Report on Data Review and Communication During Florida Academic Libraries' Catalog Migration

Christine Dunleavy
University of South Florida St. Petersburg, cdunleavy@mail.usf.edu

Follow this and additional works at: <https://docs.lib.purdue.edu/charleston>

Part of the [Cataloging and Metadata Commons](#)

An indexed, print copy of the Proceedings is also available for purchase at:

<http://www.thepress.purdue.edu/series/charleston>.

You may also be interested in the new series, Charleston Insights in Library, Archival, and Information Sciences. Find out more at: <http://www.thepress.purdue.edu/series/charleston-insights-library-archival-and-information-sciences>.

Christine Dunleavy, "Report on Data Review and Communication During Florida Academic Libraries' Catalog Migration" (2017). *Proceedings of the Charleston Library Conference*.
<http://dx.doi.org/10.5703/1288284316686>

Report on Data Review and Communication During Florida Academic Libraries' Catalog Migration

Christine Dunleavy, University of South Florida St. Petersburg

Abstract

A statewide communication plan is the essential foundation to successfully analyze Florida's college, university, and joint use libraries' catalog data integration as the data migrates to a new integrated library system platform. Librarians, library professionals, staff, and authorized community members are preparing the new library catalog and discovery interface, scheduled to go live in July 2018, and are currently testing Florida's academic libraries' data in Sierra/Encore Duet's online catalog. December 2017 marks the 20th month of review, and Florida's collective library expertise and input is advancing the quality of the transfer of data and discovery configuration. Two library staff in the department of Collection Development and Technical Services at the University of South Florida St. Petersburg have working group assignments in Acquisitions/Serials and Cataloging/Authorities validating functionality of task completion and providing recommendations for improvements. Each data extract increases the usable data, alongside the interaction and recommendations of statewide library staff who report their findings. Ultimately, the new catalog will support 40 libraries, sharing a single bibliographic record environment of approximately 13 million bibliographic records.

Introduction

Florida Academic Library Services Cooperative (FALSC) has contracted Innovative Interfaces to provide Florida public college, university, and joint use libraries' next-generation catalog and discovery system. Florida's academic libraries' current catalog is supported by ExLibris' Primo/Aleph. Innovative will provide researchers with access to materials in the library catalog, full-text journal articles, and other types of resources through Encore Duet and EBSCO's Discovery Service (EDS). In a concurrent project, Backstage Library Works performed the initial de-duplication of bibliographic records to integrate the formerly separate college and university libraries' databases. In coordination with institutional remediation projects, like de-duplication of locally protected MARC fields in merged records (Dong, Glerum, & Fenichel, 2017), Backstage Library Works will continue in their role as additional remediation work is identified.

Communication Structure

Coordinating statewide data review through working groups was established by FALSC in the areas of Acquisitions/Serials, Cataloging/Authorities, Circulation/Resource Sharing, Discovery Interface, E-Resources Management, Joint Use, Systems, and Training. Working groups used software and Web-hosted platforms like Blackboard Collaborate

(online meeting software), Sierra/Encore Duet/Aleph/Primo-Mango, Canvas (learning management software), Google Drive, and Wikis, which supported opportunities for feedback and engagement among Florida's academic expert communities. Updated data from extracts and partial and major reloads appeared at irregular intervals, and FALSC staff widely announced major news and updates on the status of data on their implementation Wiki and through working and discussion group listservs, among other avenues.

Communication and training occur across multiple platforms including face-to-face and asynchronous sessions on collaboration-facilitating software like WebEx and Blackboard Collaborate. The University of South Florida (USF) also used the learning management software Canvas, blending online, face-to-face, and asynchronous committee communication to coordinate with other libraries in the system including Nelson Poynter Memorial Library at St. Petersburg on training, news, discussions, and developments.

FALSC and Innovative provided Sierra training, and FALSC recorded and publicly posted the recordings on FALSC's Wiki in the fall of 2016. The spring of 2017 was dedicated to regional training at the institutions, during which time library staff had hands-on interaction with Sierra in full-day, face-to-face sessions. Those training sessions examined the full

software capabilities of reports, electronic resources management, cataloging, acquisitions and serials, and circulation.

The communication and committees' composition evolved over the course of the project as data was reviewed. The identification and assignment of tasks developed to enable community experts to contribute advice and solutions (Dunleavy, 2017). Librarians with particular expertise provided analyses and solutions, propelling discussions and decision making forward. Some of the liveliest and most insightful discussions ensued during the October and November final data review of 2017.

Discovery

Customizing this catalog's unique Encore Duet suite is a significant undertaking for all involved. All catalog records, items, orders, and holdings are attached, or linked to and draw from the MARC (Machine Readable Catalog) encoded bibliographic record, a standard developed in the middle of the 20th century, designed to automate the maintenance of a physical card catalog. Innovative software integrates modules through the main bibliographic record at the core. All of Innovative's cataloging, acquisitions, and serials modules, and create lists and reporting services, draw from the master bibliographic metadata. Transferring that foundation from another integrated library system and redesigning it in Innovative required many extractions and verification processes during the data migration process by all information professionals involved.

