

CLC Advisory Committee Meeting Minutes
Randall Library, UNC Wilmington
January 7, 2010

Attendees: UNCW: Madeleine Bombeld, Arlene Hanerfeld, Dan Pfohl (Chair); Laura Wiegand
UNCP: June Power; Rob Wolfe; Susan Whitt
FSU: Matthew Lawson, Jan Whitfield (Secretary)

1. Maintenance Split Update
 - a. Invoices paid
 - b. Inter-institution funds received

Dan opened the meeting with a thank you to the members from FSU and UNCP for their cooperation in consortium purchases and timely payments of their cost shares. All invoices for maintenance, new modules, and upgrade to the Server Replacement Agreement are paid.

2. New Millennium Modules
 - a. LDAP
 - b. Output Accounting Information

Dan will schedule a video conference between Matt Lawson, appropriate FSU IT people, Rob Wolf, appropriate UNCP IT people, Kevin Violette of UNCW, and himself to assess each campus's ability and willingness to participate in establishing LDAP as the method of authentication for Millennium WebPAC functions. Modification of the normal Millennium LDAP software will be required for users to be authenticated against the correct university's LDAP server.

The Output Accounting Information module from Innovative will reduce the amount of keyed input by passing accounting information input into Millennium Acquisitions to each campus's BANNER system. While the Output Accounting Information software is shared across the consortium, it will be up to each campus to reformat the output to match their Campus BANNER needs. More details will be known once the software is installed and sample output can be generated. UNCW would like to have this in place for the start of the new fiscal year in July. Circulation financial functions are not part of this module. The Bursar Out Module takes care of that. UNCP and FSU indicated they are not ready to work with Output Accounting at this time.

3. Syndetics functionality (ISBN/UPC number searches)
 - a. Response time issue resolved with new Millennium server.
 - b. Syndetics Plus added content in Bib displays.
 - c. Syndetics book jackets and links to content available in Millennium modules.
 - d. Added Fiction Profiles.
 - e. Syndetic's terms of use.

Syndetics appears to be working well, especially with the installation of the new consortium server. Thus, UNCW is re-instating their subscription to Syndetics and recommends FSU and UNCP also re-instate or renew their subscriptions. Syndetics have a fiction module, which UNCW currently subscribes to. The subscription expired at the end of the year, and each school is responsible for renewing the subscription if they want continued access. Right now, the subscription is running off of UNCW's authorizations, which will end soon. Dan will scope the display for each school. UNCP cancelled it, but will revisit subscribing. FSU would like to keep, but is not sure whether the subscription was renewed. Dan needs to know the status of cancelling or keeping by next week (January 11-15, 2010). The version currently displaying is Syndetics Plus, which includes reviews, dust jacket images, summaries, and TOCs. Dan just activated the Fiction Profiles element. Dan can have Syndetics scoped not to show in individual institutions, if necessary, and it will show in full consortium mode. The renewal price is from \$3,200.00 to \$2,200.00. Each institution will have to renew directly with Syndetics, not through UNCW. Dan will leave it on for now.

4. Indexing Requests

- a. Current list – Re-Index 20091111.docx.
- b. The cost for this will be covered under the Server Replacement Program agreement.
- c. Solicit other indexing needs from FSU & UNCP.
- d. LDAP needs patron record email address indexed. Waiting for ITSD to okay the project.

Several indexing requests were discussed about a year ago. Things were delayed because of budget freezes and cuts. The requests involved adding z in the 020 field index for the electronic format; 590, local notes field; 655 index term genre/form by keyword; and 490, the series statement field, ISSN for series. Dan will move forward with this using the Server Replacement Agreement indexing service in which one indexing project per year can be done at no additional cost. The turnaround is one month after contact and then schedule in two weeks. This one project can have multiple facets, so he asked if there were any other indexing needs.

5. ERM, CASE, WebBridge

- a. CASE Profiling
 - i. Include e-books? How do e-books fit into this model. Whether or not we include them in the CASE coverage load depends on several things (as I see it at this point) 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.
 - ii. Embargo function in WebPAC.
 - iii. Identifying and requesting new packages.
- b. Coverage Load
- c. Issues
 - i. Profile package peculiarities
 - ii. Record creation/matching – alt_lookup
- d. What FSU and UNCP can/are doing for implementation
- e. WebBridge Resources and configuring index databases.

UNCW has all holdings in but not has not yet done a catalog load. Coverage does show in the catalog. Dan worked on link resolving. There was a problem with the Science Direct system. It did not make soft links, e. *Acta AGR*. It does not show holdings, but will take you to the cover. Oxford journals will show correctly. UNCW has a call in to Innovative – they get data from OCLC. Arlene mentioned that JSTOR won't load if same ISSN number in more than one record, ex. *Computational Biology and Chemistry*. In 2007, FSU loaded a print record when there was already a print record, and Arlene had loaded an electronic record in 2003. If we have electronic records we need to move onto print, ex. *Obstetrics and Gynecology*. *Ethics and the Environment* shows UNCP's 2007 Project Muse record versus 2001 electronic record UNCW did. FSU added holdings. We had a bib record, but no check-in record. FSU needs to take the ISSN out. If there is a print record, use that, but if there is an electronic record, need to choose that record. Matt asked that the e-mails go to him, and I asked that they copy Vera also. OCLC records need to be updated in OCLC and resolve which records are the correct ones to use. Arlene said that she and Rob worked on CASE and were able to resolve JSTOR being loaded.

