

Voyager Music Users Group (VMUG)

Concerns & Questions for Endeavor (2004)

Assembled January 2004 by Tracey Rudnick and Jeannette Thompson. Last updated 1/28/04.

Incorporates former VMUG enhancement requests by Jennifer Bowen and input from VMUG participants. Special thanks to Jennifer Bowen, Karen Little, Rebecca Littman, and Kerri Scannell.

Below are concerns and questions from VMUG members. New questions will emerge at the February meeting. It is requested that Endeavor provide brief guidance on any items below that are local configuration issues, and updates on any remaining items. VMUG will then prioritize, refine, and select a few items to put forth as formal enhancement requests. Note: the authors are on version 2001.2.1, but other libraries may have different versions.

General

1.1. Make “and” the default in Circ and Cat Keyword Builder

Logged as problem #77318

In Cataloging and Circulation, in the Keyword Builder, the default is “or” (literally “any of these”), rather than “and” (literally “all of these”), as it is in OPAC. The lack of standardization is problematic. (Users fare better with the current default “and” in WebVoyage; we do not wish to see this change.) Ideally, each institution (or better, each user), should be able to indicate the preferred default.

Acquisitions

2.1. Received/Mark Button

Bug: when trying to receive items on a P.O. in the Acquisitions module, the “Recv/Mark” button does not function properly anymore. In the past, you could select several items on a P.O. and receive them all by clicking the “Recv/Mark” button. Now when you click that button, the Receive/Mark window will open, but the “Receive” and “Mark” buttons are grayed out. Now in order to receive something, you must select the line item(s) and then click the “Details” button. When that window opens, you must select the “Receive/Mark” tab and receive the item there.

2.2. Transferring P.O./Acquisition information between records

Logged as problem #76176

We cannot transfer P.O./Acquisition information from one bibliographic record to another. After a P.O. has been created, it cannot be relinked to a different bibliographic record. Thus, if we order an item and get a different but acceptable edition, we cannot relink the P.O. to the new bib record that we’ve downloaded for the edition received.

Cataloging

3.1. Global heading change: excludes subdivisions

This has been on previous enhancement lists but is still not fixed. When a heading changes, the global heading change only works for the main heading. Any records with added subdivisions (e.g., free-floating) do not get changed. In order to change those, one has to actually input records for them. This problem is spelled out in detail in the Enhancement requests (cataloging) on SupportWeb. Considering that authority control is especially important for music cataloging, it would be good to see this addressed. (Example: the authorized heading for “African American musicians” changed from “Afro-American musicians.” Overlaying the authority record with this change will put the record into the global heading queue. After acting on the queue, any bib records with exactly that heading will be changed, but any bib records with “Afro-American musicians” and any geographic or other subdivision that doesn’t have its own authority record will not be changed. [Editor’s note: someone mentioned that “it would be great if the system could change headings from 4xx to the correct 1xx”, but this needs clarification.]

3.2. Global heading change: Name-Title headings do not get changed

From 2001 Enhancement Request. The process involved in Global Heading change will correct all headings in the Name Headings index, the Subject Headings index, and the Title Headings index. However, headings in the Name-Title Headings index (1XX/240’s, 700a/700t, etc) are not changed. The report resulting from the final step of this process lets one know that they are not changed and need to be changed manually. (The changes do appear on the queue, but won’t go through.) There is an additional problem: when attempting to do a global change on a name heading in a 1XX if the record has a 240, the name heading won’t get flipped if there is a 240, even when you are not even trying to change the 240. [Comment added 1/27/04: Name-title headings in 700 do get changed, but only if there is a 1-to-1 correspondence](#)

with the authority record. In other words, if there is any addition to the end of the title, like arr. or a part title, the headings will not be changed. They would be changed if there was an authority record for exactly the same permutation of the title. But 100/240 combinations do not change even if they are exactly the same as the authority record. If a name heading is changed, it will only be flipped in cases where there is no title attached, as in a 100 with no 240, or a 700. In other words, it is almost useless for composer's names (Blair, 1/27/04).

