Optimizing Catalog Metadata

ENSURING DISCOVERY AND ACCESS IN OUR LIBRARIES

Presented By

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Overview

- Why Clean Data Matters

- MCCC Use Case

- Optimizing Your Catalog

- Questions for Panel

Poll:

With recent changes in library operations, what barriers to discovery and access have you seen in your institution's metadata?

Clean Data Matters

WHY?

- Successful discovery to answer questions and solve problems

- Uncompromised access to digital/electronic content

- True reflection of library holdings and access

Clean Data Matters

WHY NOW?

- Remote patron access is going to be the norm in some libraries for months to come

- Increased urgency to support distance learning

- Data assessment and catalog analysis can be undertaken by library staff working remotely

Monroe County Community College Use Case

MCCC Use Case

- At Monroe County Community College, we need to reclassify from Dewey to LC.

- Manage changes to print/media MARC records (call number/item records)

- Relabel print/media call numbers for print/media collections

Examples

LDR   01456cam a2200397 4500
▼dNETUE▼dOCLCQ▼dCTD▼dOCLCO▼dOCL
▼dERR▼dIOW▼dOCLCO▼dCPO▼dOCLCO
019
▼a83305043▼a989585421▼a102022809
8
029 1 ▼aAU@▼b000000695625
029 1 ▼aAU@▼b000042835714
029 1 ▼aNZ1▼b3648710
035
▼a(OCoLC)00000521▼z(OCoLC)83305043▼
z(OCoLC)989585421▼z(OCoLC)1020228098
037   ▼c5.95.
050 00 ▼aQA95▼b.G33
082 00 ▼a793.7/4
049   ▼aMAIN
100 1 ▼aGardner, Martin,▼d1914-2010.
245 14 ▼aThe unexpected hanging,▼band
other mathematical diversions.
260   ▼aNew York,▼bSimon and
Schuster▼c[1969]
300   ▼a255 pages▼billustrations▼c23 cm
336   ▼atext▼btxt▼2rdacontent
337   ▼aunmediated▼bn▼2rdamedia
338   ▼avolume▼bnc▼2rdacarrier
504   ▼aIncludes bibliographical references
(pages 245-255).

Existing LHR
LDR   00291cx a2200121zi 4500
001   276684734
003   OCoLC
004   ocm00000521
007   zu
008   1903062u 8 4001abeng0200322
014 1 ▼a(Sirsi) u37747▼bEVV
852 1 ▼aEVV▼bEVVA▼cStacks
▼h793.74 G227u▼t1
876
▼c$5.95▼p33131000114284▼x10/69▼xAL
ANAR

New LHR
LDR   00289cx a2200121zi 4500
001   276684734
003   OCoLC
004   ocm00000521
007   zu
008   1903062u 8 4001abeng0200322
014 1 ▼a(Sirsi) u37747▼bEVV
852 1 ▼aEVV▼bEVVA▼cStacks
▼hQA95▼i.G33▼t1
876
▼c$5.95▼p33131000114284▼x10/69▼xAL
ANAR

MCCC Use Case

- Reached out to Backstage Library Works early in the planning process

- Requested samples to determine data quality and validate workflows

- Looked for response to questions about impacts of changes on search patterns, etc.

MCCC Use Case

Beyond the Dewey-to-LC reclass project, there is the bigger picture motivation **to assess materials metadata quality** and its ongoing impact on materials search/discovery (especially for virtual collections).

MCCC Use Case: Virtual Shelf Browsing

MCCC Use Case

How can companies like Backstage help us to answer data quality-related questions posed by?

