

**CLC Advisory Committee Meeting
Livermore Library, UNC Pembroke
Feb. 24, 2009**

Attending: Madeleine Bombeld, Arlene Hanerfeld, Matt Lawson, Dan Pfohl, June Power, Jean Sexton, Susan Whitt, Rob Wolf,

1. Maintenance Split Update – Dan thanked everyone for getting their inter-institution funds submitted – the invoices have been paid. He stated that next year there would be one invoice for UNCW, who will then send out inter-institution invoices for each institutions portion of the bill.
2. Syndetics functionality (ISBN/OCLC number searches) – This is still an open call. Dan tried to implement this functionality, but it is horribly slow and bogs down the system. This slow response time is not necessarily Innovative, but could be Syndetics. Arlene noted that we are paying for product we're not able to use. Dan will follow up.
3. ERM, CASE, WebBridge – A meeting will be held to specifically address Serials related concerns at UNCW end of March. UNCW has made good progress in setting up their profile and getting their coverage load into ERM. UNCP is working on it, and it is going pretty quickly. Rob noted that 80% of the coverage load is correct and 20% needs to be corrected.

Discussion took place as to which edition of Science Direct was being used for the coverage load. Dan noted that the Science Direct College Edition is easier to work with when creating the profile. UNCW has a call into Innovative about Science Direct. UNCW had recommended that III create profiles for the Carolina Consortium packages from Elsevier and Wiley. Since CASE can't determine what the Carolina Consortium holdings are, each institution will either have to select larger packages and then deselect the titles we don't have, or select titles one by one. Dan recommends the former.

Rob noted that he is having a problem with the Sage Backfiles, as neither choice matches our collection. Dan is trying to get information from III about these special packages and getting more coverage loaded. He also has another call into III about the embargo function.

a. CASE Profiling

- i. Should e-books be included? There was a discussion, and while some questions were answered, many more were brought up. How do e-books fit into this model? Whether or not we include them in the CASE coverage load depends on several things, including whether e-books are cited in index/abstract and other databases and whether the databases can configure OpenURLs to send the citation info through the link resolver. There has been a lot on the listserv about this topic. Rob saw Books 24/7 as a downloadable batch, but loading the records in CASE would probably be less efficient than loading the MARC records that come with the collection. Advantages would include that it would be good for WebBridge and with the link resolver. However, what happens when collections increase? What about ebrary? It was noted at this point that

ERM would be more for books within databases. How many ebooks are referenced in citation databases? Should we match on ISBN from CASE? netLibrary has MARC records packages in CASE, should they be used? Dan will see what the match point is for the records. Arlene asked if it would create a checkin record? The answer was that it could create check in record with a link in it. Rob thinks putting them in ERM will increase visibility. It was asked if ERM will keep URLs separate for the consortium? Arlene stated that we should get serials mastered before moving onto ebooks. Susan asked what is time frame we are working with for these records? Are there any limits on bib or item records? There are no limits; there is not even a limit on check in records with ERM. Now order records are the only things that have to be purchased. Dan needs to request more bib records. Will UNCP and FSU be duplicating records if they both add their MARC records for ebrary? See 6b Uploading MARC record for further discussion.

- ii. Embargo function in WebPAC. – Dan stated that when data comes from the vendor it includes text to indicate the embargo date, which needs to be translated into the appropriate number of days for coverage load. However, dates not being translated correctly. The ending date is not being read – only the starting date. Dan noted that there is a webpac display problem. He said that manually switching the date works, so he is trying to figure out why this is not occurring automatically as it was before release 2007.
- iii. Identifying and requesting new packages. The question was asked if a file is requested twice in a row, does it overwrite the file the second time or create a new one? Dan thinks it overwrites but will check with Rebecca.

b. Coverage Load Issues

- i. Profile package peculiarities – Almost every package has some peculiarities and most have to be massaged a little to work. Dan noted two different angles to massaging the data depending on what you want to do. The package can be used and particular titles deselected *or* select title by title and don't use the package.
- ii. Record creation/matching – If an ISSN is not found during the load, the record will attach to book records of the same title. The suggestion was made to put all journal records in a review file to speed processing when changing coverage date in CASE, so that it only has to be done one time.

- c. What FSU and UNCP can begin doing for implementation – Continue planning. Rob is working on UNCP's profiles, FSU will begin looking at their CASE profile, and UNCW has documentation to share including setting up templates. UNCP is ready to load records and test functionality. It was noted that small databases like Psych Articles work best for testing.

- 4. Password Security Update – Dan hasn't yet had a chance to work on this system security issue. He noted that we need to update passwords regularly – both module logons and personal authentication passwords. Dan needs to work out the logistics and use some of III's new functionality. There have been mixed reviews on the password function on the listserv. It

doesn't work as described in the manual and so we still have to use text based system to change password.

