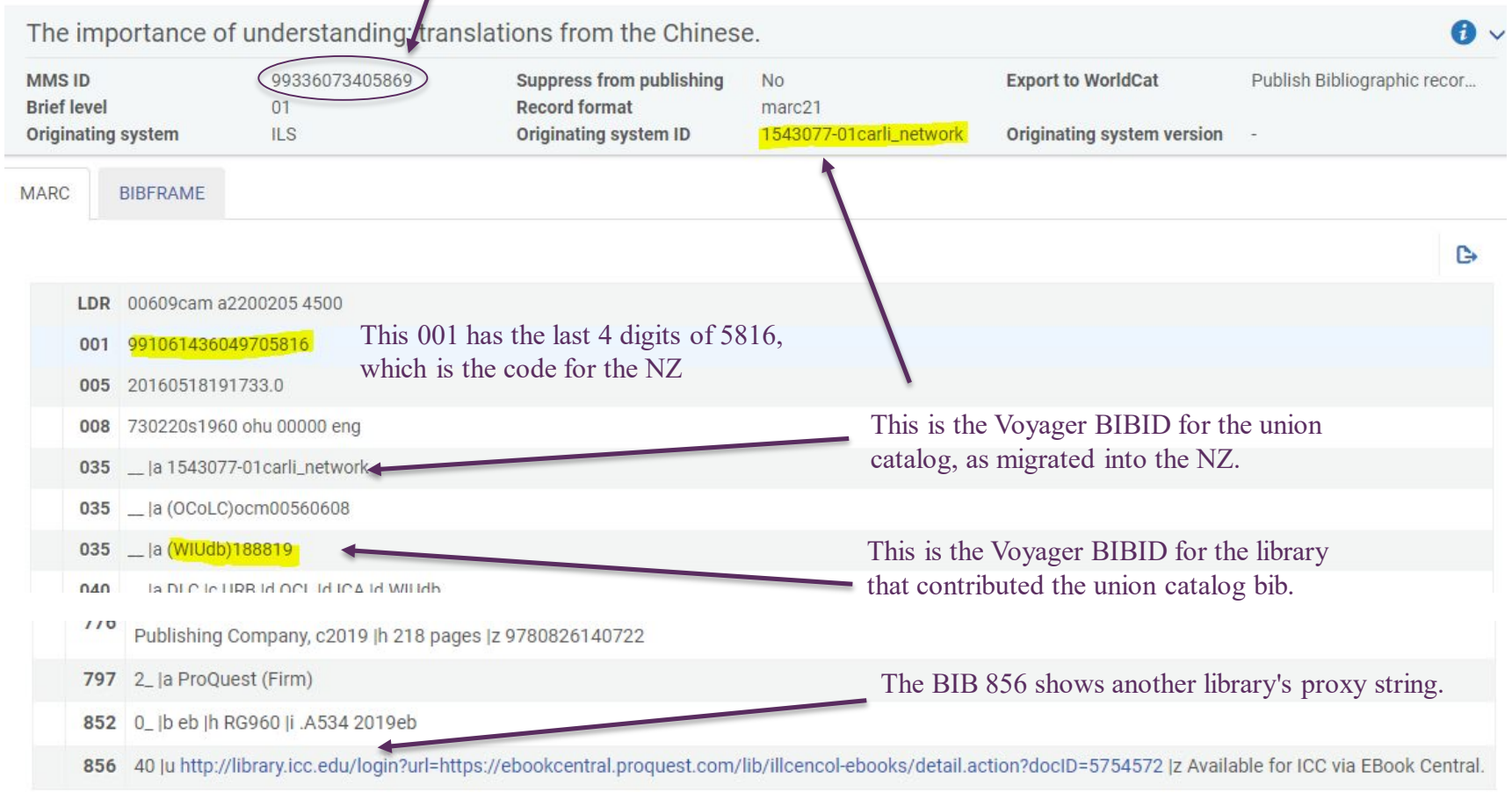
OPEN OFFICE HOURS FOR TECHNICAL SERVICES STAFF: LOCAL DATA IN ALMA

Network Zone Background
Main Collection Local Data
Local Fields for the Consortia
Additional Possibilities for Special Collections

- Your library's records were loaded to your IZ.
- P2E conversion moved your URLs into portfolios (which replaced MFHDs)
- IZ bibs were matched to NZ bibs using OCLC numbers in the 035$a and/or 035$z
    - If a match was made, you inherited the shared NZ bib record
    - If no matches, or too many, your IZ bib is unlinked.