Online Audiovisual Catalogers (OLAC) Streaming Media Video Acquisitions and Cataloging Survey

https://pages.uoregon.edu/kelleym/survey/OLAC_streaming_video_acquisitions_and_cataloging_survey.pdf

Do you alter or enhance vendor- or third party-supplied records for individua titles in any way prior to loading them into your ILS or do any clean up post- apply)

- ☐ Do not modify records
- ☐ Correct MARC tagging errors
- ☐ Correct character encoding issues
- ☐ Convert records from MARC8 to UTF-8 or vice versa
- ☐ Perform mass edits of format-related fields (e.g., form fixed field 006/007/245$h/300/336/337/338/538/655 for streaming video or online
- ☐ Update formatting of name headings (such as inverting names i Authority File)
- ☐ Update name headings to match standardized forms, such as LC
- ☐ Add or correct relationship designators or relator codes
- ☐ Update topical subjects to match standardized vocabulary or loca
- ☐ Update genre-form headings to match standardized vocabulary or
- ☐ Add or edit fields relating to access or rights (506, 540, public perfe rights)
- ☐ Add or correct fields for non-topical aspects of streaming video (su country of producing entity or 046$k for original date)
- ☐ Add or correct fields related to accessibility (such as 546 or genre-fo like "Video recordings for the hearing impaired")
- ☐ Remove fields that apply only to the DVD or other tangible version (s information about guides or special features)
- ☐ Modify URL in 856 to add proxy or other institution-specific informatio loading
- ☐ Edit record identifiers in 001 or 035 (add or reformat OCLC numbers o identifiers)
- ☐ Add other local fields (for tracking or loading records, local call number collection name for discovery)
- ☐ Add information to populate items, holdings or other non-bibliographic r (e.g., Alma portfolios)
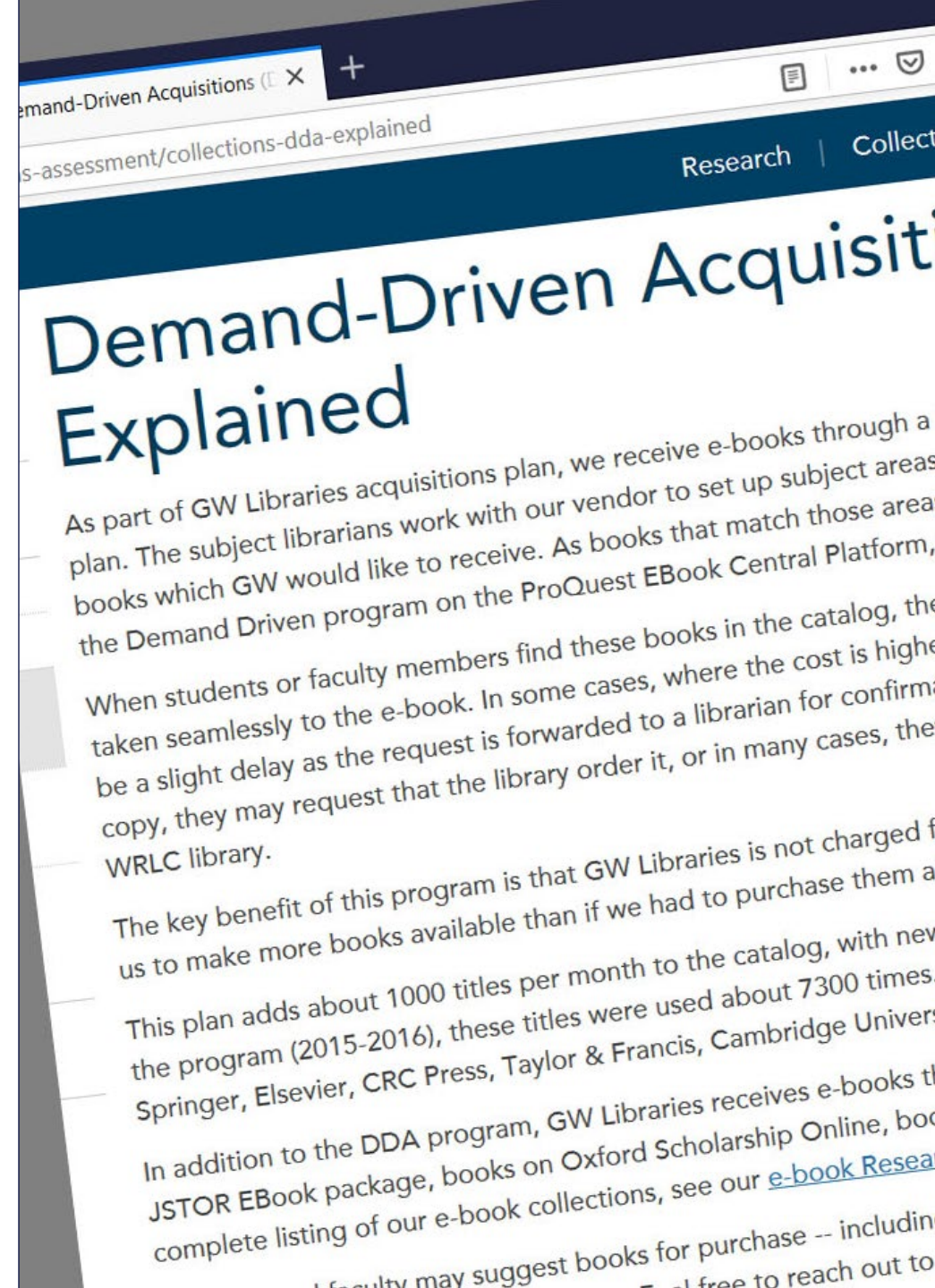- ☐ Other _____
- ☐ I don't know