Notes from previous requests: also known as "Incident 38169." From Keeley H. Sorokti, Customer Support Manager, Endeavor, 2/16/01: I have transferred this incident to Meredith Curtis, Senior Support Analyst. We are working with Product Management and Development and will have a status update soon regarding this problem. Burke responded 2001, indicating "a small controversy." This worked in Release 98, but not in 99 or 2000.

3.3. Selecting diacritics

Logged as problem #74142

When doing original cataloging (or modifying existing records), selecting the correct diacritic can be cumbersome ("Diacritic Entry" in the "Edit" menu). Simply adding a grid would make it easier to use. Version 2001.2.1 does have a small box, but one has to click on some of the characters to figure out the placement and hence, what diacritic it really is. Ideal: a setup similar to OCLC where one can choose characters by language or character name. Note: this is not a major problem for most people as not many use Voyager for original cataloging, but it is important when correcting information and adding fields, such as 505 (contents) fields.

3.4. "Pick and Scan"

Logged as problems #70802 and #67458

One good thing: the implementation of "Pick And Scan" allows item records to be modified one-by-one or as part of a list. It's a nice tool, but with more flexibility, it would be even better. Since Pick And Scan's work is based on the presence of a specific item record, the ability to change holdings records that do not have item records or to make batch changes to multiple holdings/item records with a common feature (e.g., an item type which needs changing to a different item type) requires your own programs or third-party software to be efficient. An additional Voyager program is needed to allow libraries to readily make these types of changes.

3.5. Scrolling

Scrolling down, especially in a long contents note, is sometimes impossible. (VMUG knows about the Cataloger's Toolkit work-around. This problem may be addressed since the next enhancement deals with Cataloging navigation.)

Circulation

4.1. Retention of last borrower information

Most institutions will not implement the patron history feature because of concerns for user privacy (storage is another concern). As a compromise, retaining information about the last borrower would be helpful for finding missing parts, discs, or inserts that are noticed only when the next patron tries to charge or use an item. Ideally, the "last borrower" information would be retained through the next charge, then deleted when the new borrower returns the item (that person would become the new "last borrower"). If this is not acceptable, the last borrower could be cleared upon the next charge (which is still premature, since users often only discover a problem when they try to use the item). A third option might be clearing the last borrower after a specified time (e.g., two years). This feature should be available in the circulation module for immediate problem solving, rather than through less accessible reports.

4.2. Full-screen windows

Logged as problem #72685

We used to be able to fully open the Circulation window. Now it is difficult to tile several open windows. Working with fines records is frustrating and time consuming since one cannot see all of the information for even a single item; this window needs to be expandable.

4.3. Recalls on overdue items

When a recall occurs after an overdue notice has been sent, the recall notice is *not* sent. The current borrower has no way of knowing that the book cannot be renewed and that returning it late(r) will incur a significantly higher fine. (This is significant at institutions with low regular fines or extensive grace periods.) The current borrower also needs to know that another patron awaits the item. *It is not clear whether this is a local issue or wider spread problem. Verification is underway.*

4.4. Unsuppressed “withdrawn” items should display the status in the OPAC Logged as problem #65256

Unsuppressed items with the status “withdrawn” do not have this status appear in the OPAC. As far as users are concerned, the item is on the shelf. This is misleading to users. There seems to be no line in opac.ini where library staff can indicate the desired wording. (Whether to suppress or display withdrawn items should be a local decision.)

WebVoyage (Online Public Access Catalog [OPAC])

5.1. Make the Simple Limits drop-down menu available on the Builder search page

Users are confused and frustrated when they cannot limit their searches using the same (fast) method as that found on the Simple Search page.

