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Let's Get Technical – The Care and Feeding of Local Data in a ILS Migration

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Let's Get Technical — The Care and Feeding of Local Data in a ILS Migration



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The Situation

In a previous article “A Herculean Task: Cleanup in Preparation for Migrating to a New ILS” (*ATG* v.28#6, Dec.16-Jan.17) we outlined some recommendations for areas to cleanup in preparation for migrating to a new ILS. As we edge closer to implementation and cutover to **Ex Libris’s** Alma and decisions have been made as to how to migrate records and move to a single record environment, other areas of bibliographic data have come to the forefront as areas for examination and potential preparation and cleanup. This is particularly true in areas of local enhancements and local notes in bibliographic records.

After the decision to migrate from **Ex Libris’s** Voyager to Alma, it was decided by our consortia leadership that the bibliographic records from the nine **WRLC** libraries would be merged into a single record environment. Historically within the **WRLC** consortia, each institution has maintained their own bibliographic records. This means, for example, that if five of the nine schools held the same bibliographic record with the same **OCLC** number for a work, there would be five similar records in our shared catalog with the same identifier. While there have been some benefits to this, it has also been relatively inefficient and cumbersome from a discoverability and record and authority maintenance perspective.

The **WRLC** Metadata Committee, comprised of mostly heads of cataloging from each of the schools in the consortia, needed a plan for merging duplicate records while preserving local data. Thus, while also performing cleanup on areas recommended by **Ex Libris** and already identified by the committee, the group began working on making provisions to retain a wide range of local enhancements and customizations from each institution’s individual records prior to the merge. This ranges from retaining local provenance notes to locally added Varying Form of Title (MARC 246) fields, as well as vendor-provided tables of contents fields, and Demand Driven Acquisitions information. **Ex Libris** provides a range of 9xx fields for migrating local data that libraries want to preserve and keep in their institution zones, and the group has worked on defining fields for mapping local data to ensure it is preserved.

With the mapping and migrating plans in place, it is incumbent on each institution to ensure the mapping of the appropriate fields and tag with a \$9 LOCAL to identify and

retain the local fields. As we have discovered in the catalog at **American University**, this can be a challenge because of changing local practices and national standards over time, missing historical institutional knowledge, and even no knowledge of some local notes or collections, especially in Special Collections and Archives. As a result, it can be difficult to locate all the local notes and other fields that we have wanted to keep.

The Process

In the Voyager environment, with the permissions and knowledge we have currently, we have used a couple of methods to perform the identification of records and individual fields that need tagging, as well as the tagging itself. For the identification, one method we have used has been to run reports in Microsoft Access on records to locate local fields that we want to keep. The challenge with this is if the field is not indexed in your system, as is the case with many 5xx notes, running reports can be difficult and time-consuming. It does help if you know the specific field or phrasing you are looking for. Another method is to extract the records and use MarcEdit’s delimited text translator tool or OpenRefine to parse out individual MARC fields into spreadsheets for identification.

Once records with local fields we want to keep are identified, there are a couple of options for tagging fields we want to retain. Moving fields and tagging with the \$9 LOCAL can be performed on the record set within MarcEdit and the records can be reimported and overlaid onto the existing record in the catalog. Alternatively, many ILS’s have a batch change tool that can be used to make these modifications within the records themselves. Voyager has a module called Global Data Change (GDC) that will move, add, or modify fields in both the bibliographic and holdings records, if it has the bibliographic or holdings ID number. This is an exceptionally useful tool in that one can also review changes in a preview mode before they are made in the records, and can set conditions for making changes, so that errors are minimized. GDC also has a function to search for and create sets of records that meet certain parameters, which could probably be used to make changes, though we have not experimented with this feature. At American University, we have used a combination of making batch changes in GDC and MarcEdit and overlaying records to make these modi-

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fictions. Our Metadata librarian has found that it is less efficient to make the changes in OpenRefine and re-convert the files back into MARC.

Additionally, our consortia office has assisted with migrating fields to locally defined fields and adding the \$9 LOCAL tag for records directly on the production server by searching for common phrasing we gave them that we knew were in certain fields. Examples we provided them included “gift of,” “special collections copy,” “signed by,” and “faculty author” in specific fields that we know are heavily used, such as the 541 Source of Acquisitions note, and the 561 Ownership and Custodial History note fields. Although this process has caught and changed at least 20,000 commonly local notes, it did not catch everything, though it was helpful in catching a large chunk of the most common local notes.

