



Single Bib Pilot Project

Florida Library Association Conference

April 8, 2010

Jean Phillips (jeanp@ufl.edu)

Florida Center for Library Automation

www.fcla.edu





Background

- SULs have completely separate/independent bibliographic files
- The only “shared” aspects are the LC and NLM authority files, the FCLA support staff, and the technical infrastructure
- Single Bib is a complete re-do of Aleph architecture, not just bibs



Two Studies and a Summit

- 2008: TSPC assigned a small group to explore the possibility of sharing bibliographic records
- Fall 2008: CSUL appointed a Task Force to review the report and investigate further
- September 2009: CSUL announced the participants in the SBPP
- October 2009: Discussion at Catalog's Summit helped inform the work of the SBPP



Areas of concern

- Will local enhancements be lost?
- What about:
 - Special Collections?
 - Music?
 - Serials?
 - Non-standard treatment of OCLC records: Ex. UWF Curriculum records?
 - Multi-format records?
 - Proprietary records/enhancements?
- How will Acquisitions workflow be affected?



Single Bib Pilot Project

- Small group meeting weekly: Amy Weiss (FSU); Betsy Simpson (UF); Susan Heron (USF); and FCLA staff: Ellen Bishop, Daniel Cromwell, Mary Ann O'Daniel, Donna Alsbury, and more
- If you want to watch the work develop: <http://wiki.fcla.edu:8000/SBPP> (need logon)
- Updates on monthly TSPC calls



Phased work

- Phase 1: Merging of bib. records and holdings
- Report to CSUL, move to next step?
- Phase 2: All other records, full functionality
- Report to CSUL, move to next step?
- Transition to Production



What we've worked on

- Draft merge specifications including treatment for individual MARC tags
- Big sets: over 30 listed, is there a way to match on more than OCLC number
- Data analysis: many, many reports
- Many, many other things



Draft Merge Specifications

- Match records based on CIS #, then OCLC number, then Serials Solutions #, otherwise no match
- Include all but physically deleted records
- Compare the base record with the incoming record and handle each tag as specified in the tag treatment doc



Tag treatment

Options:

1. If not found add it, only one tag from latest record kept, no dupes, for non-repeatable fields.
2. All unique tag content is kept, all have \$5 added.
3. Same as #2, no \$5s added.
4. None kept, drop all occurrences.
5. Use longest field.
6. Use most complete field (008).



Data Analysis Reports

- Bibs with no OCLC number
- Tag values – all MARC and nonMARC tags used in Aleph
- Orphaned records – active items & orders linked to physically deleted bibs
- Overlap analysis: Special Collections
- MARC organization code usage
- Suppressed BIBs with unsuppressed HOLs



What FCLA has worked on

- Creating/configuring SBU
- Aleph OPAC
- Client setup
- Permissions
- Merge program:
 - Started with Mango merge
 - Improved matching (improved Mango merge also)
 - Adjusting for different tag treatment
 - Added relinking of HOLDings and ADM info.



Phase 1.1

- First attempt at draft merge specifications
- Did the program correctly handle the matching, merging and tag treatment?
- Are HOLDings attached to the right records?
- What about the setup could be adjusted/improved?
- How should we change the specifications?
- Agile: fix and reload, repeat if necessary



Still to come

- Revised timeline
- Merge local authority files
- Phase II (set up and test all Aleph functionality)
- Transition plan
- How loading will be done in SBU
- How authorities will be done in SBU
- Redo of and Arrow reports Data warehouse
- Much more....