5.2. Limits for heading searches

Formerly logged as problem #6890

From 2001 Enhancement request. First discussed during meetings of the OPAC Development Task Force in 1996. At that time, and in 1999, Endeavor developers explained that implementing pre-search limits on heading searches would be very difficult because the initial search is not on the actual bibliographic records, but that post-search limiting would be somewhat easier to implement. Post-search limits became available in Release 2000, albeit with many bugs. By 2001 bugs were ostensibly fixed and VMUG was prepared to remove this item from the list.

As of 2003, users appreciate the ability to limit their keyword searches by format but continue to ask why they cannot limit their heading searches (especially subject and name/title) in the same way (ideally using the Simple Limits drop-down menu). Post-search limits for heading searches are cumbersome for users and often malfunction (e.g., result in blank heading or title screens).

5.3. Redesign of Limit by Type/Medium into a single limit

Formerly logged as problem #12863

VMUG’s original enhancement request called for the integration of “formats” (leader 006) and “medium” (leader 007); this separation was seen as unintelligible to users. Ideally the list could be expanded to include the 006 from the bibliographic record and the 007 from the MFHD. In release 2000 it became possible to create a new limit menu from any combination of data, including 006 and 007 by using the Simple Limit (the drop-down limit menu in the Simple Search page).

VMUG participants still need to answer some questions: (1) Does this solution work for most music users (i.e., do their institutions actually put the appropriate limits in their Simple Limits menus)? (2) Would users still benefit from combined format/medium limits in the regular Limits page? (The authors believe the answer to be “yes.”) (3) Should all limits be available as drop-down menus on the main search pages (similar to WorldCat’s Advanced search)?

5.4. Create an intuitive (alphabetical) jump-bar for the Name/Title Headings search

When Endeavor offered a Windows OPAC interface, users found the Name/Title Headings search (if they had an opportunity to use it) to be very easy to use and most effective for music searching. All headings appeared in one list; a vertical scroll bar allowed quick navigation among an author’s titles from A to Z.

The Name/Title Heading search is now available in WebVoyage (Simple Search menu), but users have a great deal of trouble navigating the results. They must click the “next” button to view the next 10/20/50/100/etc. entries. To move alphabetically from Beethoven...Bagatelles to Beethoven...Symphonies one must click on “next” some fifty times. Librarians can teach a shortcut that jumps the user to the desired title: type or paste the entire name/title string as a shortcut. (Example: Beethoven, Ludwig van, 1770-1827. Sym). Most users never discover this shortcut on their own, and most find it cumbersome and difficult to remember. They need a jump bar. Unfortunately, the jump bar that is available in other searches is imprecise and often does not lead frustrated users to their desired titles.

Possible solutions: (1) an alphabetical jump bar that takes users to titles (in the Name/Title Headings list) starting with a certain letter; (2) a box in the headings display where users can type the first letter(s) of the desired title; (3) a search that allows the user to enter both the author AND title (this is NOT the same as author and title Builder keyword searches; see 5.12.c below for ideas of music keyword searching); or (4) a headings list that displays in a simple text-only format in a single scrollable screen, similar to that offered in the original Windows interface (clicking on a heading would then lead to entries in a regular title/holdings display).

5.5. Redirected Name/Title Heading searches (from 700a/700t)

Related to problem #78864, but not the same

Offer the **Name/Title Heading search** as an option for redirected searches to be applied to the 240 (accompanying 100 field implied) and 700|a|t. A VMUG participant sent an example.

Users can click on a subject heading in one record and be linked to all other items with that same subject heading, but WebVoyage does not have the capability of linking 100/240 or 700a/700t name/title headings in an OPAC full display with other 100/240 and 700a/700t name/titles. For instance, the University of Kentucky did manage to get the 240 field to work. As an example, do an Author search at <http://infokat.uky.edu/> on Mahler and pull up everything in the catalog with him as author. Open a record for his *Kindertotenlieder*, click on the 240 (first uniform title) and the OPAC will pull up a new search results screen that is all the records for Mahler's *Kindertotenlieder*. This pulls in all the 240s and 700 name titles with that uniform title. It is very encouraging! Unfortunately, if you try clicking on a more generic uniform title in another record, such as "rhapsodies," you get too many other composers (Brahms, Liszt, Bartók, etc.) and thus many irrelevant hits. The redirected search needs to search the 100 and 240 at the same time, and it should be the Name/Title Headings search.

