

Merging library catalogs: The plan that worked for the Medical University of Ohio and the University of Toledo

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Merging library catalogs

- **TIMELINE**

- Library integration workgroup: 3/2006
- Library merger team: 7/2006
- III Implementation Team call: 12/2006
- Contract III began: 1/2007
- Deadline for Merger: March 1, 2007

Merging library catalogs

- **Library merger Team (sub group)**
 - **Director of Technical Services**
 - **Coordinator of Library Systems/
Systems Librarian**
 - **Head, Bibliographic Control
(Medical Library)**
 - **Coordinator of Access Services
(Medical Library)**

Merging library catalogs

- **Preliminary planning and preparing:**
 - **Getting started manual**
 - Data profiling: profile acceptance
 - **System Settings**
 - Fixed length codes
 - Branch codes

Merging library catalogs

- **Planning and preparing**

“Spreadsheets are your friends!”

“Chocolate is a food group!”

[ffcodesmerger.xls](#)

– Compare fixed field codes for each type of system record

– Add new Branch Codes

[locationcodepre.xls](#)

Merging library catalogs

- **Fixed Length Codes: Itypes**
 - **Mulford Library: 10 local codes**
Carlson Library: 75 local codes
 - **Completely revamped Carlson's itypes**
 - **Old codes | Transition codes |
Permanent Codes**

[itypestransition.xls](#)

- **Tied in with Loan Rule Determiner
Table/OhioLINK Requesting**

[Copy of LRDT1.xls](#)

Merging library catalogs

- **Fixed Length Codes: Ptypes**
 - Coordinated Mulford ptypes to follow Carlson ptypes (FT, PT, etc.)
 - [PTYPESALL.xls](#)
 - Loan Rule Determiner Table
 - OhioLINK mapping
 - Use pcode2, pcode3 to further define

Merging library catalogs

- **Updating the main database**
 - **Bibliographic records (39,000)**
 - **Item records (165,000)**
 - **Linked (100 +)**
 - **Bib record with more than 999 items attached (1)**
 - **Patron records (3,000)**
 - **Authority Records (60,000)**
 - **NLM**
 - **LC**

Merging library catalogs

- **Updating the Main Database**
 - **Check-in records**
 - **Attach MUO holdings**
 - Print (5800+) already in UTOL
 - **Input brief bibs**
 - Print & E(3,000+) not in UTOL
 - **Order records**
 - **Printed MUO records filed in notebook**
 - **Created New records for Serials and Monographs as paid for in new FY**

Merging library catalogs

- **III Issues**
 - **Call number output (bib or item)**
 - **Shared or separate bibs**
 - **Record priority overlay**
 - **Overlay of brief serial bibs**

Merging Library Catalogs

- **Re-organization**
 - **University Libraries [October 2006]**
 - **Technical Services [January 2007]**
 - **Coordinators: [January 2007]**
 - **Coordinator of Cataloging Services**
 - **Coordinator of Library Systems**
 - **Coordinator of Collection Development**
 - **Coordinator of Serials/Electronic Resources**

Merging Library Catalogs

- **Ongoing**
 - **Staffing/Workflow**
 - **Character-based → Millennium**
 - **Distance (from collection, systems support)**
 - **Merging of electronic resources**
 - **Web Access Management vs EZproxy**
 - **Troubleshooting connection issues**

Merging Library Catalogs

- **Ongoing**
 - **Acquisitions procedure**
 - **New fund codes**
 - **Separate budgets**
 - **Circulation Loan periods**
 - **Patron Loads**
 - **Interlibrary loan module**
 - **ILL Request Forms**
 - **olinks**

Merging Library Catalogs

- **Conclusions**

- Pre-plan
- Develop your team
- Other ILL products
 - (Scoping, unlimited web opac licenses)
- Load table training
- Communication with everyone!
- Keep a paper trail (old→new codes)

Merging Library Catalogs

- Questions??

- Thank you

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