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Copac developments and the Copac Collection Management service

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Abstract

Purpose – This paper aims to describe major developments at Copac, including changes that facilitate use for interlibrary loan activity, introduce the Copac Collections Management project and look toward future developments in the context of the UK's National Monograph Strategy. The Copac service gives access to the merged catalogues of 95 UK and Irish national, academic and specialist libraries, and is still growing.
Design/methodology/approach – This paper is a descriptive account.
Findings – This paper identifies and describes some of the implications of the reengineering of Copac; addresses the role and benefits of the Copac Collections Management project; and looks ahead to forthcoming development areas.
Originality/value – This paper is a valuable update on the service provided by Copac, as well an overview of the forthcoming Copac Collections Management tools service, and an introduction to future developments within the National Monograph Strategy context.

Keywords Academic libraries, Collection development, Collaborative collection management, National monograph strategy, Union catalogues

Paper type General review

Introduction

Copac is a freely available union catalogue, providing access to the merged catalogues of an increasing number of national, academic and research libraries within the UK and Ireland[1]. Our contributors range from the British Library, through major academic libraries, to small specialist libraries such as the Royal Botanic Gardens, Kew. We standardize incoming data, deduplicate and provide an easy-to-use interface to make the merged catalogues available to researchers and library staff everywhere. We also make the data available for re-use by individuals and other services through a number of machine-to-machine interfaces.

Behind the calm exterior of the Copac catalogue service, there have been significant developments underway during the past couple of years, with more planned for the future. Two major reengineering projects have been completed, including changes that help support interlibrary loan activity. Alongside this, the continuing growth of the Copac database means we have been looking at ways to make the data we have work harder, collaborating with library colleagues to develop and test tools for supporting collection management and related activity, all underpinned by the deduplicated Copac data. In future, Copac will be working within the context of the UK's National Monograph Strategy (Showers, 2014), looking initially at increased database expansion and options for developing other new services.

Rebuilding Copac

July 2014 saw the culmination of a major project with the release of a new Copac interface and a completely new database, followed, in July 2015, by our move onto a cloud system, giving us a faster, more robust platform and completing the behind-the-scenes rebuilding of the service. Some of the results of this activity are more visible than others, but all has been working towards building a robust and flexible platform both to support future development and to widen the range of services we can offer based on the Copac data, beginning with the Copac Collection Management (CCM) project[2].

The updated Copac interface introduced a much cleaner appearance with flexible display options. A significant change is the ability to expand a record consolidation made up of duplicate records from multiple contributors, so that you can see the individual constituent records that make up each consolidated record. In the past, records for pre-1800 materials were excluded from the deduplication process because of contributor concerns about the uniqueness of these materials. The record expansion facility means we are now able to merge records for pre-1800 materials, removing duplication from the database, whilst at the same time ensuring researchers are able to see the specialist copy related information in context.

Feedback from interlibrary loan staff told us that increased deduplication was important (Jeskins and Cousins, 2011), whilst the work on the CCM project also made it clear that we needed increased levels of deduplication. So now that the initial work on the full deduplication of the database is

complete, we are looking at the Copac data with a focus on the detail of the record match process to improve the level of deduplication we are achieving for problem cases. Records for pre-1800 materials raise some particular deduplication issues; for example, records from different contributors can vary significantly in the way very long titles have been truncated, so we are assessing how we can bring these records together without also merging in records for similar, but unrelated materials.

We know that understanding the nature of a document held by a particular institution can be important for interlibrary loan requesting, in particular distinguishing electronic formats. So as part of the database redevelopment, we introduced a flag to indicate the document format for each record, including each record within a consolidation of merged duplicates from multiple contributors. The individual contributor records within a consolidation can also be viewed by document type, so checking for libraries with print holdings should now be easier. This visibility of the document format has also made it possible for us to look in more detail at how we are identifying format, particularly in records where this is not specified, and we will be using this to review and develop our format identification processes.

Other feedback has related to a desire for information about whether particular contributing libraries are willing to lend documents, as well as their British Library inter-library loan codes. In response to this, we updated our Library Information pages to include this content. Each contributing library has its own information page which can be accessed from the Copac Holdings information display screen for each record in a result set, or directly from our "About" menu[3].

Collection management tools: enhancements and access

The Copac enhancements outlined above provide a reliable high-quality data environment for the additional functionality provided by our collection management tools, as they move from prototype to fully-fledged Copac service. The origins of the tools as a community-driven initiative have been instrumental in their success, and enhancements to the user interface and access will deliver additional benefits to existing and new users.

The CCM Tools project was established with the aim of enabling rich Copac data to be used to support collection management activity: by building prototype collection analysis tools to enable evidence-based decision-making. It came about to meet the needs of practitioners who wanted to use Copac data to benchmark their collections against those of other Copac contributors.

