DRAFT: FRBR Challenges in a Consortium Environment

Gem Todo: Transcribe into Confluence
Consult with: Resource Management
Inform: Eres, Resource Sharing

Official Confluence version:
https://uc-sils.atlassian.net/wiki/spaces/DIS/pages/2116845569/FRBR+Challenges+in+a+Consortium+Environment

Background

Primo VE has complimentary features called FRBR and Dedup. FRBR affects search results by grouping records into "versions" based on shared bibliographic information like title and author. Each version can be viewed as a full record. With FRBR enabled, a Primo view's brief search results shows grouped records as a single result, with a notation that "Multiple versions" exist. For dedup, records that are marked as duplicates are displayed as a single record.

Prior to joining our consortium environment, several UC campuses were successfully using FRBR and felt it worked well.

In Phase 4, the Discovery Functional Group requested that the NZ and IZs suppress FRBR for art books, music and performing arts materials, and law for Go Live. However, only Audio and Scores were suppressed in the NZ due to complications with the information being viewable in the NZ. They also suggested that the future Discovery OST revisit the suppression rules.

The Discovery OST has been attempting to review FRBR behavior but the consortium aspects significantly complicates how FRBR works in IZ Primo VEs. Replicable testing is difficult because the fluctuation of other campuses' holdings prevent us from working with a known dataset.

Desired Behavior

In priority order:
1. Criteria for the FRBR preferred record also needs the option to prioritize the local record
2. Sort FRBR versions list/FRBR group - we need the option to prioritize the local record

3. Ability to boost by location to avoid showing special collections and similar records before loanable records.
4. IZs need the ability for their suppress record settings to be used for NZ records in their Primo VE. Specifically, we don't want these settings to have to be set at the NZ level for NZ records.
5. FRBR keys - more options to customize including options to separate groups based on resource type

Issues

Some of the issues we have discovered include:
- Ordering of brief search results becomes unpredictable when FRBR is turned on
  - For example, in initial testing at UCLA, when FRBR was turned on a search for Dune placed Frank Herbert's Dune book at the bottom of the first page of results. If FRBR was turned off, it was located at the top. However, when the same search was tested several weeks later, Dune appeared at the top even when FRBR was turned on.
- We need the ability to prioritize local records in FRBR results.
  - To provide the best user experience, local holdings need to appear before records that require ILL. FRBR seems to disregard any local holding prioritization.
  - FRBR group and the holdings info says not available even though when you open it up, there is an available record. This could be fixed if local records were prioritized. - UCD Example
- For suppress FRBR/Dedup to work on NZ records, the NZ must be able to see the relevant fields – i.e. some things may need to be suppressed but those fields aren't passed on to the NZ. For example, UCI could not identify any NZ shared fields that would specifically identify law materials.
- Non-consortium issue - Multiple print editions prefer special collection or reference rather than general collection. No option for setting by location though. - Not a consortium issue per se but it exacerbates in combination with the consortium issues.
- Results are worst when print and electronic are combined – ask for examples

Conclusions

As currently designed, FRBR does not work effectively in a consortium environment. As such, we cannot recommend any specific settings until the consortium deficiencies have been addressed.

References

[Understanding the Dedup and FRBR Processes (Primo VE)](#)

[Configuring the Order of Locations in Search Results](#) (Might be a solution to Special collections being preferred instead of main stacks?)

