FLVC Analysis of Effort Required for TSSC Projects
2/13/2015

FLVC library support services staff met at the FLVC Tallahassee office on Tuesday Feb. 11, 2015 to discuss data cleanup issues in Aleph. The primary focus was on the TSSC project list.

We discussed the scope of each project and the effort, staff and time to do them. Here are our best estimates of the requirements. The time estimates are for elapsed time.

Current FLVC projects for TSSC or other technical services committees

- Centralized link-checking for the SUS
  1. Review existing process for colleges for application to SUS – 2 librarians – 1 week
  2. Identify links in SUS records exclude from checking – 1 librarian – 1 week
  3. Modify college process for the SUS – 2 librarians – 1 month
  4. Manually fix links – 2 librarians, SUS library staff – ongoing
  Total elapsed time:  6 weeks

- Transfer local fields and notes from records in UXU10 to corresponding records in LCA10
  1. Identify specs for which fields to move – 1 librarian, library staff – 2 weeks
  2. Test process to extract fields from UXU10 and load into LCA10 – 1 librarian – 1 month
  3. Modify and test LCA10 loaders to protect local fields – 2 librarian, SUS library staff – 1 month
  4. Move to production – 2 librarians, 1 month
  Total elapsed time:  14 weeks

- Change p_file_90 and GenLoad to include material format (e.g. print, electronic) in matching
  The p_file_90 changes are covered in the CAM list. Only the GenLoad changes are addressed here.
  1. Discussion with developer to come up with specs and evaluate feasibility of project – 2 librarians, 1 programmer – 3 weeks
  2. Program changes – 1 programmer – 1 month
  3. Test changes – 2 librarians – 2 weeks
  4. Release to production – 2 librarians – 1 week
  5. Roll out changes to the SUS library staff – 2 librarians – 1 week
  Total elapsed time:  11 weeks

- ISBNs (e.g., ebrary, Coutts)
  Assumption is that this refers to ISBN matching for dataloads, where print may match e-, or records for purchases may match PDA/xDA discovery records. The print vs e- matches are addressed in the previous project and #5 on the CAM list. The purchased record matching on discovery records is addressed by loading discovery records into PDA01. We did not identify other issues for this project.

- Change 035_9 to 035_
  1. Run 035_9 report with library holdings – 1 librarian – 1 week
  2. Obtain specs from library staff – 1 librarian – 1 month
  3. Re-rerun report for library staff – 1 librarian – 1 week
  4. Fix records in batch or manually as appropriate – 2 librarians, SUS library staff – ongoing
  Total elapsed time:  6 weeks
- Change 85641 to 85640 for licensed e-resources
  
  *Already in progress*

**Proposed projects from “CAM Response to Shared Bib Problems and Issues Task Force”**

- Cleanup of existing records: work with FLVC to identify non-OCLC record sets with OCLC numbers in the 035.

  **Phase 1: multiple 035 fields, single holding**
  1. Identify records with multiple 035 fields, at least one of which contains (OCoLC) and at least one of which does not contain (OCoLC). Identify records with these 035 fields and a single holding – 1 librarian – 1 week
  2. Analyze for patterns; identify subsets – 3 librarians – 1 month
  3. Identify criteria for handling the records – 3 librarians, SUS library staff – 1 month
  4. Analysis to determine if this is an OCLC record, i.e. should the OCoLC 035 be flipped to 599, or should the non-OCoLC 035 be flipped – 3 librarians – 1 month
  5. Run global changes to flip the 035s appropriately – 1 librarian – 6 weeks

  Phase 1 total elapsed time: 19 weeks

  **Phase 2: multiple 035 fields, multiple holdings**
  1. Identify records with multiple 035 fields, at least one of which contains (OCoLC) and at least one of which does not contain (OCoLC). Identify records with these 035 fields and more than one holding – 1 librarian – 1 week
  2. Analyze for patterns; identify subsets – 3 librarians – 3 months
  3. Identify criteria for handling the records – 3 librarians, SUS library staff – 3 months
  4. Analysis to determine if this is an OCLC record, i.e. should the OCoLC 035 be flipped to 599, or should the non-OCoLC 035 be flipped – 3 librarians – 2 months
  5. Run global changes to flip the 035s appropriately – 1 librarian – 2 months
  6. Analysis to determine if other phases are needed; repeat reports – 1 librarian – 1 week