Back in the *Kindertotenlieder* search, if you click on a link that is from a 700 field, you end up back at the author entry and *all* records associated with that author/composer. Since the vast majority of our name/uniform titles end up in 700 fields, we would want users to be able to click on these and find similar name/title headings.

Institutions should be able to indicate whether the redirected search will be on the |t or on all the title subfields. For example: a redirected Name/Title Heading search on 700 12 |a Mahler, Gustav, |d 1860-1911. |t Lieder nach Rückert. |p Um Mitternacht. |o arr. could focus on just the |t and go to the beginning of all headings containing the set's title (Lieder nach Rückert), or could very precisely search subfields and go to headings that match exactly (e.g., the arrangement of one of the songs). Both approaches are valid and should be a local decision.

5.6. Adding fields/subfields to TALL index (title left-anchored); want to add 700 |t subfields, etc.

Formerly logged as problems #14307 and #11686

From 2001 enhancement request. We need the ability to add the following fields/subfields to TALL (Title left-anchored index):

700 fgklmnoprt
710 dfgklmnoprst
711 fgklnpst

(Note: suggested additions are the same as those title subfields now indexed in Name/Title Heading index; the logged problems mention only addition of X00t, however.) Note to VMUG: this enhancement request originally suggested other fields to add or delete, but these are not essential to music. Also, a request for instructions on editing the SEARCHPARM table has been deleted; Endeavor may be willing to edit these for a fee.

5.7. OCLC number and Voyager number searching in WebVoyage

There seems to be no way to search by Voyager Number in WebVoyage. (This is useful, for example, when student assistants help with materials processing.) Searching by OCLC number is also a problem because of the varying prefixes in the 035 OCLC number: keyword searches often do not work because there is no space between the prefix and number. ILL processing and collection development often rely on both the Voyager and OCLC number searches. Users occasionally search OCLC numbers gleaned from bibliographies and WorldCat.

Examples: at UConn or UWisconsin Milwaukee: 21976199 (*Feminine Endings*) works but 43645887 (a CD of Ronald Caltabiano) does not, unless you use ocm43645887.

We *can* search by OCLC number (035|a) in the Circ/Cat modules: it's called "System Number (035a|z)." Is this an index that can be locally added to WebVoyage Builder, or integrated into the regular keyword index?

5.8. Blank title and heading display screens

After a search has been executed, occasionally the list of results (Titles or Headings Lists) will be empty. The number of results display at the top of the screen, however, there are no titles listed. This often happens after viewing an individual record or after applying "Post Limits." To resolve this problem, users must start a new session by clicking on the "exit" button or restarting the browse; all results (including history) are lost.

5.9. Call number search does not for many A/V ("other") call numbers

Linked Incident Number(s): 1243

At best, the results show the number that appears *after* the requested call number. This is inconvenient for the user, who must click the "previous" button. At worst, if one types the complete call number, the entire call number range

is skipped, rendering the call number search useless. Users *can* type just the first letters of the call number, then scroll through the resulting list. This is inconvenient, and most users never discover the trick; those who are taught do not remember it. Example: to find “MCD B83 Md2” (Bruckner Mass no. 2) at <http://homerweb.lib.uconn.edu>, one must search “mcd b” and browse dozens of pages to get to the end of the MCD B’s. Typing the entire call number—as most users logically do—fails.

The problem disproportionately affects audiovisual materials, since they often are filed under “other” call number systems. Call number searches are extremely useful to music searchers: those who enjoy classified collections can browse by composer or type of music; users who have accession-ordered collections can identify the most recently acquired recordings. The loss of this search is most unfortunate.