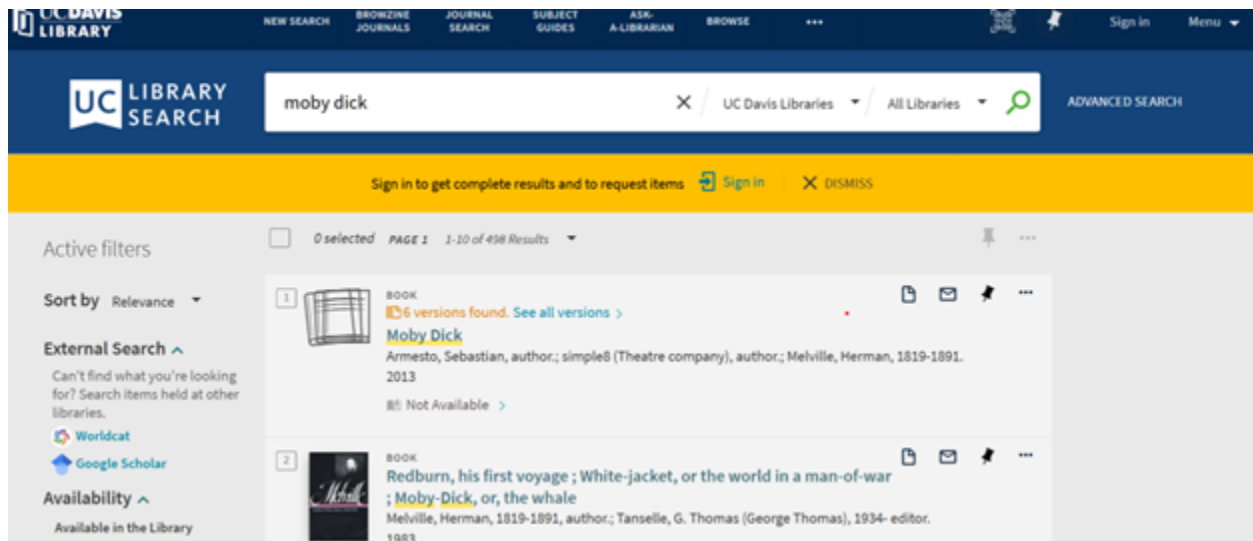[Functional Requirements for Bibliographic Records (FRBR)](#)

Related Idea Exchange

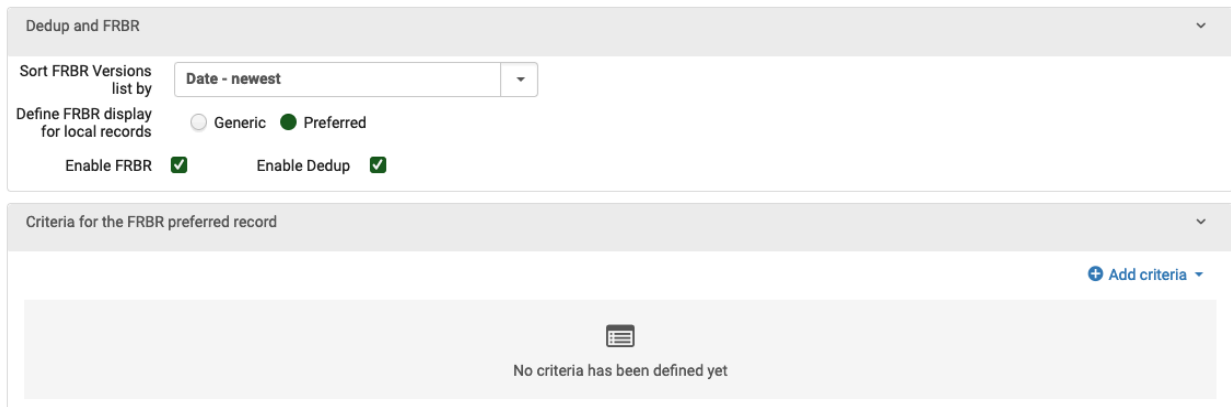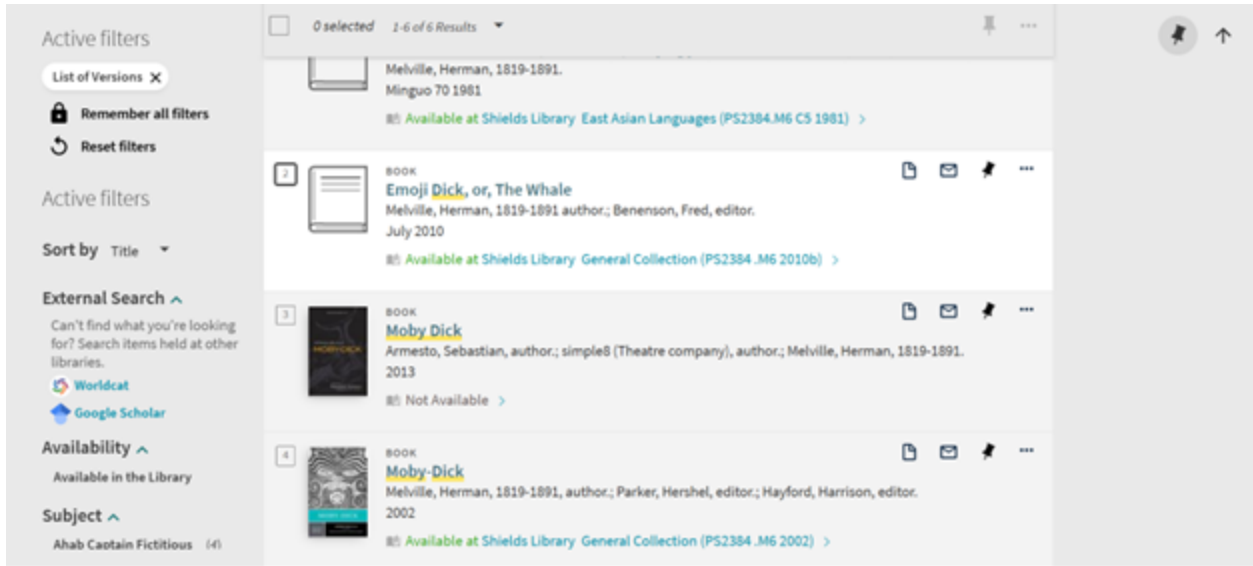[Allow boosting IZ records when displaying FRBR groups](#)

