440   0 |a Explorations in sociology |v v.62 |5 FTS
490   0 |a Explorations in sociology |v v.62 |5 FBoU |5 FU
490   1 |a Explorations in sociology ; |v 62 |5 FTaFA |5 FMFIU |5 FTaSU
504 |a Includes bibliographical references (p. 247-263) and index.

FBoU |5 FTaFA |5 FTS |5 FU

|a Bollingen series, 35:10. The A. W. Mellon lectures in the fine arts |5 FTaSU
|a Bollingen series, 35. The A. W. Mellon lectures in the fine arts, 10 |5 FSsNC |5 FMFIU |5 FJUNF
|a Bollingen series, 35:10 |5 FOFT
|a Bollingen series, 35. The A. W. Mellon lectures in the fine arts, |v 10 |5 FFmFGC
|a Bibliography: p. 149-158 (2d group) "Illustrations": p. [1]-[203] (3d group)
|a The first steps. -- The assimilation of contemporary imagery. -- The portrait. -- The historical scene. -- Dogmas expressed in a single ima

490   1
490   1
490   1
490   1
504   0 |a Art, Early Christian
505   0 |a Christian art and symbolism
650   0 |a Bollingen series, |v 35.
650   0 |a A.W. Mellon lectures in the fine arts ; |v 10.
830   0 |a A.W. Mellon lectures in the fine arts.
830   0 |a The A. W. Mellon lectures in the fine arts ; |v 1961
830   0 |a The A. W. Mellon lectures in the fine arts ; |v 10
830   4 |a The A. W. Mellon lectures in the fine arts, |v 10
830   4

440   0 |a Reprints of economic classics |5 FMFIU |5 FU
440   4 |a The Adam Smith library |5 FMFIU
490   0 |a Reprints of economic classics |5 FJUNF |5 FTaFA |5 FPeU
490   0 |a The Adam Smith library |5 FJUNF |5 FTaFA |5 FPeU |5 FU

CATACODERS

Tech-Savvy Catalogers Remediate Messy Series Fields to Alleviate Display
Issues in the State University System of Florida Libraries Consortial Interface

Presented by Annie Glerum and Ethan Fenichel

at

MASHCAT 2016

Boston, Massachusetts
January 13, 2016

OVERVIEW

I. Multiple-Series Cleanup Task Force

II. Issues with initial merge into "Shared Bib"

III. Analysis of local and OCLC records

IV. Implementation of batch overlays

V. Advantages of being "catacoders"

TASK FORCE

TASK FORCE

Multiple-Series Cleanup Task Force

- BCDS ⇨ CAM ⇨ CSUL

- *Guidelines and Procedures for the Shared Bibliographic Catalog*

- Differing tracing practices

- Multiple 4XX fields in shared records

In a library catalog database, **quality** bibliographic description provides both accurate and sufficient enough data such that the library user can **discover** the description, **identify** the resource, and then **determine** whether that resource fulfills the user's needs.
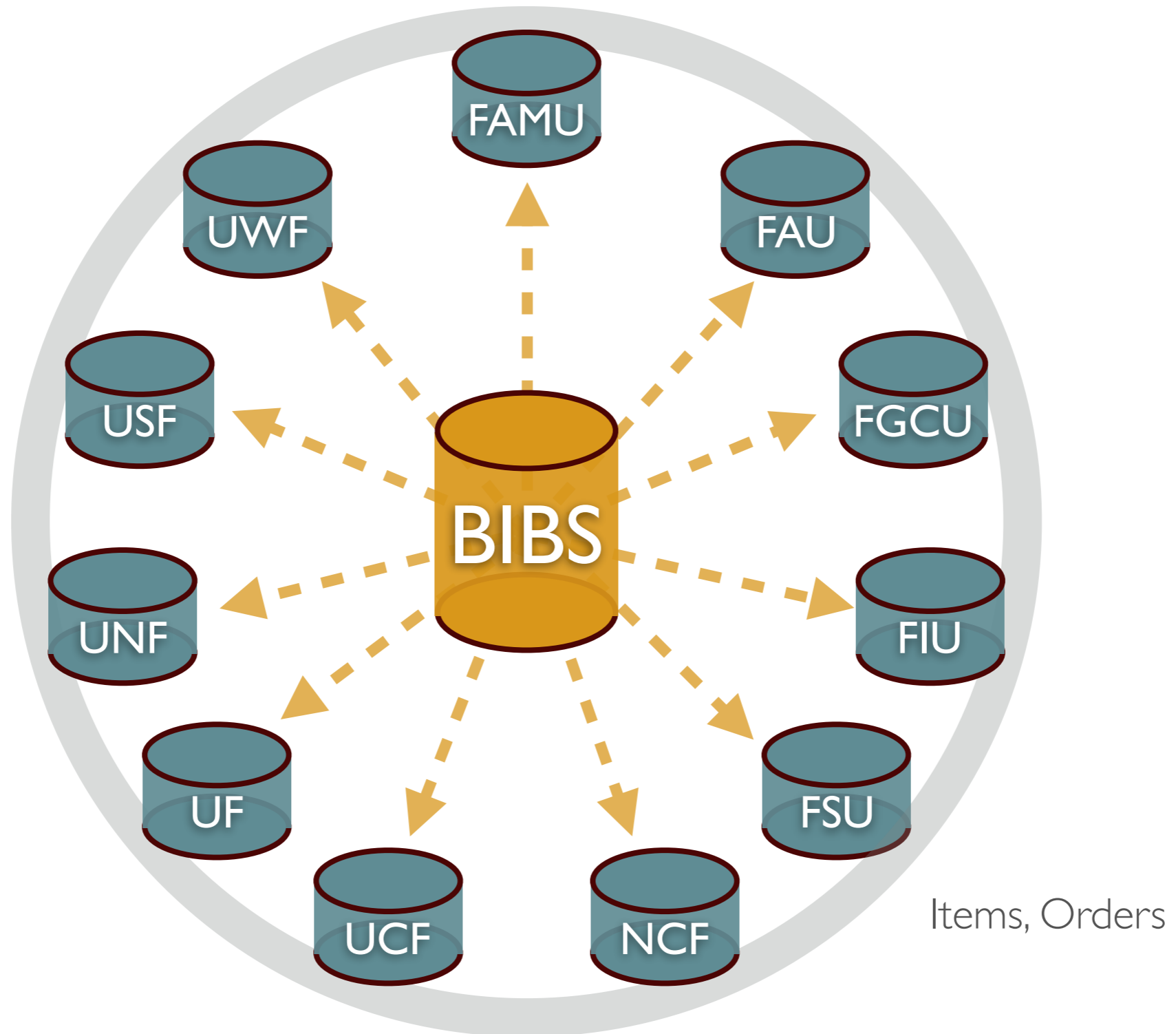
ISSUES

