

Bibliographic Utility Vision Document

Overview

The Bib Utility is a community driven open source bibliographic record database platform. The goals of the utility are to provide an approach to contain costs, facilitate community work contributions, and enhance system interoperability and reduce data exchange restrictions to create a robust bibliographic record resource.

Model

The system is both a central repository for bibliographic records that all participating users can copy from and will harvest records from other open sources such as national libraries or other consortial systems. It automatically finds duplicate records and provides a master record for users to copy or reference. The Bib Utility will serve as a model employing consistent standards and focusing on interoperability. The system will support both centralized and decentralized cataloging models.

We recognize that e-resources will need to be considered as we develop this model. Further discussion with ReShare and other groups will determine whether or how to include e-resources in this Bib Utility.

User Stories

As a cataloger...

Database Maintenance

- As a cataloger, I want a source of bibliographic records that I can link to.
 - When linking to bibliographic records I want to be able to:
 - Attach local holdings to central record
 - Add local bibliographic fields (LHR), if desired
- As a cataloger, I want to have the ability to temporarily "lock" records from editing by other users when I am editing that record in order to prevent duplication of effort. I also want record locks to expire after an agreed upon time limit so that no one record can be locked indefinitely.
- As a cataloger, I want to have access to a save file that will hold records that I am editing and creating. Ideally, there would be a personal or local save file for individual

catalogers and an online save file where records could be seen and shared among catalogers at individual institutions.

- As a cataloger, I want to have a way to create constant data workforms and share them for use among multiple catalogers.
- As a cataloger, I want duplicate records within the database to be de-duplicated, either by an automated process or by catalogers that have been trained to identify and merge duplicate records, or a combination of both.
- As a cataloger, I want to have the capability to insert clickable links for controlled access points within bibliographic records that will allow me to quickly see the authority record associated with the access point without having to do a search. (See [Entity Management doc](#))
- As a cataloger, I want to be able to easily add and delete/remove my institution's holdings from bibliographic records in the database.
- As a Cataloger I would want links to resources like HathiTrust and Google Books to be part of the completed record.
- As a Cataloger I would want to make sure that original work or unique items were not merged or overridden with another record.
- As a Cataloger I would want to ensure that local notes were retained in the institution's record.
- As a Cataloger I would want the catalog to accept different cataloging schemas (AACR1, Dublin Core, AACR2, RDA, BIBFRAME, etc.)
- As a Cataloger I would want to make sure that all languages (including Cyrillic text) would be accepted and displayed.

Database Use

- As a copy cataloger, I want a clean source of bibliographic records that I can copy.
- As a cataloger, I want to be able to search for a bibliographic record across multiple (or all) libraries or sources quickly, identify the preferred record easily, and use or modify that record for my own purposes.
- As a cataloger, I want to be able to see which libraries are the source of the record, so that I can sort by or limit to certain sources.
- As a cataloger, I want to be able to download sets of bibliographic records to load through Data Import.
- As a cataloger, I want to be able to download individual records directly into Inventory.
- As a cataloger, I want to be able to have a reference ID for each unique record.
- As a cataloger, I want to be able to quickly sort a list of search results by date, title, creator, publisher, and language of cataloging. I also want to be able to quickly identify which records in a list of results are of a higher level of completeness or authentication.
- As a cataloger, I want to be able to easily see how many other institutions have holdings attached to a bibliographic record.

Policy/Documentation/Permissions

- As a cataloger, I want individual catalogers to have varying levels of permissions to edit master records based on the level of training they have completed.
- As a cataloger, I want to be able to choose whether to make certain locally-cataloged or proprietary records available to other libraries using the service.
- As a cataloger, I want to have online access to documentation detailing the agreed upon structure, coding, and input standards for bibliographic records in the database.

As a manager of consortial services...

- As a manager of consortial services, I want to know that the bibliographic records available to my libraries to copy are open or otherwise legally free to modify and reuse
- As a manager of consortial services, I want the ability to enable catalogers to work across multiple institutions
- As a manager of consortial services, I want the ability to query records across the consortium for reporting or collaborative projects
- I want to have a tracking log of changes to each record including login information and time and date of changes
- I want the ability to roll back changes made to records

As a library director / dean...

- As a library director, I want a source of bibliographic copy cataloging records that will be robust enough that we no longer need to subscribe to another third party to find rare or unique records. The service will be complete enough that it will make more economic sense to catalog ourselves rather than subscribe to another service.
- As a library director, I want to save the time of my staff in locating and enhancing records.
- As a library director, I want a complete database on which to build comprehensive resource sharing networks for both print and digital content
- As a library director, I want smooth end user experience with search results from multiple points of access

As an acquisitions technician...

- As an acquisitions technician, I want to be able to download record sets that correspond to a particular shipment from a vendor and will overlay the corresponding short bibliographic records that were created when the items were ordered

As a collection development librarian...

- As a collection development librarian, I want to be able to identify libraries in my consortium, network, or state that own a particular item (for cooperative development or "last copy policy" reasons)
- As a collection development librarian, I want to be able to add my institution or consortium shared print retention commitments

- As a collection development librarian, I want to be able to compare my holdings against other libraries' [Note: a separate tool for this may be better, but it would be good to design this new system to ensure this is easy to do]

As a resource sharing librarian...

- For a given title I want to be able to see which of my library consortium members has that title.
- For a given serial I want to know the gaps in issues for a run of serials
- I want to control the number of days to deliver a request
- I want to communicate with the borrower or lender within the system
- I want a way to record information regarding the requests (staff notes)
- I want to be able to transmit a digital copy of an article or book chapter
- I want to be able to lend via Controlled Digital Lending (CDL)
- I want to be able to declare a borrowed item lost or missing
- I want request forms to be printable

As an authorities librarian...

- I want to be notified of changes to authorities in my bibliographic records
- Have varying levels of access to change authority records

Authorities

The system will support authority records, and linking between authority records and matching data fields in bibliographic records. Matched fields in bibliographic records will be automatically updated by changes to authority records.

Consider [entities management vision document](#)