



The UNIVERSITY *of* CALIFORNIA LIBRARIES

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Bibliographic Services Task Force: Executive Summary

Rethinking How We Provide Bibliographic Services for the University of California

Executive Summary

Society is in the midst of learning how to “be” in the information age. The advent of computers and the inclusion of the Web in our work and private lives have pushed innovations and embraced information and access in ways we can hardly imagine. We are living in a complex and challenging digital landscape that changes constantly.

On the Library front, our bibliographic systems have not kept pace with this changing environment. The continuing proliferation of formats, tools, services, and technologies has upended how we arrange, retrieve, and present our holdings. Our users expect simplicity and immediate reward and [Amazon](#), [Google](#), and [iTunes](#) are the standards against which we are judged. Our current systems pale beside them.

The current Library catalog is poorly designed for the tasks of finding, discovering, and selecting the growing set of resources available in our libraries. It is best at locating and obtaining a known item. For librarians and for our users, the catalog is only one option for accessing our collections. We offer a fragmented set of systems to search for published information (catalogs, A&I databases, full text journal sites, institutional repositories, etc) each with very different tools for identifying and obtaining materials. For the user, these distinctions are arbitrary.

Within Library workflows and systems too much effort is going into maintaining and integrating a fragmented infrastructure. We need to look seriously at opportunities to centralize and/or better coordinate services and data, while maintaining appropriate local control, as a way of reducing effort and complexity and of redirecting resources to focus on improving the user experience.

Books are not going away. Traditional information formats are, however, being used in combination with a multitude of new and evolving formats. It is our responsibility to assist our users in finding what they need without demanding that they acquire specialized knowledge or select among an array of “silo” systems whose distinctions seem arbitrary.

The famous sage Howard Cosell once said, “What’s popular isn’t always right. What’s right isn’t always popular.” We suspect when it comes to the Internet and how it has simplified searching, what is popular is also right.

Below are listed the Bibliographic Services Task Force’s core recommendations for actions we must undertake if we are to remain viable in the information marketplace.

I. Enhancing Search and Retrieval

I.1 **Provide users with direct access to item**

I.1a: Have UC eLinks take you to a logical, default choice, with option to go back to the menu if you want a different option. (If there is a reliable full-text link that would be first

choice. (This assumes that in the majority of times, we could correctly anticipate what service the user would want.)

I.1b: Provide an “I-want-this” button that is present when the context warrants, with the goal of always offering a fulfillment option. No dead ends. Give the user an option to specify turnaround time; work behind the scenes to fulfill as well as we can.

I.2 Provide recommender features

I.2a: Provide both content and filter based recommender features, which mine information in the bibliographic records, holdings information, aggregated use data, and the like, to offer suggestions of other works of interest.

I.3 Support customization/personalization

I.3a: Allow user to define the set of resources/databases s/he wishes to search simultaneously, including a broader set of resources than those supported by current metasearch tools, such as Google restricted to .edu domains, museum and archive databases, and the like.

I.4 Offer alternative actions for failed or suspect searches

I.4a: Assess a user’s input for likely spelling errors and offer alternatives, particularly if a term has few or no hits. Extend the services offered by general English-language systems such as Google to reflect the greater complexity of scholarly inquiry, including multi-lingual spell-checking and sensitivity to abstruse scholarly terms.

I.4b: Always offer constructive suggestions when a search produces zero results. Suggestions should include a broad range of options, including alternative search terms, related terms, options based on recommender features (ex: nothing on this topic found, would you be interested in this related topic?), offering to expand the search to other catalogs and/or WorldCat, offering to search Amazon or the Web, and options to get librarian assistance.

I.5 Offer better navigation of large sets of search results

I.5a: Implement FRBR concepts to present related works hierarchically, pulling together all records related to a particular work (e.g., Moby Dick), diverse expressions of that work (e.g., translations into German, Japanese and other languages), different versions of the same basic text (e.g., the Modern Library Classics vs. Penguin editions), and particular items (a copy of Moby Dick on the shelf).

I.5b: Follow all of the linking fields in serial records to present all of the variant titles to users in a “family tree.”