ISSUES

Initial Shared Bib merge

- All eleven universities' libraries sharing one DB

ONE **SHARED BIB** DB

BIBS

FAMU
FAU
FGCU
FIU
FSU
NCF
UCF
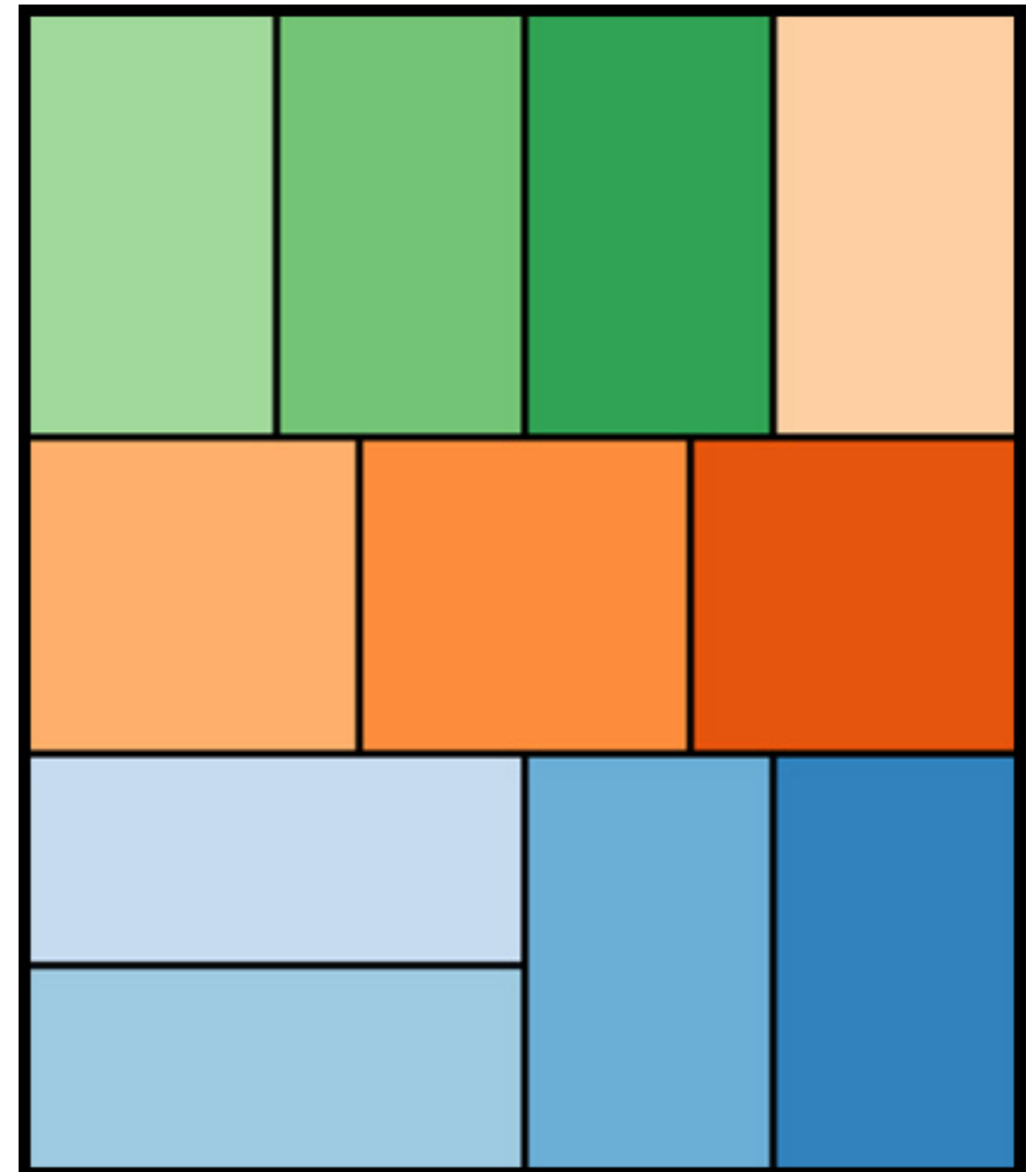UF
UNF
USF
UWF

