seems to work very similarly to the 856/956

enhancement that MOBIUS has requested several times in the last few years, but it's a product that will need to be paid for. He also mentioned Release 2007, which will include new printing functionality; no date for release yet.

**8. Request this item link:** Kathy brought this concern from Bridges.

Placement of this button on the first search screen means that patrons can request an item before seeing where copies are located and whether or not they're requestable. Suggestions for improvement included: 1. removing this link on the first screen of search results, leaving it only on the second screen, which displays holdings prominently, or: 2. having search results display only on the second screen, completely eliminating the first screen. Jim will check into what's possible.

**9. Clickable location codes:** Currently, when you click on an underlined shelving location in a holdings display, a pop-up box frequently lists several libraries to which that holding might belong—even though the shelving location description is very clear and specific. It's confusing to patrons to see other locations listed in the pop-up box, although there is an explanation: **This resource is in the collection of one of these Missouri institutions.** Libraries appear in the pop-up box based on the fact that they all have location codes that begin with the same two letters. This problem may be alleviated if Agency is implemented, because each location code will begin with a "9" and will not conflict with others. As it stands, the display in the pop-up box can't be changed, but the box can be eliminated entirely. Representatives were asked to query others in their clusters about disabling this feature. The issue was tabled until the next meeting, at which time more should be known about the Agency software, as well.

**10. Webpac Pro on MOBIUS:** When should this software be implemented in the central catalog? Have all pros, cons, and problems been identified through cluster implementation? Chris Dames will chair a task force to look at the issues and propose some decisions before central implementation. Jim and Adrienne reported that it would take III about 6 weeks to implement it, and there would still be a lot of fine-tuning to do by MCO staff, who are currently still working on full cluster implementation. MCDAC representatives are to ask public services people in their clusters within the next two weeks if they'd like to join Chris on the task force.

**Next year's meetings will be:**

**11/16/07 Centra**

**3/7/08 Centra**

**7/18/08 Columbia at MCO**

## **MCDAC Recommendation for Agency Software**

The MOBIUS Catalog Design Advisory Committee met July 20, 2007, and discussed the implementation of Agency software. The Committee found several problems with the way Agency software handles links in catalog display. MCO's recommendation of June 20, 2007 for resolving these problems is also unsatisfactory for several reasons. First, the recommendation would be extremely burdensome to implement, due to the very large number of records that would have to be converted. Second, the INN-Reach software only allows one URL per item or checkin record to display in the catalog. Third, the recommendation does not work with other III products, for example the URL Checker. In view of these problems, MCDAC recommends that implementation of Agency software be postponed until these problems are resolved. MCDAC recommends:

1. Ideally, URLs should be drawn only from bibliographic records for display in the MOBIUS catalog and should display by agency;
2. If URLs must be copied to item or checkin records, there should be a plan for automatic conversion so that manual conversion can be avoided;
3. If URLs are stored in item or checkin records, III should allow all URLs from an item or checkin record to display in the MOBIUS catalog;
4. Any conversion of data should comply with MARC and other cataloging standards;
5. Any implementation should be compatible with other III products, for example III's URL Checker;
6. As a possible solution, MCDAC recommends that MCO explore III's new product, Local URL.

In addition, because of MOBIUS's unique cluster configuration, MCDAC recommends that MCO request that MOBIUS be a beta site tester for future INN-Reach products.