I.5c: Implement faceted browsing based on sophisticated analysis of the contents of the records.

I.6 Deliver bibliographic services where the users are

I.6a: Enable library content and services to be integrated within campus virtual learning environments/course management systems (VLE/CMS), e.g., Sakai, WebCT, Blackboard, etc.

- I.6b: Enable library content and services to be embedded in institutional portals.
- I.6c: Expose our metadata to external search engines as thoughtfully as possible.
- I.6d: Make our digital and unique collections available first within the UC community, then facing outwards.
- I.7 Provide relevance ranking and leverage full-text**
 - I.7a: Provide relevance ranking based on a broad set of criteria, to arrange a set of retrieved records so that those most likely to be relevant to the request are shown at the top of the retrieved set.
 - I.7b: Use full text for discovery and relevance ranking when available.
- I.8 Provide better searching for non-Roman materials**
 - I.8a: Provide better searching for non-Roman materials, allowing searching in both Roman and in the vernacular, sorting results in language-appropriate ways, and displaying results in both Roman and vernacular forms.
- II. Rearchitecting the OPAC
 - II.1 Create a single catalog interface for all of UC**
 - II.1a: Create a single catalog interface for both local and system wide collections. Engage in a system wide planning process to identify the appropriate mechanism for implementing such a vision
 - II.2. Support searching across the entire bibliographic information space**
 - II.2a: Pre-harvest metadata for the entire bibliographic information space that represents UC library collections for ease of searching.
 - II.2b: Provide result sets arranged by format, grouped in terms of granularity and other facets, together with user options to rearrange the default order.
- III. Adopting New Cataloging Practices
 - III.1 Rearchitect cataloging workflow**
 - III.1a: View UC cataloging as a single enterprise, eliminating duplication and local variability in practice, agreeing on a single set of policies, sharing expertise, and maximizing efficiency. Engage in a system wide planning process to identify the appropriate mechanism for implementing such a vision.
 - III.1b: Implement a single data store for UC, be it a single file of cataloging records or the entire ILS.
 - III.2. Select the appropriate metadata scheme.**
 - III.2a: Use level of description and schema (DC, LOM, VRA Core, etc.) appropriate to the bibliographic resource. Don't apply MARC, AACR2, and LCSH to everything.

III.2b: Consider the value of implementing the FAST syntax with special attention to ‘place’ and ‘time periods’ in order to support faceted browsing in those categories.

III.2c: Consider using controlled vocabularies only for name, uniform title, date, and place, and abandoning the use of controlled vocabularies [LCSH, MESH, etc] for topical subjects in bibliographic records. Consider whether automated enriched metadata such as TOC, indexes can become surrogates for subject headings and classification for retrieval.

III.2d: In allocating resources to descriptive and subject metadata creation, consider giving preference to those items that are completely undiscoverable without it, such as images, music, numeric databases, etc. Consider whether automated metadata creation techniques can be used for all textual materials.

III.3 Manually enrich metadata in important areas

III.3a: Enhance name, main title, series titles, and uniform titles for prolific authors in music, literature, and special collections.

III.3b: Implement structured serials holdings format.

III.4 Automate Metadata Creation

III.4a: Encourage the creation of metadata by vendors, and its ingestion into our catalog as early as possible in the process.

III.4b: Import enhanced metadata whenever, wherever it is available from vendors and other sources.

III.4c: Automate the addition of geographic data into our catalog to support existing services, and to support emerging services.

III.4d: Change the processing workflow from “Acquire-Catalog-Put on Shelf” to “Acquire-Put on Shelf with existing metadata-Begin ongoing metadata enhancement process through iterative automated query of metadata sources.”

III.4e: Add enriched content such as Tables of Contents, cover art, publisher promotional blurbs, content excerpts (print, audio or video), and bibliographies. Build retrieval, relevance, and navigation services on top of this content.

IV: Supporting Continuous Improvement

IVa: Institutionalize an ongoing process of identifying and prioritizing improvements to our bibliographic services, in such a way that we get more than incremental improvements. Must lead to action, not just study. One task might be to track environmental scans, for example.

IVb: Provide robust reporting capability (data warehouse).