Items, Orders

ISSUES

However…

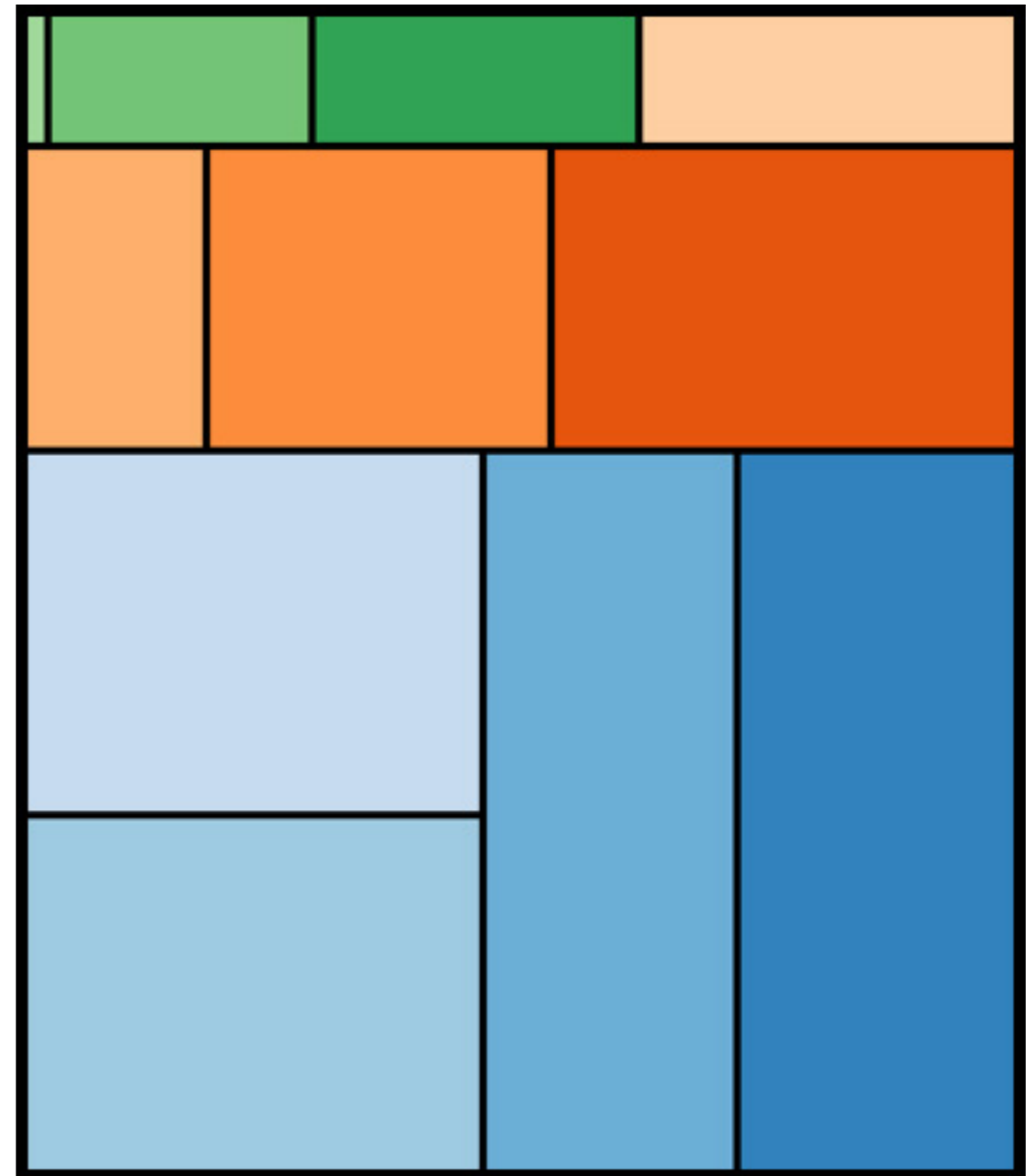*We know all universities are not created the same*

