

Orbis Cascade Alliance
The YBP EOCR Record Loads in Alma Group
Progress Report (1-26-2016)

The YBP EOCR Record Loads in Alma Group (YBP EOCR) began work on our charges in October of 2015 with a report date of December 2015.

We identified 3 major problems or challenges with loading YBP EOCR records into Alma.

1. Matching print records to electronic records (or vice versa)
2. Multi-matches
3. Duplicates

We identified possible improvements in the process, in the YBP system and in the Alma system that might lessen problems.

Priority

1. Not matching on the 020z fields
2. Using EOCR+ or YBP API
3. Merging duplicate records in the NZ

Lesser

1. Hierarchical matching
2. 2 match points
3. Same inventory types
4. Adding YBP ID number to NZ records

In our last report the YBP EOCR group requested to continue our investigations. Our new goals for reporting by the end of March 2016 would be:

- Investigate YBP EOCR+
- Investigate YBP API
- Update documentation and provide training

Depending on how these go, we might request another extension to explore:

- Hierarchical matching
- Using 2 match points
- Using same inventory type
- Adding the YBP ID number to NZ records