TOPIC 1: NETWORK ZONE: INDICATIONS OF A NETWORK ZONE BIB

This is the MMS ID for this bib in your IZ;
the last 4 digits are your IZ code.



This 001 has the last 4 digits of 5816,
which is the code for the NZ

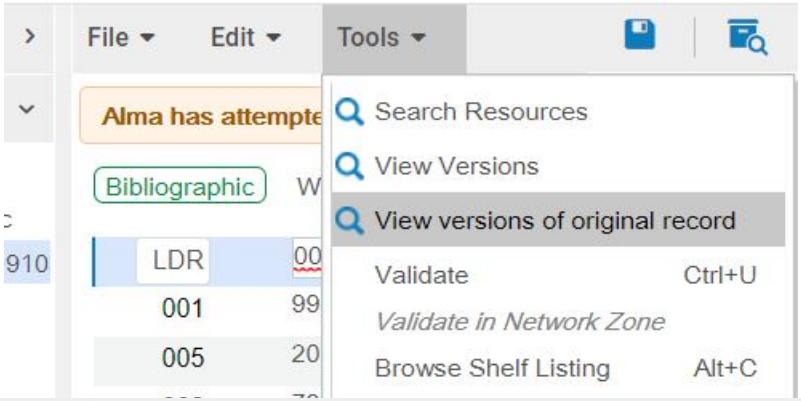
This is the Voyager BIBID for the union catalog, as migrated into the NZ.

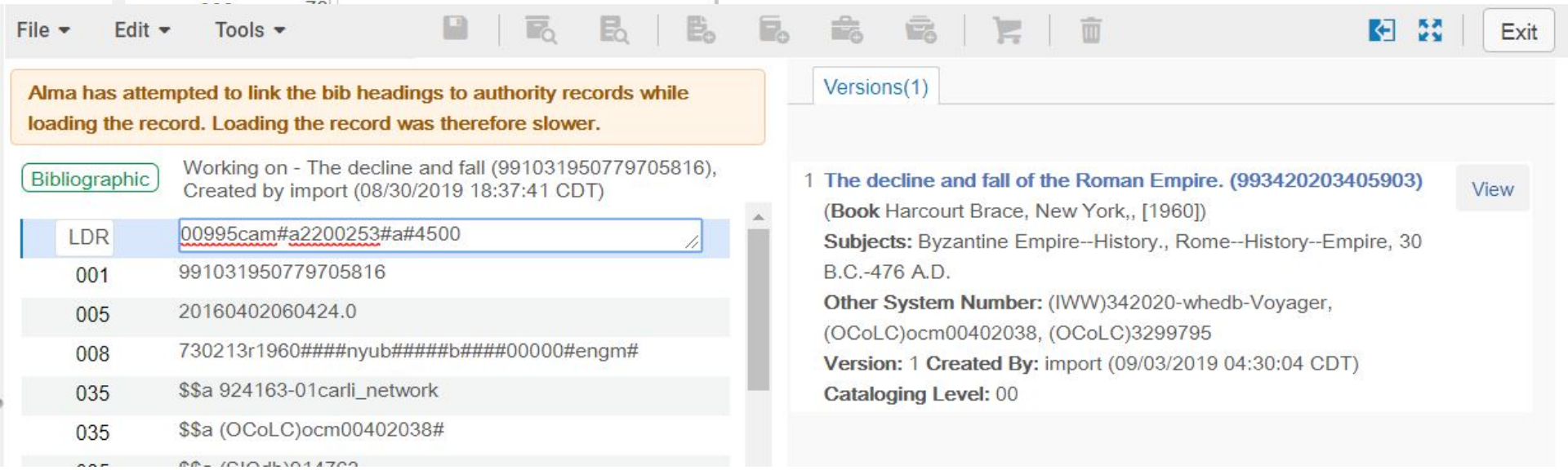
This is the Voyager BIBID for the library that contributed the union catalog bib.