ELEVEN UNIVERSITIES

- Florida Agricultural and Mechanical University
- Florida Atlantic University
- Florida Gulf Coast University
- Florida International University
- Florida State University
- New College of Florida
- University of Central Florida
- University of Florida
- University of North Florida
- University of South Florida
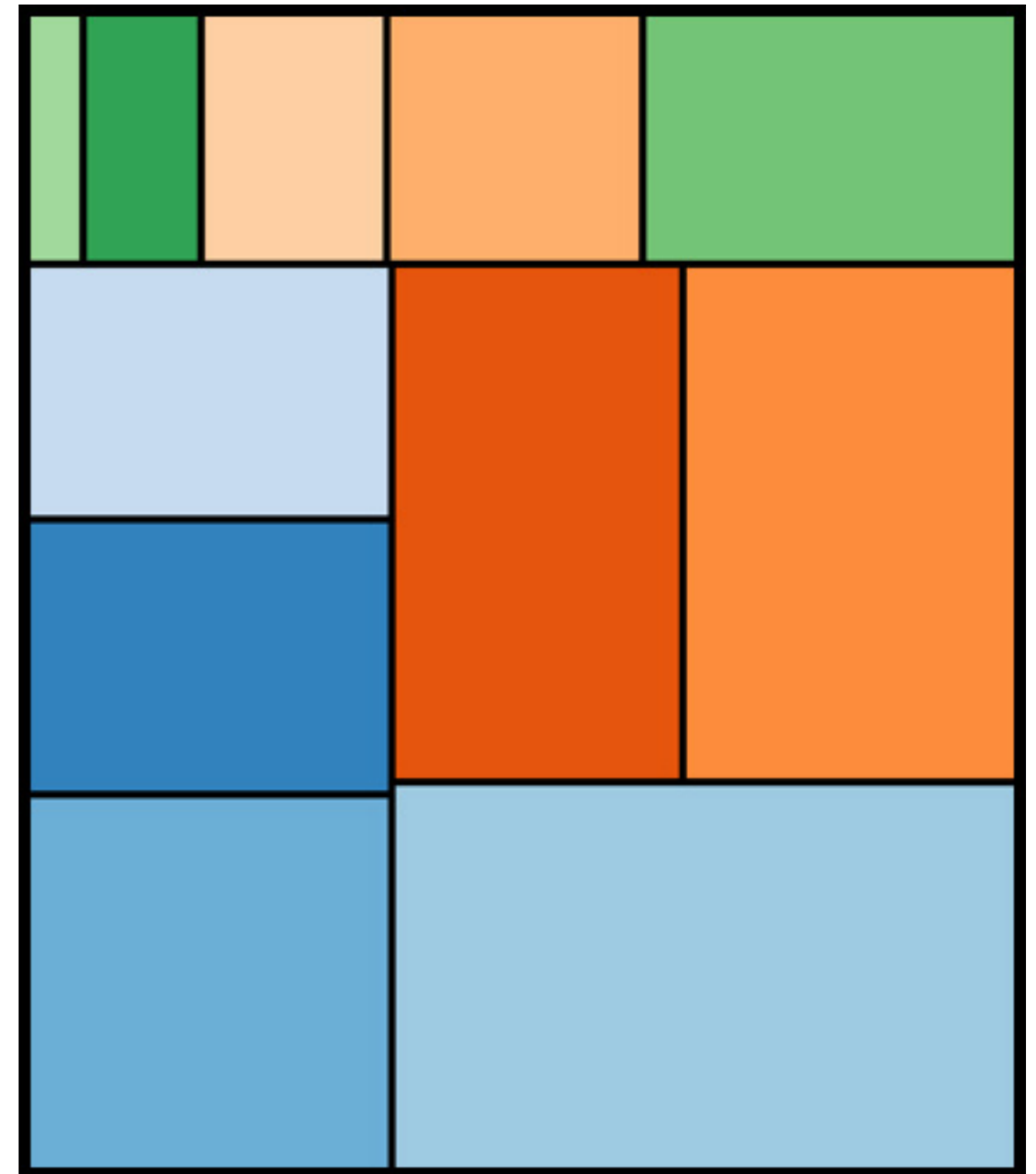- University of West Florida

ELEVEN STUDENT BODIES

- Florida Agricultural and Mechanical University
- Florida Atlantic University
- Florida Gulf Coast University
- Florida International University
- Florida State University
- New College of Florida
- University of Central Florida
- University of Florida
- University of North Florida
- University of South Florida
- University of West Florida

ELEVEN COLLECTIONS

- Florida Agricultural and Mechanical University
- Florida Atlantic University
- Florida Gulf Coast University
- Florida International University
- Florida State University
- New College of Florida
- University of Central Florida
- University of Florida
- University of North Florida
- University of South Florida
- University of West Florida

ISSUES

Initial Shared Bib merge

- Eleven universities sharing one bib database

- FLVC and CSUL SB Working Group erred on the side of caution to protect local data

  - *Used* $5 `[MARC Org Code]` *to protect fields and trigger display*

  - *Resulted in duplicated "near-match" data*

ISSUES

In MARC records

- Differing transcriptions

- Incorrect subfield coding

- Incorrect ISBD punctuation

- Use of obsolete 440 fields

- Varying tracing practices

490 1_ $a Bollingen series, 35:10. The A.W. Mellon lectures in the fine arts $5 FTaSU

490 1_ $a Bollingen series, 35. The A.W. Mellon lectures in the fine arts, 10 $5 FSsNC $5 FMFIU $5 FJUNF $5 FPeU $5 FBoU $5 FTaFA $5 FTS $5 FU $5 FSsNC

490 1_ $a Bollingen series, 35:10. $5 FOFT

490 1_ $a Bollingen series, 35. The A.W. Mellon lectures in the fine arts, $v 10 $5 FFmFGC

[...]

830 _0 $a Bollingen series, $v 35.

830 _0 $a A.W. Mellon lectures in the fine arts ; $v 10.

830 _0 $a A.W. Mellon lectures in the fine arts.

830 _4 $a The A.W. Mellon lectures in the fine arts ; $v 1961.

830 _4 $a The A.W. Mellon lectures in the fine arts ; $v 10.

440 _0 $a Reprints of economic classics $5 FMFIU $5 FU

440 _4 $a The Adam Smith library $5 FMFIU

490 0_ $a Reprints of economic classics $5 FJUNF $5 FTaFA $5 FPeU

490 0_ $a The Adam Smith Library $5 FJUNF $5 FTaFA $5 FPeU $5 FU

440 _0 $a Explorations in sociology $v 62. $5 FTS

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490 _0 $a Explorations in sociology $v 62. $5 FBoU $5 FU

490 _1 $a Explorations in sociology $v 62.

