

CCM tools: Introductory Hands-on worksheet

Introduction & Accessing CCM

This worksheet gives you search examples you can work through to explore the main features of the CCM interface. Do not feel you have to follow the sheets exactly from start to finish; the scenarios are simplistic and the examples are simply there to help you explore the facilities. If you have questions please use the CCM forum to ask for advice (<http://ccm.copac.ac.uk/forum/>).

- ❖ To access the CCM tools interface go to: **<http://ccm.copac.ac.uk>**

Select the 'Sign in' option towards the top right of the screen. Login using your personal username and password.

Note: the beta CCM tools interface is basic and the focus is on functionality rather than design. If we are able to move forward into creating a production service we will revise the interface and any feedback you can provide will help to shape the new interface.

1. Working with small amounts of material using the Quick Number Search

Scenario

You are in the University of Manchester library and you are reviewing a section of your South Asian related materials at the shelves. During this process you identify some older items that are in poor physical condition. This is not a heavily used part of the collection and when you check your catalogue you find that none of the items has been in circulation for several years. So you need to decide whether these materials need to be conserved or whether they can be withdrawn.

Using the Quick Number Search screen

Because you are dealing with a small number of items you can use the **Quick Number Search** form. Carry out a search for the ISBNs of the relevant materials:

- ❖ Select the **Standard Numbers** text box and enter the ISBNs as a comma separated list:
9231013637, 0140207694, 0858831775, 0333255801, 0195803930, 0333240634
- ❖ Check that the **Number type** option is set to 'ISBN'.
- ❖ Under 'Personalise result display set the **Deduplicate** option to 'records with a shared ISBN'.
- ❖ Then select 'Search'.

You will be presented with a Copac style result set of brief record details.

Search results

In the result display screen you can browse multiple result pages, change the 'View' and use the 'Export' options. You can also view the full details of any document by selecting the highlighted document title.

- ❖ Select the **Visualisation of Search Results** button at the top of the screen.

Search result visualisation

You will now see the Visualisation screen. The main graph shows the number of documents held by each contributing library. From this you can see that quite a few libraries have 4 of the documents but Manchester appears to be the only library with all 6.

Below the graph are thumbnails for two more graphs and a map.

- ❖ Select the **small thumbnail graph with horizontal bars**; this shows you the number of contributors holding each of the documents in your list. You will only see this graph for small result sets.

You can see from this graph that several of the documents are widely held, so this might be useful supporting information when you are considering your own local criteria for withdrawal. However two documents are much less widely available.

- ❖ If you put your mouse pointer over the bar for ISBN **9231013637** a box will appear telling you that this is a map held by 4 libraries, of which Manchester is the only English library.

Cataloguing for a 1979 map could be rather variable, so you might want to follow this up with a further other searches to confirm the apparent rarity. But this would be information to include in your decision making.

- ❖ Now put your mouse pointer over the bar for ISBN **0858831775**. As before a box appears which shows that this appears to be a single volume of a periodical or multivolume work. Again, cataloguing for this type of material can vary, so a follow-up search for the title would be needed to decide exactly how rare this document might be.

Because of the nature of the map and the periodical/multi-volume records some follow-up is required, but the results may help to focus your time on the less clear-cut examples and provide evidence to support decisions about conservation needs of these materials.

2. Working with large data sets using the Batch Search form

To follow this batch search example you will need to download the test data file from:

- ❖ <http://ccm.copac.ac.uk/worksheet/Test-data-ISBNs-for-withdrawal-0713.txt>

The example assumes the test file is on your desktop, if you store it elsewhere on your machine you will need to amend the example accordingly.

Alternatively you can create your own sample file of ISBNs to work with.

Scenario:

You need to make space in part of your store, so you are undertaking a major stock withdrawal programme. You've used your LMS to generate a list of potential items for withdrawal using your local criteria. This has been edited to produce a comma separated file of ISBNs.

Using the Batch Search screen

You need to carry out a search for the set of ISBNs you've identified as candidates for withdrawal:

- ❖ Select the **Upload filename** text box and from the Desktop select the file named 'Test-data-ISBNs-for-withdrawal-0713.txt'
- ❖ Check that the **Number type** option is set to 'ISBN'.
- ❖ Under 'Personalise result display set the **Deduplicate** option to 'records with a shared ISBN'.
- ❖ Then select '**Search**'.

When you run a batch search you are taken to the **Batch search summary screen** giving you details about the search you have just submitted. In future, if you set up an RSS feed this will send an alert when the search is complete, but for today

- ❖ Select the **Batch search history** button to see your list of searches and check whether the search is yet complete.

All previous searches carried out by colleagues at your institution will be listed on the batch search history, so you can review previous result sets. The search shouldn't take too long to run, if it is not complete when you first look just reload the page in a couple of minutes – once the result appears:

- ❖ Select the **highlighted result set name** to see the search results.

You will be presented with a Copac style result set of brief record details.

Search results

In the result display screen you can browse multiple result pages, change the 'View' and use the 'Export' options. You can also view the full details of any document by selecting the highlighted document title.

On the top right of the screen there is an option to change your view of the result set in terms of the number of libraries holding each document. As you are primarily interested in withdrawing material

you want to know which items are held by large numbers of institutions and can thus safely be withdrawn.