MCCC Use Case

How can companies like Backstage help us to answer data quality-related questions posed by?

DDA collections in library catalogs

https://library.gwu.edu/collections-assessment/collections-dda-explained

MCCC Use Case

How can companies like Backstage help us to answer data quality-related questions posed by?

OCLC DDA management and access

https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/FAQ/How_are_DDA_collections_automatically_maintained

MCCC Use Case

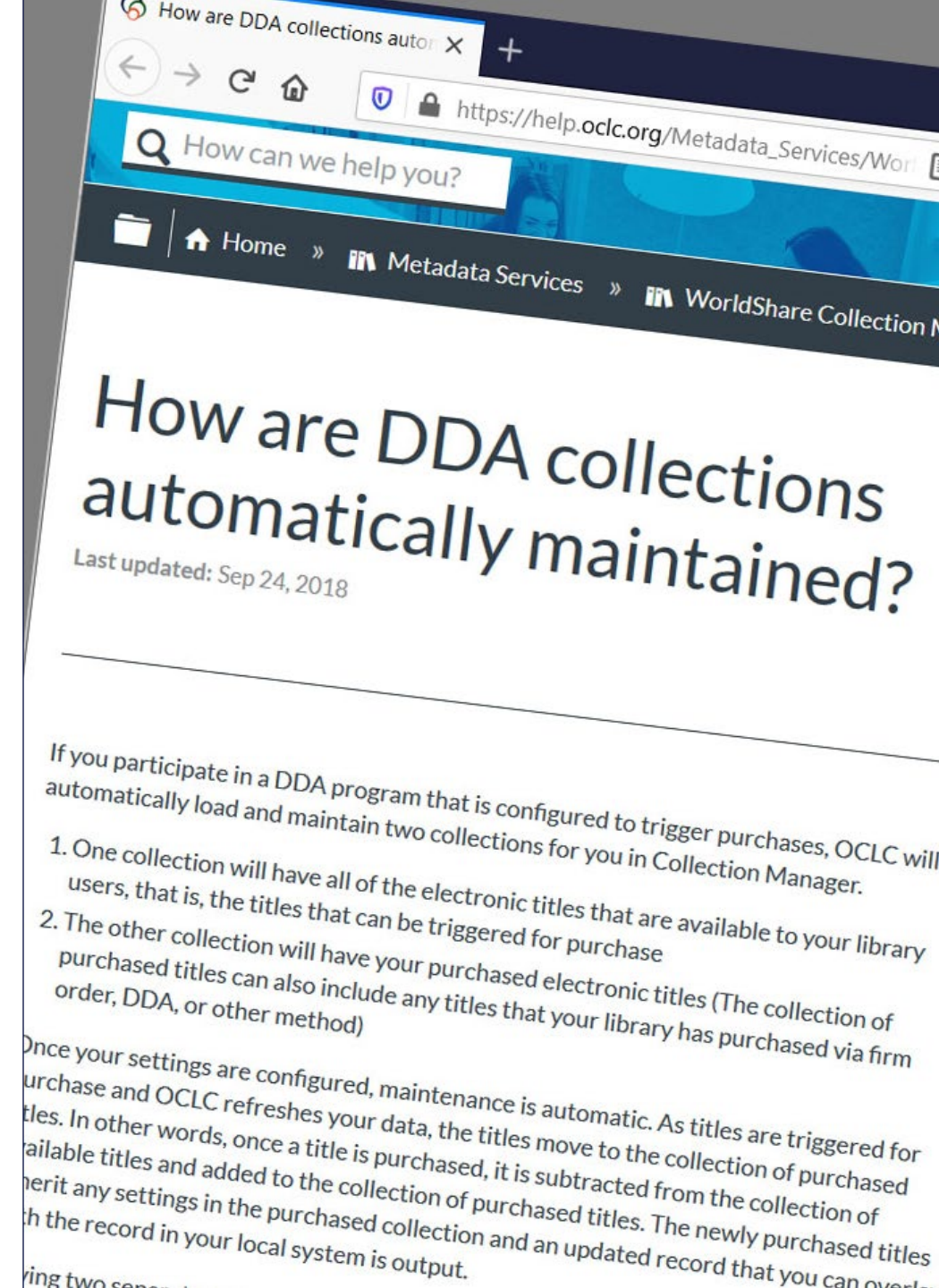How can companies like Backstage help us to answer data quality-related questions posed by?