Screenshots

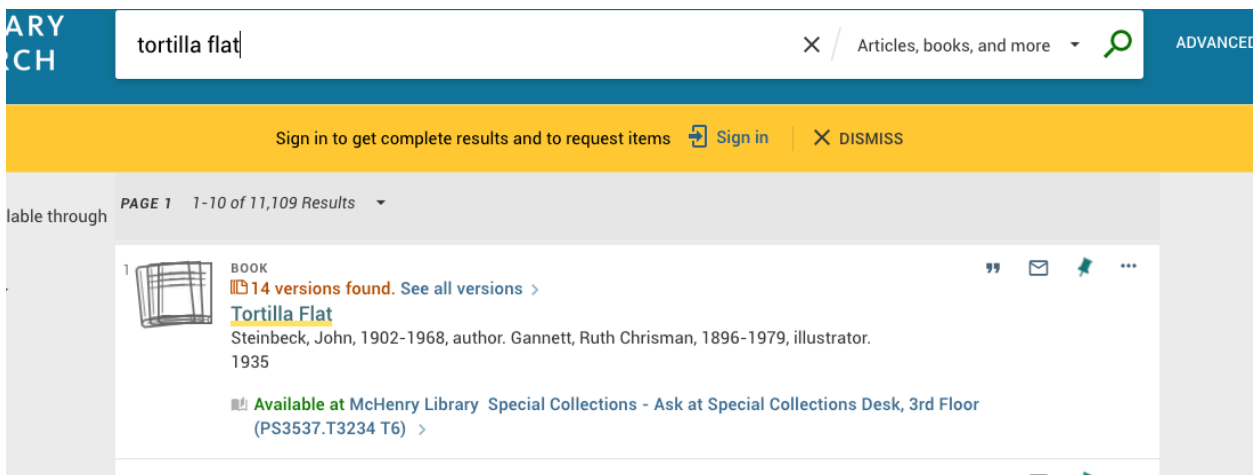## FRBR Showing Record is Unavailable

Here's the initial brief result display:

However, if you click, you can see UCD does have available copies at Shields Library:

Config screen for FRBR preferred record criteria and "Versions list" sorting

UCSC: Special Collections item displays as preferred record for Tortilla Flat

tortilla flat

✕ / Articles, books, and more ▾ 🔍 ADVANCE

ACK TO RESULTS LIST Showing list of versions

PAGE 1 *1-10 of 14 Results* ▾

1 BOOK
Tortilla flat
Steinbeck, John, 1902-1968, author. Fensch, Thomas, writer of introduction.
1997

📖 Check availability ›

2 BOOK
Tortilla flat
Steinbeck, John, 1902-1968.
1986, ©1935

📖 Available at McHenry Library General Collection, 4th Floor (PS3537.T3234 T6 1986b) ›

3 BOOK
Квартал Тортилья-Флэт ; Гроздья гнева ; Жемчужина. / Джон Стейнбек ;

UCSC: Tortilla flat FRBR group includes General Collection record