One thing to consider when moving certain fields that you want to retain in this type of migration is the impact it could have prior to migration. Depending on the timeline, it could be many months between when you perform these changes and when the actual migration

takes place. In our case, because of merging to a single record and the desire to keep locally added 246 fields in certain areas of the collection, we intend to keep the original 246 and copy it to the locally defined 9xx field, so that it is still searchable, and discoverability is not lost. We are endeavoring to do this for 246 and any other fields containing access points, such as locally added 700 fields containing a donor's name, for example.

Recommendations

Here are a few recommendations to consider when going through a similar process, regardless of whether you are merging records or doing any sort of migration or remediation.

1) Know your local data. It has been a challenge to identify all the local data and notes we wanted to keep. Luckily with experienced staff and indispensable tools such as MarcEdit, it has made the process of finding and mapping local fields easier.

2) Make local data consistent. There have been a variety of practices over time to identify gift notes and local collections, such as a variety of different 5xx fields and local series statements. It is exceptionally helpful to maintain consistent local practices when adding

local notes, including standardized phrasing and consistently using the same 5xx field.

3) Consult with colleagues. Colleagues that work in specific areas, or that have long-standing institutional knowledge are indispensable in helping to identify pockets of materials that may have been treated differently. Additionally, subject specialists may have recommendations for whether or how to keep local enhancements such as specially created 246 fields for varying titles. Talk with your special collections librarians, art, music, and media librarians, and archivists. They may be helpful in identifying areas that need closer examination, or in making recommendations about useful information to preserve or clean up that may not be immediately obvious. Consider making a repository of standard notes used, for both catalogers as well as public services staff to refer to. 🐼

Biz of Acq / The Biz of Digital — Gone with the Old, In with the New

The Disappearance of Library Acquisitions and the Emergence of the E- and the Digital

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Column Editor's Note: *This is the last “Biz of Acq” column and the first “Biz of Digital” column. It's sad to be wrapping up the long-running “Biz of Acq,” but exciting to moving into new territory. Libraries have changed massively since the “Biz of Acq” column began, and dedicated acquisitions librarians, the authors of the column and a large portion of the target audience, are disappearing as libraries shift resources to e-resources and e-resource management, discovery services, digital special collections, and digital scholarship (services). The new column will cover the wide array of facilities, equipment, systems, and services that support digital collections and digital scholarship. Following the tone set by “Biz of Acq,” as a “Biz” column, the goal will be to provide digital collections and digital scholarship librarians, and the vendors of systems, equipment, and services to support them, with current information on events in the field, and practical insights into techniques and process by working librarians. My hope is that it will eventually be joined by a sister column or two covering the “Biz” of e-resource management and discovery services. — MF*

The Disappearance of Library Acquisitions

The “Biz of Acq” column is a longstanding feature in *Against the Grain*, but it has become increasingly difficult to find authors willing to write for the column. The authors for “Biz of Acq” are generally working

librarians, and there are simply far fewer working acquisitions librarians than there once were. With the switch to e-resources well on its way to completion, positions for acquisitions librarians are morphing into positions for electronic resource managers. With the popularity of eBook packages and PDA or DDA (patron driven acquisition or demand driven acquisitions), even the title-by-title purchase of monographs is being whittled down to nothing, leaving small units that don't need dedicated managers. LSPs (Library Service Platforms — the next generation ILSs) allow for flexible workflows joining acquisitions and cataloging into one unified function so that the person doing acquisitions is no longer needed. Combining acquisitions with other units such as interlibrary loan and collection management streamlines workflows, making it increasingly popular for acquisitions to be consumed by a greater or larger concept. Acquisitions Librarians retire or move on and their positions are re-purposed, or they pick up new work and expertise, and the position that they're in is re-purposed to new area they've been working in. Mandatory moves to different positions or downsizing are also possible, although I haven't heard of an acquisitions librarian being downsized or being forced to move to a new position.

My medium sized library once had two professional librarians dedicated to acquisitions — a serials librarian and an acquisitions librarian managing monographic acquisitions. With the retirement of the serials librarian, our professional e-resources cataloger and discovery services

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