OCLC product optimization during COVID-19

https://www.oclc.org/en/covid-19.html
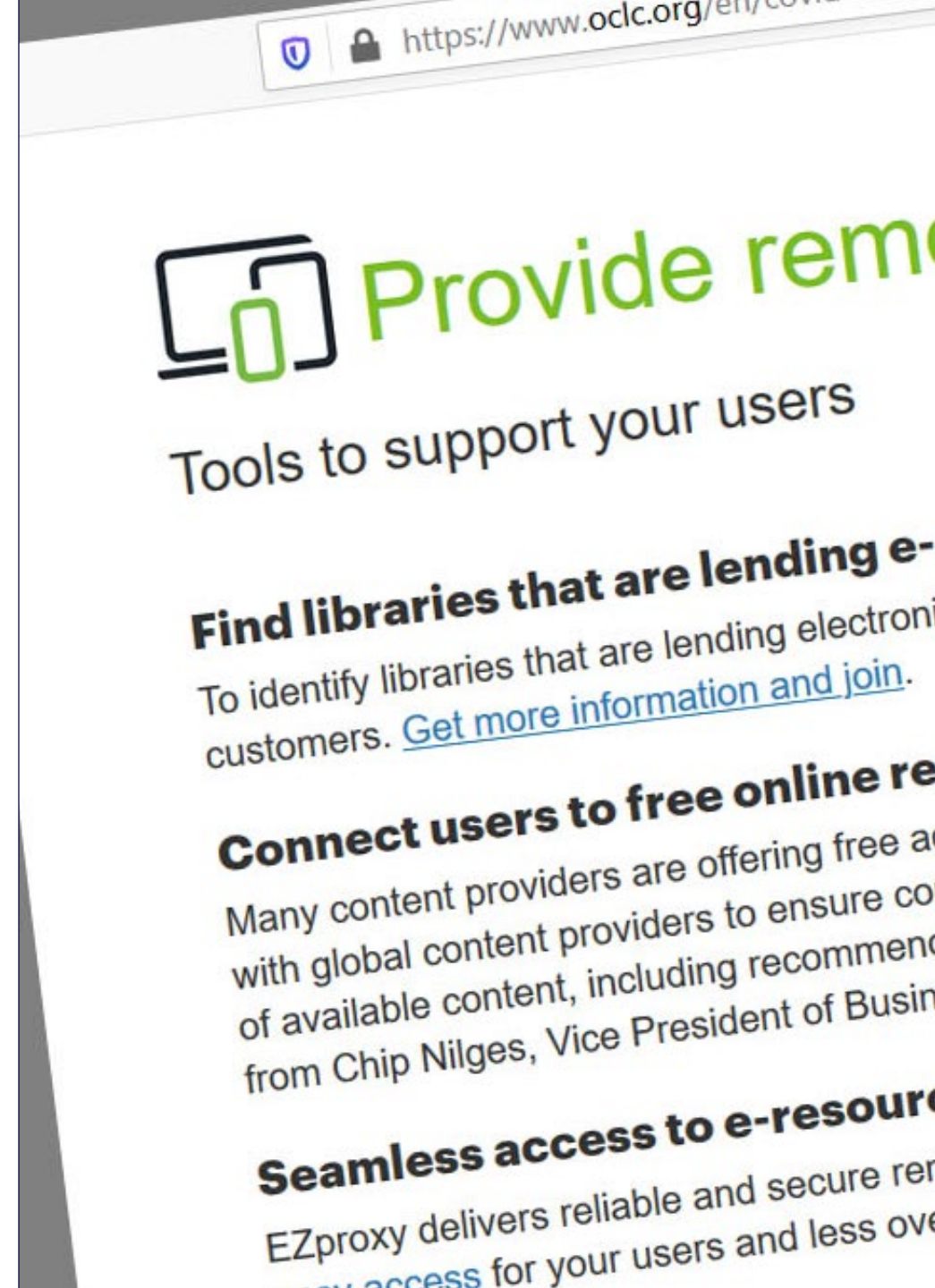
Optimizing Your Catalog