  Phase 2 total elapsed time: 42 weeks

  Total elapsed time for Phases 1 and 2: 61 weeks

- Create centralized clearinghouse for vendor loads done by the SUS libraries.
  1. Obtain specs from library staff on fields and columns for spreadsheet – 1 librarian – 2 weeks
  2. Create and post Google pre-populated spreadsheet for all to use – 3 librarians – 1 month
  3. Review prototype with TSSC – 1 librarian – 2 weeks
  4. Market to SUS library staff – 2 librarians – 2 weeks

  Total elapsed time: 10 weeks

- If possible, identify those holdings incorrectly attached to vendor records based on the presence of the OCLC number and move holdings to an appropriate OCLC record.
  1. Obtain specs from SUS library staff – 2 librarians – ongoing
  2. Identify target records, e.g. ones that contain multiple 533 fields – 1 librarian – ongoing
  3. Analyze records to determine the holdings that should not be on the bibs – 3 librarians, SUS library staff – up to 2 months per identified group
  4. Download new OCLC records and move appropriate holdings to them; determine if proprietary record sets need to be reloaded from scratch – 3 librarians, SUS library staff – ongoing

  Total elapsed time: this will be an iterative, long-term, ongoing process
• Work with FLVC to document progress on centralized batch load records for SUS and FCS
  1. Identify parameters needed for report (e.g. fields, filters) – 2 librarians, SUS and FCS library staff – 1 week
  2. As records are loaded, output a file to be used in populating the spreadsheet – 1 programmer, 1 librarian – 1 month
  3. Update interim spreadsheet manually – 1 librarian – ongoing
  4. Create database for permanent report solution – 1 programmer – 1 month
  5. Automate the updating of the report database – 1 librarian – 1 month
Total elapsed time: 13 weeks

• Explore possibilities for adding constraints to matches (e.g. requiring matches to be made only against records with the same format as the incoming record)
  1. Conference call with Harvard to discuss Aleph fix created for them – 2 librarians – 2 weeks
  2. Test suggestions from Harvard – 2 librarians – 1 month
  3. If needed, consult with Ex Libris to discuss Harvard fix – 2 librarians – 2 weeks
  4. Test suggestions from Ex Libris – 2 librarians – 1 month
Total elapsed time: 12 weeks

Other projects to be considered
• Change 85641 to 85640 for licensed e-resources for the colleges
  1. Load scripts will be changed to discontinue creating eBook records with 85641 – 1 librarian – 1 day
  2. FCS eBook records will be identified – 1 librarian – 1 day
  3. Batch changes will be run to change 85641 to 85640 – 1 librarian – 1 month
Total elapsed time: 4.5 weeks

• Clean up HOLs converted from DRA to Aleph for the colleges
  1. Identify records – 1 librarian – 1 week
  2. Delete extraneous data – 1 librarian – 1 month
Total elapsed time: 5 weeks

• Clean up old ACQ-CREATED and CIRC-CREATED records for the colleges
  1. Identify records – 1 librarian – 1 week
  2. Create help sheet about cleaning up records – 1 librarian – 1 week
  3. Analyze data – FCS library staff – 1 month
  4. Clean up records – FCS library staff – 1 month
Total elapsed time: 10 weeks

• Consistent treatment of eResources across the FCS and SUS
  1. Identify current status of eResource records (e.g. how authentication is handled, which fields are used, etc.) – 4 librarians – 2 weeks
  2. Determine options for handling eResource records – 4 librarians – 1 month
  3. Test options – 4 librarians – 1 month
  4. Determine method of handling eResources – 2 librarians, TSSC – 1 month
  5. Implement (batch change records) – 1 librarian – 1 month
6. Communicate changes to FCS and SUS library staff (e.g., help sheet, Collaborate session) – 2 librarians – 2 weeks
Total elapsed time: 20 weeks

- Consistent definition of format types in bibs across the FCS and SUS (e.g., book, eBook, streaming video)
  1. Identification of all format types used by FCS and SUS – 1 librarian – done
  2. Determine which format types to use – 1 librarian, TSSC – 2 months
  3. Change Aleph configuration tables – 2 librarians – 2 weeks
  4. Reindex bibs to reflect updated format definitions – 2 librarians – 2 months
  5. Reconfigure Mango to use the new format types – 2 programmers – 2 weeks
Total elapsed time: 12 weeks

- Clean up copy data in item record enumeration fields to support accurate UBorrow requests
  1. Identify item records with values in enumeration field – 2 librarians – ongoing
  2. Analyze records to determine which need to be cleaned up – 2 librarians – ongoing
  3. Clean up records – 2 librarians, SUS and FCS library staff – ongoing
Total elapsed time: this will be an iterative, long-term, ongoing process