If this is a local issue that each institution can resolve, it would be helpful if Endeavor would provide instructions. Note: the search works perfectly in our circ/cat modules.

Editor’s note: SupportWeb indicates that setting the search to “Find” in opac.ini, rather than “Browse” offers greater precision (but less recall) and successfully searches “other” call numbers. At institutions unwilling to do this, two different call number searches might be possible. (Example: “Call number—LC numbers” and “Call number—A/V & Archives”). The political implications may still make this solution unworkable.

5.10. OPAC “as a phrase” searches (or future proximity searches) should cross subfields.

Users know that quotation marks force the OPAC to search adjacent terms. They do NOT know that “as a phrase” searches fail to cross subfields (most do not even know about subfields). Thus, a user searching for McClary’s *Feminine Endings: Music, Gender, and Sexuality* might logically type “feminine endings music” using “as a phrase” in the Advanced Search or in a relevance or Boolean keyword search. The search will fail, yet the library may own the book.

Likewise, users cannot perform precise keyword searches for exact uniform title phrases or any part thereof (e.g., Mozart and “quintets clarinet”; the full uniform title (with subfields) might be |t Quintets, |m clarinet, violins, viola, violoncello, |n K. 581, |r A major. |p Larghetto; |o arr.). Here is another “as a phrase” keyword search that would fail: |a Arlésienne. |p Menuet. Ideally, “as a phrase” searches should search bound fields, such as the name/title entries (100/240 or 700a/700t). This would facilitate more accurate retrieval of name/title entries.

5.11. Proximity searching to support more accurate retrieval of bound names/titles

Proximity searching would facilitate more accurate retrieval when searching contents notes (505) and bound fields such as name/title entries (100/240 or 700a/700t). Any proximity searching MUST cross subfields. This request is related to the “as a phrase” request in concept, but would be more powerful and desirable for users since they would not need to know the precise word order.

5.12. Logical search results for keyword searches (Command/Boolean or Builder)

Currently, title lists for keyword searches display the 100 (author) field and 245 (transcribed title). Users cannot see the keywords for the actual works they searched (e.g., 700|a|t or 505). With very precise searches such as distinctive musical titles, this does not matter. For more difficult searches with hundreds of hits (e.g., generic form names), the keyword searches are almost useless, particularly since we cannot use phrase or proximity searches (see above). Relevance ranking does not help. (This is why we strongly emphasize the Name/Title Heading browse searches above.) Items 5.12.a–c below outline some possible approaches to the keyword problem.

5.12a. Sort and display by uniform title in keyword searches.

Formerly logged as problem #14302

From 2001 enhancement request. When setting up indexing configuration for keyword indexes, it would be nice to have the ability to choose, as an option in System Administration, both sort and display by uniform title using the following field hierarchy: 130 (if present), 240 (if present), 245 (if no 130 or 240). Currently there is no way to display items sorted by the 240 as a secondary sort (after author) in keyword search results, and therefore there is no way to have an intelligible search result. In displays, the administrator can choose “uniform title” as a sort option, but this displays a blank column if there is no 130, 240, or 243 in a record. In any case, this is more suitable for a separate “Music keyword search” (Cornell approach; see Guide Keyword, Author/Creator: Uniform Title) rather than configuring most search results this way.

This solution is still of limited use. If a keyword search retrieves an item because of the 700|a|t, the user will still not see this name/title in the keyword results list, even with a uniform title sort. (This will be a difficult problem to solve as long as we display title lists, rather than heading lists; see 5.12c for one potential solution.)