Assessment

Ask yourself these questions:

1. Can users clearly find how to access print and digital content (especially streaming video)?

2. Are holdings information/links to related content current and easily maintained?

3. Are you confident that content access is compliant with system delivery and performance?

Cleanup

Backstage works with existing metadata and content to understand where data discrepancies exist.

Cleanup Examples

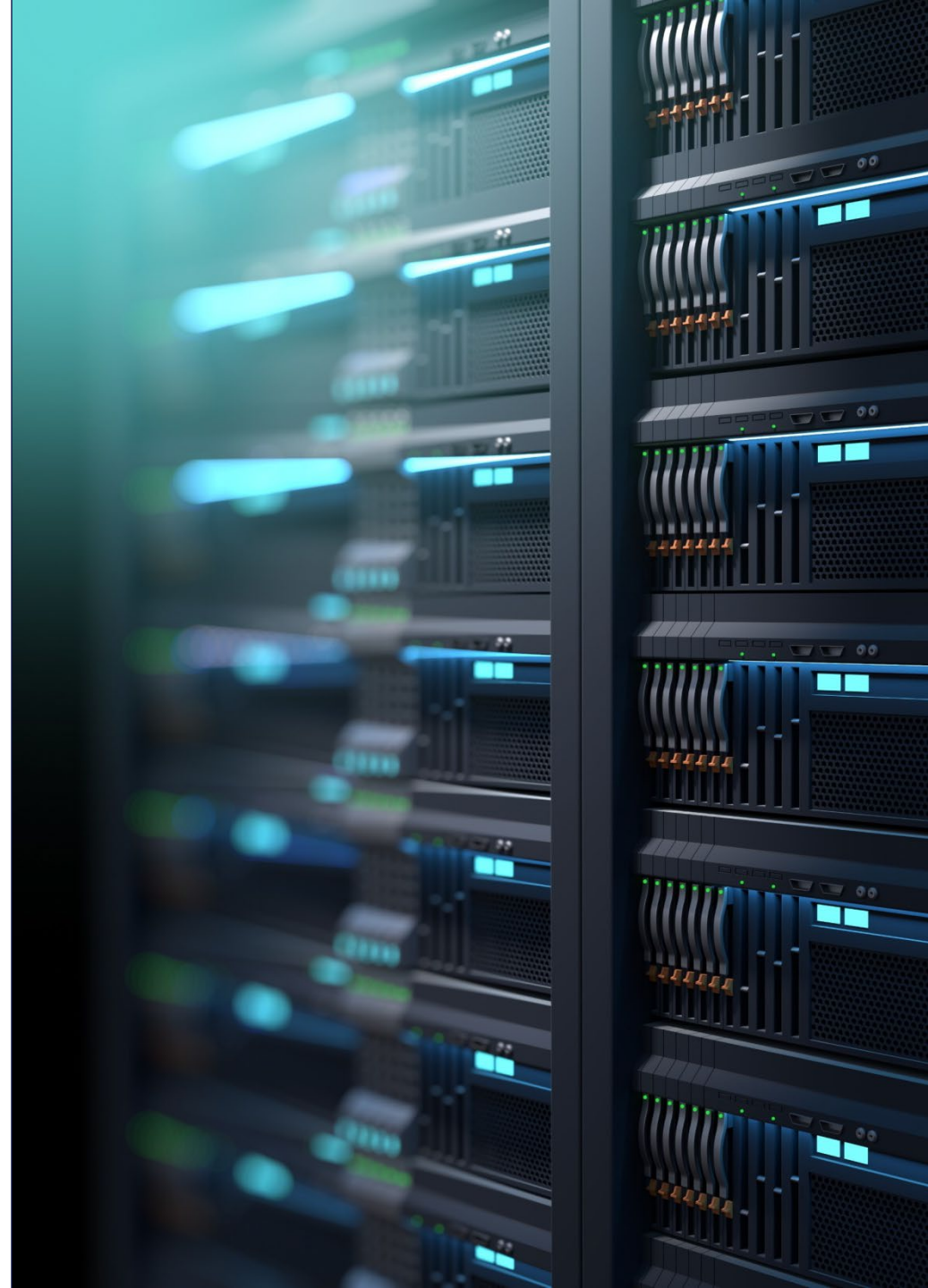|			
	830	0	$aEast Anglian archaeology :$breport ;$vno.104.
	245	10	$aDem Kirchenvolk die Leviten gelesen [...] :$bAlltag im Spiegel süddeutscher Barockpredigten /$cElfriede Moser-Rath.
	600	10	$aMoxham, Roy$xJourneys$zIndia.
	651	0	$aZaire$xReligion.
Old	650	0	$aBluebeard (Legendary character)
New	600	0	$aBluebeard$c(Legendary character)
Old	830	0	$aEdizione critica dell'epistolario verdiano
New	800	1	$aVerdi, Giuseppe,$d1813-1901.$tCorrespondence.
Old	130	0	$aBible.$pO.T.$pApocrypha.$pEcclesiasticus.$lEnglish.$f1912.
New	130	0	$aBible.$pEcclesiasticus.$lEnglish.$f1912.
	650	0	$aBaird, John Logie,$d1888-1945.
	650	0	$aCowboys - West (U.S.)

Updates & Enrichment

Backstage works with customers to map out the process for data modification/additions (including global changes and enhancements) with the goal of optimizing content access, performance, and accountability measurements.

KBART Update Examples

	A	B	C	D	E	F	G
1	publication_title	print_identifier	online_identifier	date_first	num_first	num_first	date_last	num
2	Trial handbook, Fall 2016	9781402427732	9781402427732				
3	Asset-based lending	9781402416408	9781402416408				
4	Insurance regulation answer book (2017 edition)	9781402426339	9781402426339				
5	Transfer pricing answer book (2016 edition)	9781402426162	9781402426162				
6	Trial handbook	9781402418075	9781402418075				
7	Derivatives deskbook	9781402421655	9781402421655				
8	Faber on mechanics of patent claim drafting	9781402424267	9781402424267				
9	Bankruptcy deskbook						
10	Initial public offerings						