ISSUES

In Mango OPAC Display

- If every 490 has a $5, then the field does not display in union Mango

- If both 440 and 830 are present, then both series display in union and local Mango

- If a correct field has another library's $5 code, then it doesn't show in local Mango

Shared MARC

440 _0 $a Essays in history, economics, & social science, $v 8 $5 FTS

440 _0 $a Burt Franklin research & source works series, $v 163 $5 FTS

490 0_ $a Burt Franklin research & source works series #163 $5 FPeU

490 1_ a Essays in history, economics, & social science #8. $5 FJUNF $5 FPeU

[…]

830 _0 $a Burt Franklin research & source works series |v no. 163

830 _0 $a Selected essays in history, economics, & social science, $v 8.

Union Mango

Author, etc.:
Walford, Cornelius 1827-1885

Title:
Fairs, past and present; a chapter **in** the **history** of commerce.

Published:
New York, B. **Franklin**, 1967.

Description:
x, 318 p. 22 cm.

Series:
Burt Franklin research & source works series no. 163
Selected essays in history, economics, & social science, 8.
[…]

USF Mango

Author, etc.:
Walford, Cornelius 1827-1885

Title:
Fairs, past and present; a chapter in the history of commerce.

Published:
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Burt Franklin research & source works series, 163
Essays in history, economics, & social science, 8
Selected essays in history, economics, & social science, 8.
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490 1_ a Essays in history, economics, & social science #8. **$5 FJUNF $5 FPeU**

[...]

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New York, B. **Franklin**, 1967.

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No Series note!

Series:
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[...]

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Description:
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440 headings!

Series:
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[…]

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Missing series statement!

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Series:
Burt Franklin research & source works series no. 163
Selected essays in history, economics, & social science, 8.
[…]

ANALYSIS

ANALYSIS

- FLVC generated a CSV file of records with multiple 4xx fields *(209,671 rows)*

- Analyzed report & catalog records

- Initial idea was that catalogers would correct each record

- Explored feasibility of automating the decision process and cleanup

MarcEdit
Excel
Python

ANALYSIS

Comparing local and OCLC Records (master)
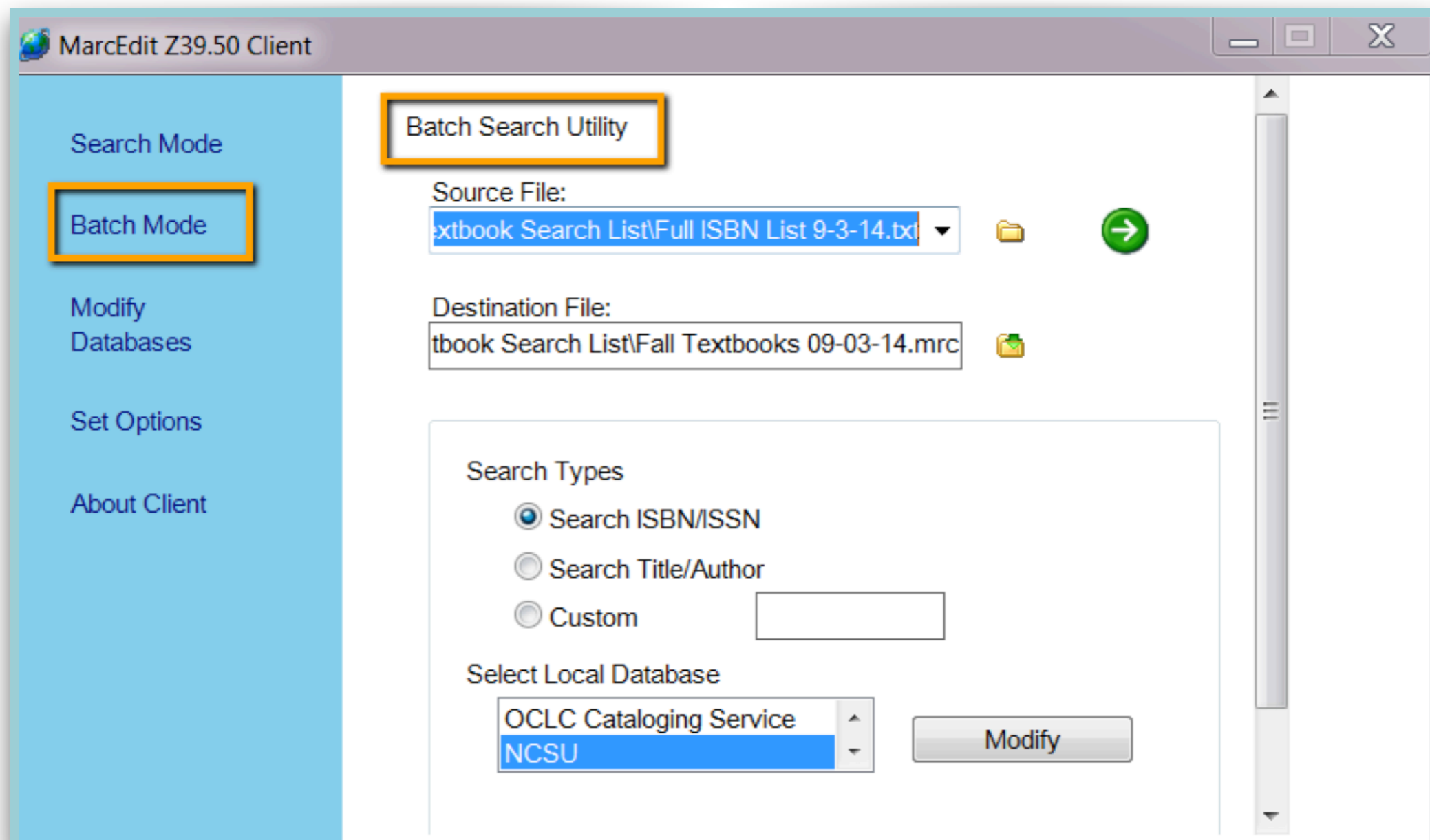
- A given record from our catalog with *certain attributes*

- Compare *contents* to the master record and if it met *certain criteria*, we would overlay our local record with the master

- How to download the records from OCLC?