There is a volume and date problem; *Accident and Emergency Nursing* in Science Direct is v3(1995). CASE puts it at v.1n.1(1995). This information needs to be corrected. There are a lot of errors in Science Direct.

The embargo function has not been resolved. It is an open issue.

CASE is an open subscription. It is wedded to ERM. Dan is leery of Serials Solution, but it and another vendor could supply the data. EBSCONet will also tell you what packages journals are being added and dropped from. Rapid updates and global updates cannot do locations. Arlene could put all three of our locations in her template, ex. Science Direct, the freedom or college editions, Academic Search Premier, things that all three of us own. A question was raised about whether we could pay to get this done, and Dan said it could be pretty expensive, but we could look at alternative ways of doing it. Dan says there are enough packages in ERM, but he has not had much success with the link resolvers. Dan said he would be talking with his web people soon to assign links out from the catalog.

They have been adding and requesting new packages, like the Carolina Consortium. Arlene had to review the packages a day and a half to get the journals right and match the holdings. How many vendor packages do we have that provide us with MARC records? It was proposed that we use MARC records and then pick OCLC numbers. Catalogers should meet and talk about this as a plan. Some communication can be done through e-mails and some face-to-face.

Dan is working on categories in WebBridge , ex. author's search on Grafton, Sue.

6. Password Security Update
 - a. Plan for login password change.
 - b. Plan for Authorization password change.

Passwords have not been updated since 2007. A concentrated effort needs to be made to change passwords for security purposes. Dan will develop a schedule and a plan of action.

Release 2009 will be a Millennium way to update passwords. Dan can get the system to force us to change passwords. Regarding logins and initials, Dan could set it at ninety days or every May. Dan will set it for every ninety days and we will see how it goes, but he will wait until the 2009 release. Dan will forewarn us.

7. WebPAC Pro

- a. Texting call numbers. Bounced messages.
- b. Proposed "Cite this from OCLC." Do we want to move forward with this feature? Removed because of citation irregularities.
- c. Suggestion file – reroute to Drupal web forms for each institution, bypassing the Millennium form? UNCW - <http://randall3.uncw.edu/extras/suggestions>.

Texting call numbers appears to be working well. Only a few numbers bounced back, so it is not 100% reliable. AT&T and Cingular may have internal problems. There are more problems with these two than Verizon.

OCLC now has current formats for citations. FSU needs to turn it on and try it. Everyone else has their new citation manuals, but we are still waiting to receive ours. There was a discussion on whether UNCP and FSU students should have it turned on in our scopes. Media citations are not correct, but then we can always emphasize that they check the citations to make sure they are correct whenever they use them. FSU and UNCP asked for this function to be added to their scoped WebPACs.

Drupal forms are available. Everyone needs to look at them and provide feedback to Dan.

8. Cataloging Issues

- a. FSU's OCLC Reclamation Project and Associated Database Clean Up.
- b. FSU and UNCP ebrary cleanup.
- c. Gary's MAT TYPE suggestions – see below.
- d. Scoped catalog – what are the advantages/disadvantages?
- e. Ebrary clean up.

Matt said that FSU is still working on cleaning up the records that have the Solinet numbers. Dan voiced objections to OCLC data, because there would still be duplicates with the OCLC numbers in the records. There are about 30,000 records left to export. Matt said he has records with Solinet numbers in a file.

Regarding ebrary cleanup, Rob says he never received the documentation. Dan will resend it. Matt said he and Dan edited a script. Matt wrote a PERL script, but there were a few that had the same ISBN numbers. There were 120 to 150 titles that needed to be updated by hand.

Gary wants MAT TYPE to have different types for CDs, DVDs, streaming videos and VHS. (See attachments below.) This would require a change in the fixed field by hand. Do we want to break now from the National Standard; I spoken, j music? UNCW did and now regrets it. Do we continue to breakout new formats? Western Carolina had a good breakdown. Look at their

OCLC type field, under the Advanced Search. Catalogers might have to meet and public services also to get feedback concerning MAT TYPE.

Dan says we could do this, but when a record comes from OCLC, there is an OCLC record requirement. He would prefer we not use LC records for non-print records. Vendors like ebrary did not initially provide OCLC numbers in the correct field. The one record approach was initially done because vendors provided records with no OCLC number. Records have been loaded for the following aggregators; PBS, ebrary 42,000-36,000, 350-335 MyiLibrary through NCLive. We have no guidelines. Do we need OCLC numbers? Some generated records will be brief. OCLC sells the collection sets. We need to have more of a standard, if we don't, it will become a mess. Guidelines need to be written down and added to the Consortium cataloging guidelines.