	Q	R	S	T	U	V	W	X	Y	
1	publication_	date_mon	date_mon	monograp	monograph_edition	first_editor	parent_pu	preceding	access_typ	oclc_nur
2	monograph	2016							P	1030290
3	monograph	2011			Seventh edition				P	1030291
4	monograph	2016			2017 edition	Pruitt, John S			P	1030294
5	monograph	2016			2016 edition	Blair, David B			P	1030291
6	monograph	2012							P	1030292
7	monograph	2014			Second edition				P	1030291
8	monograph	2015			Seventh edition				P	9220471
9	monograph	2014			Fifth edition				P	1030291
10	monograph	2009							P	1030294

Enrichment Statistics

Section 2: Field Distribution

Control Fields (0XX)

Tag	Bibs with 0 fields	Bibs with 1 field	Bibs with 2+ fields	Total Fields	Avg Fields per Bib	Max Fields in one Bib	Changed Fields	Percent Changed
007	525	315	160	635	0.63	2	23	3.60%
008	8	992	0	992	0.99	1	148	14.90%
010	589	411	0	411	0.41	1	289	70.30%
020	441	276	283	965	0.96	12	22	2.30%
024	803	129	68	270	0.27	6	1	0.40%
037	772	221	7	236	0.24	3	7	3.00%
040	40	960	0	960	0.96	1	58	6.00%
041	819	181	0	181	0.18	1	45	24.90%
043	690	310	0	310	0.31	1	1	0.30%
072	992	4	4	15	0.01	5	1	6.70%

Descriptive Fields (2XX,3XX)

Tag	Bibs with 0 fields	Bibs with 1 field	Bibs with 2+ fields	Total Fields	Avg Fields per Bib	Max Fields in one Bib	Changed Fields	Percent Changed
240	939	61	0	61	0.06	1	18	29.50%
245	0	1,000	0	1,000	1	1	221	22.10%
250	754	246	0	246	0.25	1	94	38.20%
255	998	2	0	2	0	1	1	50.00%
264	7	573	420	1434	1.43	3	669	46.70%
300	10	990	0	990	0.99	1	548	55.40%
306	949	51	0	51	0.05	1	0	0.00%
336	1	957	42	1048	1.05	5	145	13.80%
337	1	981	18	1017	1.02	2	139	13.70%
338	1	983	16	1015	1.01	2	127	12.50%

Main and Added Entries (1XX,4XX,7XX,8XX)

Tag	Bibs with 0 fields	Bibs with 1 field	Bibs with 2+ fields	Total Fields	Avg Fields per Bib	Max Fields in one Bib	Changed Fields	Percent Changed
100	439	561	0	561	0.56	1	72	12.80%
110	966	34	0	34	0.03	1	1	2.90%
130	960	40	0	40	0.04	1	5	12.50%
490	782	200	18	236	0.24	2	135	57.20%
700	476	248	276	1,744	1.74	40	191	11.00%
710	652	280	68	490	0.49	18	30	6.10%
730	887	92	21	155	0.16	8	86	55.50%
740	978	8	14	76	0.08	15	3	3.90%
800	967	33	0	33	0.03	1	4	12.10%

Subject Access Fields (6XX)

Tag	Bibs with 0 fields	Bibs with 1 field	Bibs with 2+ fields	Total Fields	Avg Fields per Bib	Max Fields in one Bib	Changed Fields	Percent Changed
600	864	87	49	203	0.2	6	58	28.60%
610	966	28	6	41	0.04	3	5	12.20%
630	988	10	2	16	0.02	4	6	37.50%
650	136	192	672	2,966	2.97	16	249	8.40%
651	821	119	60	272	0.27	6	22	8.10%
655	831	77	92	446	0.45	17	91	20.40%
690	516	434	50	569	0.57	6	2	0.40%

The Role of a Vendor

During unusual/crisis times (COVID-19 is an example), the need to perform strategic planning (for when the situation ends) requires a vendor like Backstage that is:

- **Responsive**
  Timely, thoughtful replies to inquiries, samples, follow-up communications

- **Understanding**
  Willing to listen and offer recommendations

- **Proactive**
  Offers suggestions beyond the project scope that may be related/future

Questions & Answers

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Thank You.