5.12b. Integration of titles in search display screen

Voyager does not allow for an integration of all titles in the search display screen of the OPAC. For example, a typical OPAC has three columns: Author, Full Title, and Date. The Full Title is from the 245. When looking at the search results screen (title list) we do not see any uniform titles. Having one title column that shows both 245, with uniform titles (and their accompanying names, if different from the 100 field) integrated alphabetically would be one possibility. One could also have a fourth column that shows the 100/240s and 700|a|t's for each record; this might be crowded but it also might be easier to implement and more meaningful to users. (The same effect could be achieved by listing the name/titles just below each 245 in the title list.) Browsing results would be easier for the users since they would be able to tell what the title actually means (for example, a title "English Airs" is pretty non-descript).

This solution is also of limited use. If this suggestion is too "content-laden" for a results list, perhaps the results could simply display any name/title combination that contains at least one of the keywords. A "Keyword In Context (KWIC)" feature would do the same thing. This would make the longer lists more manageable yet more meaningful than the current results. (For a much more precise search and display, however, see the next suggestion.)

5.12c. Create a keyword search limited to bound phrases (e.g., Name/Title Heading index).

Typing author and title keywords—even when limited to the author and title fields—retrieves a high number of false hits. For example, searching for author keyword "beethoven" and title (or uniform title) keyword "symphonies" (in hopes of finding Beethoven symphonies) retrieves discs containing Beethoven overtures and Brahms symphonies. Users could get more precise results if search terms could be limited to those found in the same bound phrases, such as those found in the Name/Title Heading index (100/240 or 700a/700t). Using the Name/Title index in a keyword search would have the additional benefit of searching cross references from authority records (since these are in the Name/Title index); the user's keywords would thus lead to more correct headings than the current keyword searches. The results should show a list of retrieved headings (alphabetically by author, then uniform title—240, 700t, etc.). The results list would include any cross references "hit" upon. Ideally, results could be limited by format (see 5.2). Users would then click on the relevant headings and see title lists, much as they do with current headings searches.

This solution could not replace the current keyword searches, but would allow institutions to offer a more precise music keyword search that has a meaningful results display. Institutions might consider combining this search with a 505 keyword search to pick up extra authors and titles in the contents notes. Add proximity searching, and we would be several steps closer to a powerful music search.

VMUG needs to further discuss the merits of 5.12a, b and c. Endeavor programmers might have additional programming suggestions to help users *effectively* and *quickly* find the music they need.

5.13. Author search: 700|t vs. 245 in title list

When doing a plain author search in Simple Search mode, any items pulled up because of the 700 name/title records display with the 245 title rather than the 700|t title. It is very misleading for users: they can see the author they searched (700|a) but cannot see the matching title (700|t), or see a completely different title. (Example: the user searches the author "Beethoven" and sees Author: Beethoven and Title: 1939 Victor Recordings. Only one of the seven works on this recording is by Beethoven. Ideally, the list should either include both the 245 AND the title connected to the author, or it should only display the latter. (While the Name/Title Headings search addresses this problem, most users gravitate to the Author search and flounder unless noticed or taught by librarian.) [Example added 1/27/04: an author search on Frederick II King of Prussia shows him to be author of *A Musical Offering*. The user retrieves the score or CD and is surprised to discover that Bach is composer.](#)

5.14. A thought about FRBR

"FRBR (Functional Requirements for Bibliographic Records) is 1998 recommendation of the International Federation of Library Associations and Institutions (IFLA) to restructure catalog databases to reflect the conceptual structure of information resources" (from *OCLC Research Activities and IFLA's Functional Requirements for Bibliographic Records*, <http://www.oclc.org/research/projects/frbr/default.htm>, accessed 26 January 2004).

A major issue for FRBR implementation is that librarians won't be spending much time or money on FRBR-izing individual records, unless the systems make it possible to have displays that maximize the FRBR relationships (the work would otherwise be worthless). This relates to problems addressed in 5.4, 5.5, 5.12, and 5.13 (and maybe others). If the system understood and utilized the concept of a work and all its derivatives, it seems as if the indexing would flow naturally. OCLC has created a model which it's giving away free. What is the future of Voyager and FRBR? How will two different kinds of records interact seamlessly for the user? What is this user group's role in shaping implementation?