9. Staff training/communication.
 - a. Circulation.
 - b. Acquisitions.

FSU Circulation has requested training. Suzanne and Gary at UNCW may not be able to meet until late February. Everyone needs to review administrative policies and reports and database maintenance guidelines.

10. Millennium Integrated Rel. 2009B beta test.

On Martin Luther King, Jr. Day, January 18, 2010 from 9:00 a.m. to 3:00 p.m. the UNCW server will be down. UNCP opens at 2:00 p.m. that day and FSU is closed.

11. Open Help Desk Calls – See CSDirect.
12. Next Meeting

Will be held at FSU.

Respectfully submitted,
Jan S. Whitfield

Notes from the Agenda When it was sent in January

Indexing Requests – Get list from Susannah & Gary. The cost for this will be covered under the Server Replacement Program agreement. Solicit other indexing needs from FSU & UNCP.

Database Maintenance Guidelines: <http://library.uncw.edu/UNCCLC/dbmaint.html>

MATTYPES and Icons -- I broached the idea of adding mat types and icons in the Emerging Technologies Committee meeting to get some feedback. Most people seemed to like the idea of separating the video mat types. I showed an example in Western Carolina's opac, where they have separate materials types and icons for DVD, VHS, and Streaming Video. The one drawback is the lack of a single material type to search all video content, but it's unclear how many people use that now and most people I encounter want only DVD anyway.

Would it be possible to create a "video" location to search by, and get all formats returned in the results? Currently, one can only search UNCW AV, which also search CDs and AV oversize. Is there any way to limit to item location(s), rather than bib, or create a separate bib location for videos? I know those would be major changes, so it's just some ideas to consider.

Also, in the conversation, the idea of separating spoken and music recordings come up. I think everyone also would like a separate material type for music CDs and audio books. This came up recently among the consortium members. Perhaps it can be revisited. Currently, we use "j" for both, but OCLC uses "i" for non music and "j" for music. Do you think these changes could be discussed at the next UNCCLC meeting?

Gary

OCLC Record Requirement - Recently, we've gotten some large batches of Marc records for subscribed and purchased electronic resources like ebooks, streaming videos, and online music. For example, the recent Gale e-books we got as part of Opposing Viewpoints package, the MyiLibrary records from NC Live, and the Classical Music Library records from Alexander St. Press all have Marc record sets that are available to us free of charge. But the records provided do not contain OCLC numbers, even though some of them may be in Worldcat.

If we chose not to use the provided records, it would mean individually downloading or creating the hundreds or thousands of Marc records in some of these batches. Then we'd need to edit them and update holdings – all for the sake of getting an OCLC number. Also, since they're electronic resources that we can't lend through ILL, we're not getting that benefit from having our holdings updated in Worldcat, and if we cancel a subscription to one of the packages, we'd then have all those holdings in Worldcat to remove.

We could ask that vendors provide us records with OCLC numbers, but I wouldn't be surprised if we continue to see more vendor-provided records without OCLC numbers in them because OCLC has been trying to change its usage policy to keep vendors from redistributing records once they've been contributed to Worldcat. (OCLC insists that they become their property once they're in Worldcat).

Just something for us to consider as we go increasingly digital in our purchases and subscriptions.
Gary

Some discussion thoughts - This may take some thought, discussion, and adjusted guidelines. But requiring an OCLC record/number whenever possible serves to 1) reduce duplicate records in our local database, 2) provide an overlay point (related to #1), 3) ensure quality records, and 4) provide holdings information to the larger library community.

I don't know what current methods are available for matching batches of records against the OCLC database. Nor do I know how much that would cost. I do know that FSU, as part of their OCLC Reclamation project, coordinated approximately 36,000 ebrary records. OCLC returned corresponding OCLC numbers that we moved into the MARC 001 field before loading the MARC records into our local database. We also manipulated several other data points.

We need to consider carefully how adding non-OCLC records (no OCLC number in the MARC 001 field) will affect our database. Might there be conflicting MARC 001 values? How might a variety of number schemes in the 001 field affect future database migrations?

Do we still care about keeping duplicate records in the database to a minimum?

You make a good point that electronic format material doesn't need to be listed in OCLC because it won't be loaned. Yet it would be useful to have our holdings for these items in OCLC because of shared catalogs such as WorldCat Local (UNC Library Express). While non-UNCW users would not be able to access eholdings, UNCW patrons using that tool would be able to. And there are collection development tools (from OCLC and others) that can make use of OCLC holdings.

I'm not saying we should not review our policy. I am saying that we need to be careful to maintain the integrity and usefulness of our database. I will add this to an already busy agenda for the UNC-CLC Advisory Committee meeting on Friday. I'm sure that discussion will not be the final word but, rather, a good beginning discussion.

--Dan