ANALYSIS

- Generated a 1000 record sample set
  - *Excel VBA macro (MOD(ROW(),209)=1)*
- Pulled sample set of records from catalog
  - *Analyzed and categorized records using Excel and MarcEdit*
  - *Identified potential local series and other cases we wouldn't want to overlay*
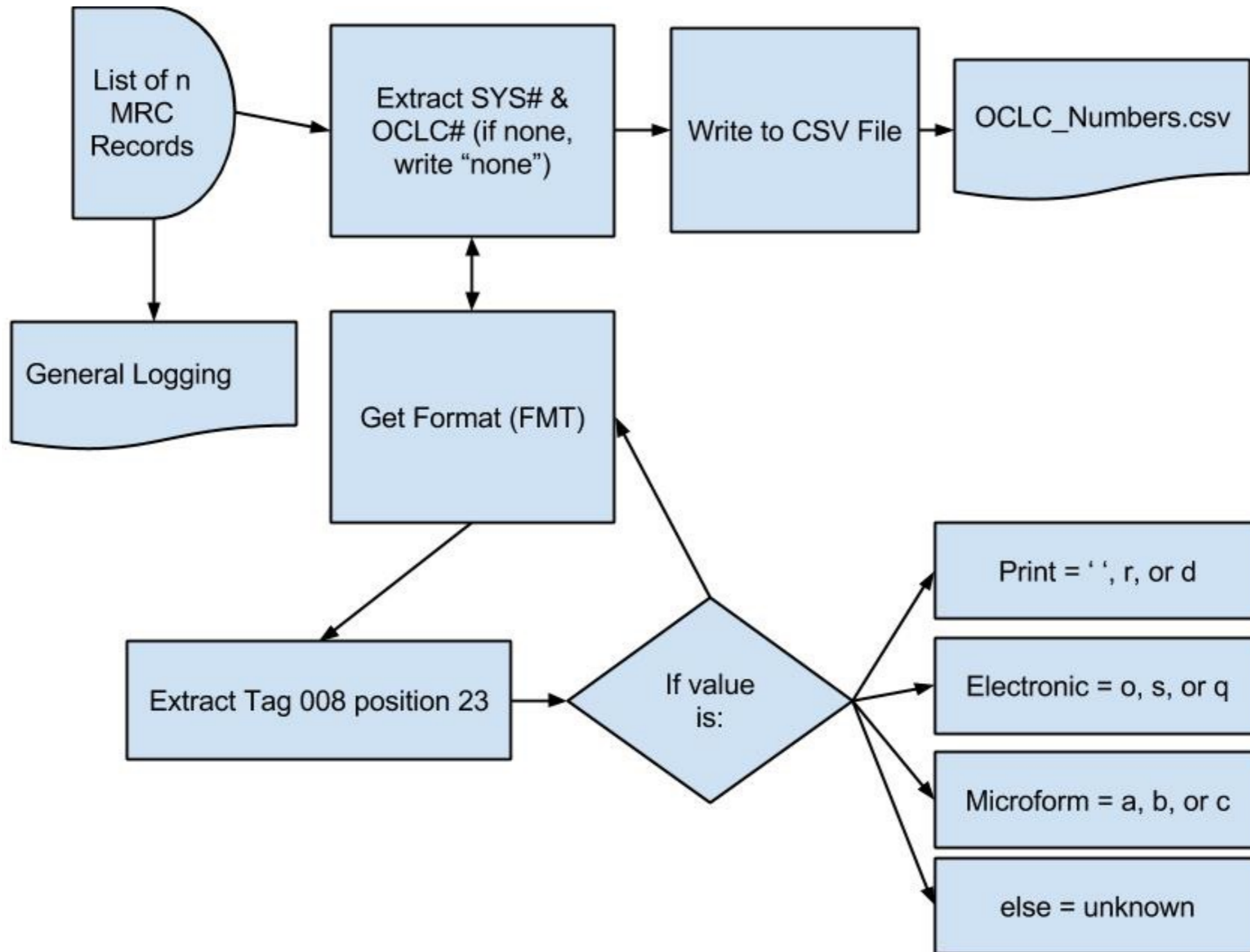
ANALYSIS