Since the bibliographic foundation of the catalog uses MARC tags, most metadata specialists expect MARC indexing instructions to directly inform the OPAC (Online Public Catalog); however, modern discovery layers' capabilities are limited in the interaction with MARC encoding. The three-digit MARC tag identifies how terms and data are indexed, but MARC blocks discovery of known items when researchers use Web search engines. An increasing reliance on proprietary discovery interfaces adds additional considerations when deciphering strategies for Web discovery of library resources. Institutions that use Serials Solutions' Summon and other discovery layers report varying degrees of success and satisfaction. Hudson and Hukill agree, "these products are, by nature, incomplete and incomprehensive" (Hudson & Hukill, 2016).

Bento-Style Catalog Interface

Encore's tab-style catalog interface funnels electronic books, electronic journals, special collections, general circulation books, and other research resources through separately labeled search tabs to provide Florida's community of learners and researchers with a single search library catalog in the bento style (phrase attributed to Tito Sierra) (Rochkind, 2013). The three-tab bento design Innovative provides with the default product produces similar across-tab search results, and the few distinctions in the retrieved search results only confused users who tested this operation. Advanced bento designs can solve the problems of search/retrieval but are expensive to maintain and require systems information professionals on staff at the institution who can properly configure and maintain the search queries' targets.

A major discussion and decision to reduce the number of tabs took place in an e-mail thread. As a result, the University of South Florida requested a customized two-tab design for the final data load testing in October and November 2017, with the sole purpose of intending to eliminate the confusing results users had reported about the three-tab design. This design does not require maintenance from the academic library systems' professional staff. A metasearch "Find it!" tab, with which the University of South Florida community is familiar, has been retained and provides continuity of users' expectations.

Conclusions

Many more libraries expect to reconsider their library management platform service providers in search of more sophisticated data integration, searching, and retrieval as libraries focus on solutions that make the discovery of libraries' resources easier to use and understand for the library user community (Adams Becker et al., 2017).

One authentic competitor in the bibliographic structure marketplace is BIBFRAME, a Web-friendly encoding system that looks more like HTML code that can be expressed in markup languages. Libraries considering changing library management platforms should assess whether any new library management system chosen will accommodate migration from MARC to another bibliographic data entry standard. If BIBFRAME succeeds MARC, for example, even OCLC's more than one billion records will need to be

remediated. BIBFRAME may be a plausible option, since the open source license and interoperability among formats may suit many different types of libraries' needs. Bibliographic data encoded in BIBFRAME is based on relationships between data elements and data element sets, and it can support

linked data discovery using Web browsing, which will be increasingly important as artificial intelligence and machine-to-machine communication play a bigger role in the future of automation of library and Internet services.

References

- Adams Becker, S., Cummins, M., Davis, A., Freeman, A., Giesinger Hall, C., Ananthanarayanan, V., . . . Wolfson, N. (2017). *NMC horizon report: 2017 library edition*. Austin, TX: New Media Consortium. Retrieved April 29, 2017, from <https://www.nmc.org/publication/nmc-horizon-report-2017-library-edition/>
- BIBFRAME initiative. (2017). Retrieved December 2, 2017, from <https://www.loc.gov/bibframe>
- Dong, E., Glerum, M. A., & Fenichel, E. (2017). Using automation and batch processing to remediate duplicate series data in a shared bibliographic catalog. *Library Resources and Technical Services*, 61(3), 143–161.
- Dunleavy, C. (2017). *Data review & communication during Florida Academic Libraries' catalog data migration [poster]*. Retrieved December 8, 2017, from https://schd.ws/hosted_files/2017charlestonconference/ac/Dunleavy.CharlestonDataIntegrationCommunication.pdf
- FALSC working groups. (2017). *Flvcorg*. Retrieved December 8, 2017, from <https://libraries.flvc.org/ils-teams-and-working-groups>
- Hudson, C., & Hukill, G. (2016). One too many: Building a single search interface for disparate resources [adapted from Varnum (Ed.), *Exploring discovery*. ALA, 2016]. Wayne State University Libraries at DigitalCommons@WayneState (114), 141–153. Retrieved December 2, 2017, from <http://digitalcommons.wayne.edu/cgi/viewcontent.cgi?article=1118&context=libsp>
- Jin, Q., Hahn, J., & Croll, G. (2016). BIBFRAME transformation for enhanced discovery. *Library Resources and Technical Services*, 60(4). Retrieved November 28, 2017, from <http://hdl.handle.net/2142/90248>
- MARC standards. (2017). Retrieved December 2, 2017, from <http://www.loc.gov/marc/>
- Rochkind, J. (2013). A comparison of article search APIs via blinded experiment and developer review. *Code4lib*, 19. Retrieved December 2, 2017, from <http://journal.code4lib.org/articles/7738>
- USF Libraries University of South Florida. (2017). Retrieved December 2, 2017, from http://www.lib.usf.edu/?utm_campaign=findit