ELUNA 2006 – June 6, 2006
Notes from presentation

Implementing Summary Holdings Statements at the University of Iowa [Aleph Breakout Session]
301-A *Wendy Robertson, (University of Iowa Libraries), Sue Julich, (University of Iowa Libraries); Jennifer Jenness (Northern State University), Moderator* This session will discuss implementation of Automated Summary Holdings Statements at the University of Iowa Libraries. At Iowa, we needed to consider and adjust to varying prediction pattern practices between library units, data conversion decisions and requirements. Planning, configuration, testing, obstacles, successes and ongoing workflow will be covered.

Wendy Robertson – systems librarian, U Iowa
Sue Julich – systems librarian, U Iowa

Patty Hatch contributed information that contributed to setup success

I.   Objectives at reduce manual Iowa (Wendy)
   a. Reduce manual maintenance / adding
   b. Consistency
   c. Match the other library holdings
   d. Create brief public displays
   e. Import HOL data into SFX
   f. Use for old titles and current titles
II.   Overview of process (Wendy)
   a. How does it work –testing and EL and Harvard documentation
   b. Problems could be data, table or functional
   c. Aleph followed MARC standard --what a surprise
   d. Doing the easy stuff first and holding off on the more challenging records—one dedicated staff person
III.   Local data problems and historical decisions (Wendy)
   a. Holdings
        i.   866/867/868^0 $8 0 $a
        ii. Some holdings have many lines
        iii. Hadn't fully implemented ANSI/NISO z39.71-1999
        iv. Had been waiting since contract obligation was signed in Aleph contract
        v.   Some holdings are split in locations in the same runs
   b. Captions
        i.   Captions moved to holdings wih v.17
        ii. Only one caption per title
        iii. Captions made to work with workarounds (needed cleanup)
        iv. Items not linked to a caption
   c. Data was fudged to ensure sorting as desired
   d. Enum / chron conversion – Iowa retained NOTIS sort order by converting as a ten digit number
        i.   Bad for recall
        ii. Bad for dual linkage
        iii. Didn't work for multiple copies – volumes didn't line up correctly
IV.   Global Changes (Sue)

       a. Remove 00000 copy numbers from LAW records – NOTE: Iowa global changes are done by a local perl scripting
       b. Linking item and HOL records
       c. Fix enum / chron where date was first level of enum
       d. Fix funky enum_a for items onverted from NOTIS—Iowa local problem
            i. Parsing the description field to get information for the appropriate data in the enum / chron fields
       e. See handout for the commands to do the global changes
       f. If there were multiple pair combinations, manual cleanup was needed and a report was generated for review

V. Tables setup (see handout for details)
       a. First tells the system to update the language code in HOL to match what is in BIB (xxx/tab/tab_fix)
       b. Creates summary holdings field: xxx60/pc-ta

VI. Nightly Fix

VII. Staff workflow and problems

[NOTE: Called out of session early]