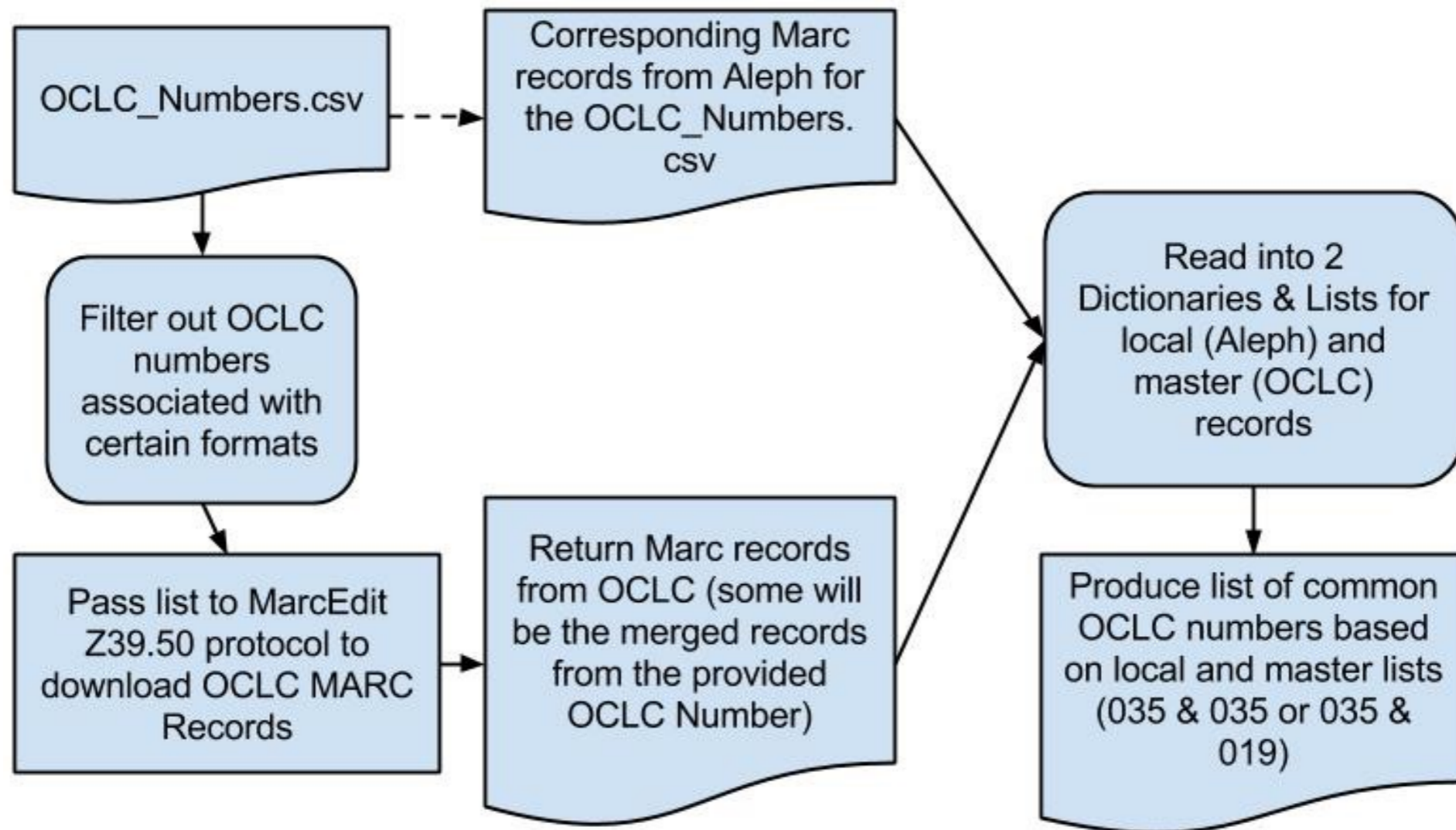Pulled batches of OCLC records with MarcEdit's Z39.50 utility
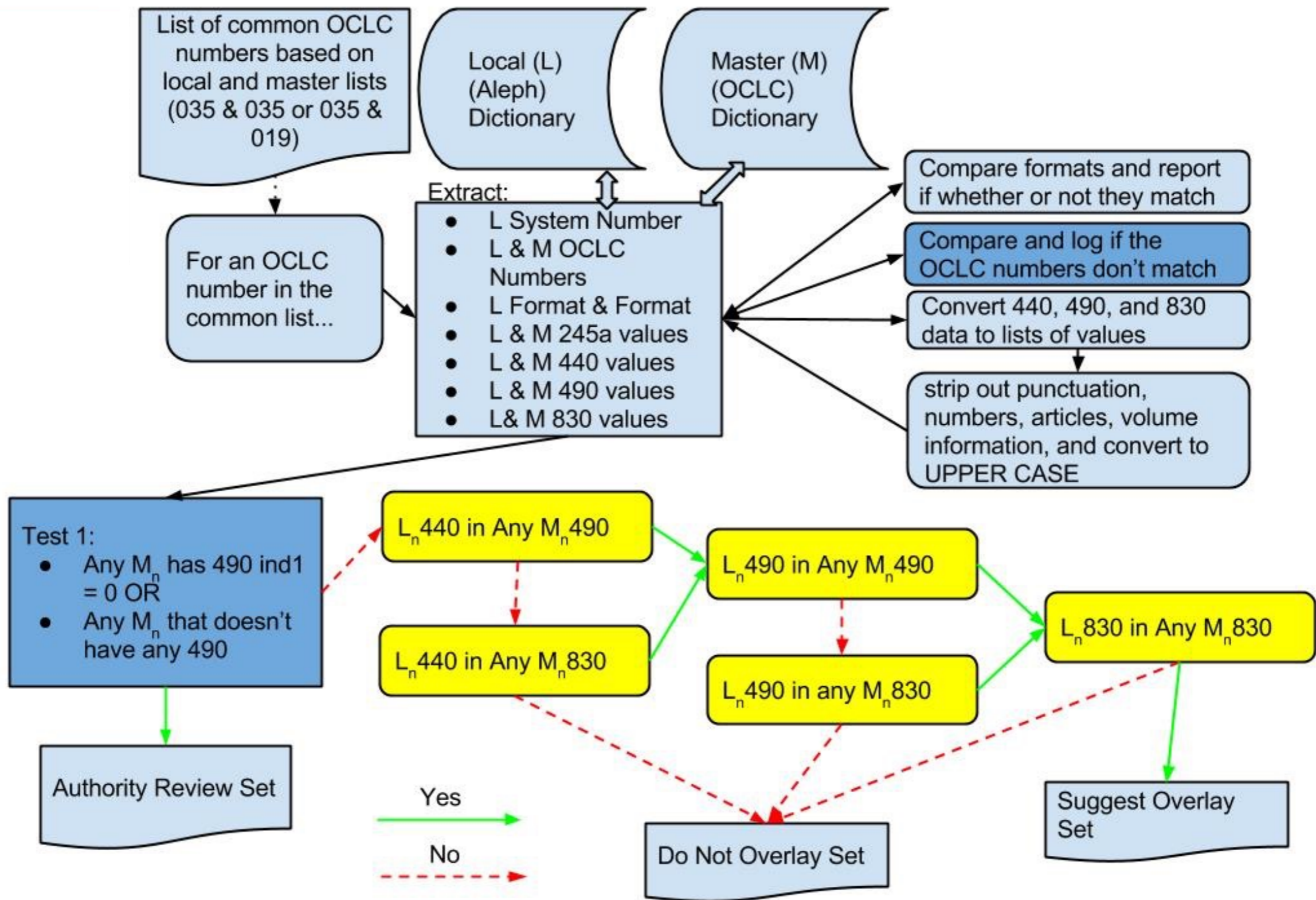
ANALYSIS