Since it began back in 2011, the original prototype suite of tools, developed in collaboration with RLUK[4] and the White Rose Consortium[5], has been put to the test by a much larger group of RLUK member libraries. They have used it to support a range of use cases, and, in many cases, incorporated it into their day-to-day workflows. Through community-based collaboration, the project has developed to reflect the requirements of collection managers and has demonstrated real value in delivering functionality and savings in staff time not available elsewhere.

By enabling library collections to be analysed against the holdings of other institutions, the CCM Tools have supported policy and decision-making in the following areas:
- stock editing including discard and retention activity;
- demonstrating the value and impact of collections;
- identifying collection strengths;
- conservation and digitisation priorities;
- identifying gaps in collections and prioritising items for purchase; and
- dealing with gift collections.

The project team at Jisc have collected evidence of value and impact through surveys, interviews and focus groups, as well as case studies. Some comments from participants in focus groups about the value of CCM Tools include:
- "CCM is critical".
- "It's a very valuable thing so I'd do almost anything to help develop it".
- "It's wonderful, keep developing it, don't take it away".

When identifying the main benefits of the Tools survey respondents commented:
- "Providing a realistic starting point for challenging work".
- "Benchmarking against other libraries".
- "Speed and hard evidence".

Developments in the pipeline
Support from the community and evidence of value has driven the decision by Jisc to move CCM Tools into service. Over the past year, we have been working on improvements to the user interface based on feedback from a formal user-testing programme. Key developments include:
- incorporation of usability principles to make the Tools easier to use;
- retention of clean uncluttered look;
- creation of new data visualisations;
- improved prominence of visualisations in results;
- clarification of export options; and
- more in-context help.

We have also been investigating the value of the Tools to institutions who do not contribute their data to Copac, by working with a pilot group of collection managers. They have confirmed that many of the same benefits identified by original users are of real value to them and have identified use cases and projects which CCM Tools can support in their institutions.

Following on from this, and in response to additional requests, we will, therefore, be opening up access to the Tools to the wider academic community. This is a great development which will enable many more institutions to benefit from using the Tools to enhance their collection management activity. To ensure the system has the capacity to support this change, considerable preparatory work has been required. This involved creating both a separate secure hardware platform for CCM Tools and setting up a much simpler and sustainable access system for users via Shibboleth. We will be closely monitoring usage as part of this change and assessing the impact on the service.

We see the ongoing enhancement of CCM Tools as an iterative process, so developments will continue. There are still improvements to be implemented around storage and

management of saved searches (batch searches) and we will be keenly gathering feedback from the new broader user base to feed into ongoing work.

The decision to create a CCM Tools service will make it a key feature of the bibliographic offering from Jisc along with Copac. These services work in tandem and will continue to develop as part of Jisc's broader engagement with the National Monograph Strategy.

Copac and the National Monograph Strategy: future developments

The National Monograph Strategy aims to provide a practical framework for the collaborative development of a distributed national research collection for the UK. This has the potential to provide benefits right across the academic community. The future direction of the Copac service is currently under review, but the database itself forms an important element within the National Monograph Strategy, and this work has created an opportunity to look more widely at the role of Copac within the UK academic sector as a whole. Copac continues to grow with the addition of catalogues from a range of specialist libraries, for example, English Heritage, focusing on collections of particular value to the research community. However, in this context, the CCM work illustrates that, whilst the collection management tools can offer value to any library, there is greatest benefit to those whose collections are included within Copac. So as we move CCM into service and gradually increase the user base, we are also looking at how best to open up the range of academic contributors to Copac beyond the current RLUK libraries, reaching out initially to university libraries that wish to contribute their catalogue and have a commitment to maintaining their data contribution over the long-term.

Another major development arising from the National Monograph Strategy relates to the potential development of a Copac shared cataloguing service. A significant proportion of records on Copac are supplied by RLUK member libraries and, where possible, these records are also used to create the RLUK database for shared cataloguing. This database is currently available only to RLUK members and customers but has the potential to be a valuable resource across the wider community. There is preliminary work to do, technical and otherwise, but we are aiming to provide a trial service in the coming year to assess development requirements and potential demand for supporting a shared cataloguing service, initially for the UK academic community.

This National Monograph Strategy development activity offers benefits both to the individual library and the wider community. By broadening the scope of Copac and therefore the CCM Tools, as well as trialling the provision of a shared cataloguing service, we hope to start the journey towards developing the infrastructure to support a truly national view of our collections and of the community's efforts to preserve and manage them.

Notes

1 http://copac.jisc.ac.uk

2 http://ccm.copac.jisc.ac.uk

3 http://copac.jisc.ac.uk/about/libraries

4 www.rluk.ac.uk

5 www.whiterose.ac.uk

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