- ❖ Select '**Records with 6 or more holding libraries**' then select **Change display**. The result display is updated to show only those records with 6 or more holding libraries; the change in result set size is clear from the number of records shown towards the top of the screen.
- ❖ Now select the '**Visualisation of Search Results**' button at the top of the screen.

Search result visualisation

You will now see the Visualisation screen. The main graph shows the number of documents held by each contributing library. Below this are thumbnails for a second graph and a map.

- ❖ Select the **small thumbnail graph**, this shows you the number of collections in which each of the documents in your list is held.

You can see that quite a number the materials are held by 6-8 libraries and you are unsure about this range so decide to be more cautious and change your view of the results again:

- ❖ Use the **Change visualisation** option at the top right of the screen to view records held by 9 or more libraries.

You feel this is a better cut-off for the time being, but you want to make sure that you're not discarding too many last copies within your region.

- ❖ Select the **small thumbnail map**, this shows you the national distribution of collections in which each of the documents in your list is held.

You can focus in to look at your region in more detail. You can also look at the documents held by individual institutions. If you select a map point this gives you the name of the institution and the number of records. If you select this you will see a list of all the items held by that institution. You can see that many of the libraries hold quite large subsets of the records and they are distributed across the country so should be relatively accessible to your users should they be needed.

Once you are happy with your final selection you can export the data relating to your result set. You can export the data in a range of forms shown towards the top of the screen:

- ❖ Check that '**Graph data**' is selected then select the **Export** button.

This provides you with a data file that you can open as a spreadsheet. You can now adapt this data as required to create your own graphs etc. using your spreadsheet facilities. The data export includes the ISBN from the records. This can be used, eg. to import the data into your LMS to generate lists with key bibliographical data e.g. Bib id, author, title, volume, publication date, class mark, barcode etc., to aid withdrawal of items from your collection.

3. Using the Keyword search form

The keyword search allows you to be more exploratory, for example, looking for collections by a particular author.

Scenario:

At Manchester the Music department is developing a greater interest in early music, so you are currently reviewing your collections in this area and in particular looking at materials for lute.

- ❖ In the **Subject** field enter **Lute songs**
- ❖ Then select '**Search**'.

Search results

In the result display screen you can browse multiple result pages, change the 'View' and use the 'Export' options. You can also view the full details of any document by selecting the highlighted document title.

- ❖ Now select the '**Visualisation of Search Results**' button at the top of the screen.

Search result visualisation

You will now see the Visualisation screen.

- ❖ Look at the graph showing the '**No. of collections in which each document is held**'.

Because there are a lot of columns there isn't room on the x axis to label them all. However, if you **move your mouse slowly over the columns** a box will appear to tell you, for example, that Manchester has over 100 records with this subject.

Below this are thumbnails for a second graph and a map.

- ❖ Select the **small thumbnail graph**, this shows you the number of collections in which each of the documents in your result set is held.

Your own library will always be listed first showing how many records represent materials only held by your institution, for Manchester this is just over 60, suggesting there are already some interesting materials for that subject.

To get a different view go back to the search form and repeat the search, this time

- ❖ Add to your search a **Limit** to materials held by **Manchester University**

This time the graphs emphasise the number of apparently unique items held by Manchester. Needless to say a subject search depends greatly on the record quality and use of consistent subject headings, but it might still be suggestive and identify areas worthy of further exploration.

4. Experimenting with the Deduplication options

There are 4 levels of deduplication:

- ❖ Records with a shared ISBN
- ❖ Level 1: uses Date, Title, Pagination, Edition, Author, Publisher
- ❖ Level 2: uses Date, Title, Author, Publisher
- ❖ Level 3: uses Title, Author

The ISBN deduplication merges records sharing the same ISBN. Errors and variations in the records can mean this results in some misconsolidations. It is likely to be uncommon, though we have no figures for this, but perhaps not as uncommon as you might think.

There are also three levels of multi-field deduplication offering increasingly broad matching of records. The likelihood of records matching incorrectly will increase with each level; but cataloguing variations also mean the more stringent matches will retain greater numbers of duplicate records.

- ❖ Using the Keyword search form do a **Title** search for **Twelfth night**
- ❖ Note the number of records
- ❖ Then go back to the **Keyword search** form and repeat the same search with each of the other deduplication options.

The deduplication slows the search down noticeably. It works OK for this c.1800 records, but if you are expecting a larger result set you should select the option to treat it as a batch search.

Depending on your search the various deduplication methods may have little impact on the results or a very significant impact. The search for twelfth night illustrates a modest change in results with each deduplication methods, but it may not always work so neatly.

You might like to consider the pros and cons of the various deduplication options and situations in which they might be useful. For example, perhaps the broad-brush 'Title and author' match would be fine for getting a general sense of how two collections compare, without getting side-tracked by differences in edition or multivolume works.

We would be very interested in hearing about your use of the deduplication options as you trial the CCM tools – please share your thoughts about what works (and what doesn't) on the CCM forum.

Note: Your User ID

Your User ID gives you access to a shared workspace on the CCM interface, so if you look at the batch search history you will see any searches previously carried out by colleagues at your institution allowing you to work collaboratively.

However, your User ID will identify you *individually* within the CCM Forum so you can make a personal contribution to the questions and discussion within the forum.

When you sign in with your User ID the CCM interface will recognize which institution you are from. This means that when you do a search for your local record number it should correctly identify your records on the Copac database. However, you may need to clarify exactly which number on your system represents the stable 'local record number' that is used to identify your records on Copac.