Refining the Python script

- Developing with a little help from my friends:
  - *PyMarc Google Group*
    eg: Diacritics ⇨ *á, é, í, ó, ú, ü, ñ*

  - *Twitterverse*

- Diagrammed the decision making process using Google Drawings

Decision Tree 1: Preprocessing

Decision Tree 2: Comparison

Decision Tree 3: Iterative compare

ANALYSIS

https://github.com/EthanDF/FLVC_490_Duplicates

ANALYSIS

Testing the Python report

- Ran test of 1000 records

- Refined the script

- Confirmed automated process was feasible

- Ran test of 10,000 records
  - *Ruled out additional changes*
  - *Tested computer's processing limit*

IMPLEMENTATION

IMPLEMENTATION

Preparing for implementation

- Presented project update to BCDS

- Pulled 23 batches of MARC catalog records

- Refined the workflow and scripts

- Configured batchloading profile
  - *Selected fields to keep*
  - *Got approval by FLVC*

IMPLEMENTATION

Fields to keep in the catalog record

MARC TAG	MARC TAG	MARC TAG	MARC TAG	MARC TAG
351	541	690	797	909
500	545	691	845	951
501	561	699	856	
506	562	710	896	
520	563	790	897	
533	583	791	898	
540	584	796	899	

655_7 $2	rbprov	rbbin	rbgenr	rbpap	rbpri	rbpub	rbtyp	local

COMPLETION!

Following a feedback and review period…

Within two weeks 51,818 local records were overlaid with OCLC master records

CATACODERS

CATACODERS

Being a "tech-savvy" cataloger…

- Allows for independence in developing custom solutions on your time schedule

- Facilitates communications with computer programmers and other technology staff

- Develops essential skills for library linked data environment and future discovery tools

"The code4lib community talks about getting catalogers and coders together, and wonders if catalogers should be taught to code. The problem, however, is not between coders and catalogers but is systemic in our profession.

We have kept cataloging and computer technology separate, as if they aren't both absolutely necessary. One is the chassis, the other the engine, but **nothing useful can come off the assembly line unless both are present** in the design and the creation of the product."

–Karen Coyle

http://kcoyle.blogspot.com/2015/05/catalogers-and-coders.html

RESOURCES

SOURCES

Project documentation. https://sharedbib.pubwiki.fcla.edu/wiki/index.php/
Cataloging#Multiple_Series_Fields_Cleanup

Project Github. https://github.com/EthanDF/FLVC_490_Duplicates

All about Genload. https://fclaweb.fcla.edu/node/521

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Frank, Heidi. *Augmenting the Cataloger's Bag of Tricks: Using MarcEdit, Python, and PyMARC for Batch-Processing MARC Records Generated From the Archivists' Toolkit.* http://journal.code4lib.org/articles/8336

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McDanold, Shana L. *CodeYear Catalogers.* Blog Post on CatCode, January 3, 2012. http://slmcdanold.blogspot.com/2012/01/codeyear-catalogers.html

Schwartz, Christine. *Catalogers, metadata librarians, digital humanists and coding.* Blog Post on Cataloging Futures, July 29, 2013 http://www.catalogingfutures.com/catalogingfutures/programming/

ACRONYMS

BCDS = Bibliographic Control and Discovery Subcommittee

CAM = Cataloging, Authorities, and Metadata Committee

CSV = Comma Separated Values

CSUL = Council of State University Libraries [of Florida]

DB = database

FCLA = Florida Library Automation Center

FLVC = Florida Virtual Campus

ISBD = International Standard of Bibliographic Description

OCLC = Online Computing Library Center

MARC = MAchine-Readable Cataloging

SB = Shared Bib [i.e. The Shared Bib Catalog]

MULTIPLE-SERIES CLEANUP TASK FORCE

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State University System Libraries of Florida

http://union.discover.flvc.org/