5. WebPAC Pro

- a. DISPLAY_856 (open link in new window) is now working, per our agreement at the last CLC meeting and Ill's workaround.
- b. Dan customized patronview_web.html to show both the number of checkouts and holds.
- c. Proposed "Cite this from OCLC" button – Do we want to move forward with this feature? It is a button with java behind it, that when a patron pulls up a catalog entry it will properly format the citation. The question was asked if it will allow for different citation styles. Dan noted that it doesn't work well with media items. It was suggested that this feature be added to the test server for public services evaluation?
- d. Dan stated that the suggestion link can be rerouted to Drupal web forms for each institution, bypassing the Millennium form. If FSU or UNCP wants to use this method, Dan will help set it up. The major advantage will be the ability to identify the origin of the request. Ill's suggestions (not purchase a title but general suggestions), make it difficult to know the origin as they all go into one pool. So if a patron is making a comment about the library's environment, for example, it would be difficult or impossible to determine the library they were referring to unless they specify it themselves. Using the Drupal method would split suggestions so that the requests go to the appropriate institutions. So rather than using Ill's form, UNCW created a form in their Drupal environment. This enables the ability to tell where request originates so that the form is automatically routed to the appropriate institution. It was suggested that the word *optional* be added to the form after non-required fields. June asked where do forms are delivered? Who receives the forms? At UNCW, Madeleine Bombeld receives the suggestions by e-mail and responds to each accordingly. So far she has received three, and each provided contact information for her to be able to respond. She noted that it is one more way to reach out to patrons. Right now the link is going from the web pages to the suggestion form in Millennium. If we change this and UNCP and FSU adopt the Drupal method, Dan will need to create an interim page for patrons to select their appropriate institution, as for ereserves, ill, etc. UNCW will eventually like to have a web page with questions and solutions given – an electronic version of the bulletin board with print suggestion forms posted. A way to review on the Drupal management side for compilation purposes is being investigated. The question was asked if UNCP/FSU need their own Drupal environments? Dan's answer was, no – they can use UNCW's which runs on Windows. Drupal is a web content management system. Dan suggested FSU and UNCP take a look at it. If we try it and like then Dan will then make changes in catalog, but will hold off until then since there are a lot more changes to make there.

6. Cataloging Issues

- a. Duplicate record update. UNCP staff was going to add searching for existing records at the point of cataloging. Has this been implemented? Has this been effective in reducing the number of duplicate records? Jean answered yes. There have been fewer reports of duplications, mostly due to Acquisitions not finding records due to variant editions being added after the placement of the order, such as a paperback. Jean noted that these are easily resolved, but that issues may increase with a decrease in personnel. Currently cataloging fixes these problems, but the suggestion was made that it would be better to be done in Acquisitions. Cataloging also cleans up the 948 fields created when Acquisitions imports the records.

- b. FSU's OCLC Reclamation Project and Associated Database Clean Up. – Matt noted that cataloging is facing several problems partly due to open positions, but that he was making another attempt at reclamation with an end of week deadline. Matt reported that there are about 42,000 records from ebrary with EBRs in the 001 field that haven't loaded into catalog. The Navigator product is becoming more developed than OCLC, and OCLC knowledge of FSU holdings is spotty. Matt has created a file of everything with FSU location codes with the exception of reserves, gov docs, brief records as defined by OCLC and bCode3s, and SOLs. He noted that there are about 20,000 SOLs and about 50 have location codes attached. These are mostly from Wilmington. Matt wants to coordinate regarding 049 on all MARC records to figure out if each has the same package. He mentioned putting 949 with all bib locations in the load table and if it has same number in 001 it should be marked to gather for deletion. OCLC may not include records in the reclamation if they are not already in the catalog. Matt suggests adding them as suppressed records, so can give to OCLC all in same format. They are all MARC records, but ebrary MARC records look different. Suppressed records can be done as contingency. Matt has not yet checked to see if ebrary books are in OCLC. He brought up what to do with the records when they get them back from OCLC. He said he could use a Perl script to alter the MARC records or auto IT script to load into Millennium. However, the latter is unnecessary and wouldn't be completely automated because the OCLC number gets put into different field than 001, which is used for other numbers– e.g. SOL numbers for Solinet records. It was suggested that he might be able to use program like MARC edit to do field switching so original ebr number preserved and OCLC number is put into the 001 field so that the catalog can de-duplicate, since de-duplication is based on the 001 field. It was noted that he might still want to include a marker so that the records can be grouped. Matt will send the MARC record file to UNCW and UNCP. He has also done some cleanup, by getting rid of a lot of brief records and will do more. Most items are not in the library anyway. On a side note, UNCP has finished retrospective conversion and added OCLC numbers.

- c. Scoped catalog and the rapidly declining funds for books – Arlene asked if the catalog default scope should be the consortium in this current economic situation where book purchases are impacted. Currently, UNCP and FSU scope to own records. There are pros and cons to both approaches. Rapid delivery with UPS is making the shared catalog much more usable, as with branches of a public library. There is not an easy answer and

the advisory committee needs to consult with the reference librarians, as user education involved. It was suggested to use the summer as a test. Shared collection development is a bigger topic, which should be dealt with separately. Due to the shared catalog project, collection development reports (current through 12/08) are available. Each institution has its own log in plus access to system reports and can look at age, subject, what's shared vs. unique, etc. Arlene suggested organizing a formal discussion, since the budget will not be getting any better – to be combined with unscoped catalog.

7. Loan Rule Changes
 - a. UNCW is no longer charging overdue fines for books and now graduate students have semester-long checkouts. UNCW's CMC not changed yet. – seems to work just fine
8. Open Help Desk Calls – Dan reported that 17 calls are currently outstanding. He said that there are some complete and a few to consolidate, noting that if he doesn't keep calling III about them they languish. However, once III deals with them, they can generally be resolved.
9. Next Meeting – early fall unless something comes up