The BIB 856 shows another library's proxy string.

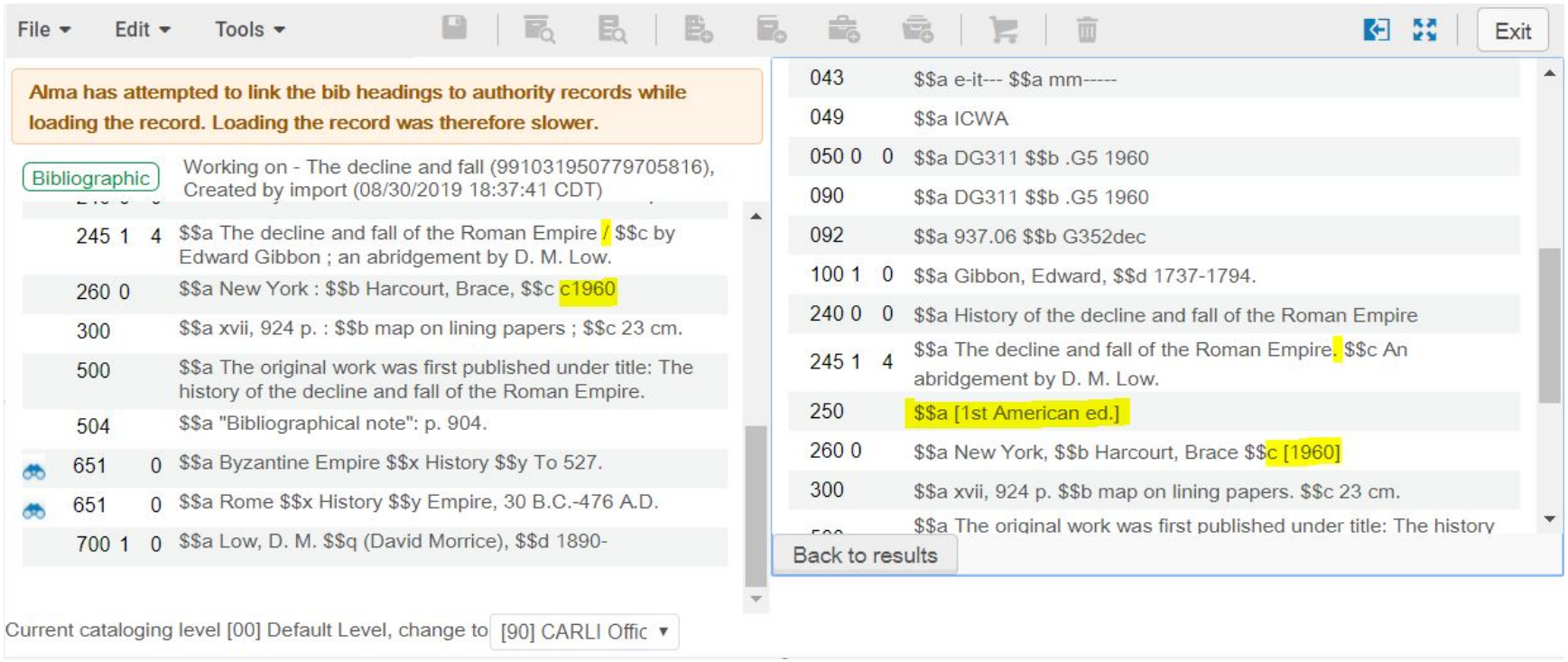
The p2e conversion will have moved your library's URL into the portfolio record.

- Your original bib is reviewable in the metadata editor: Tools > View versions of original record.

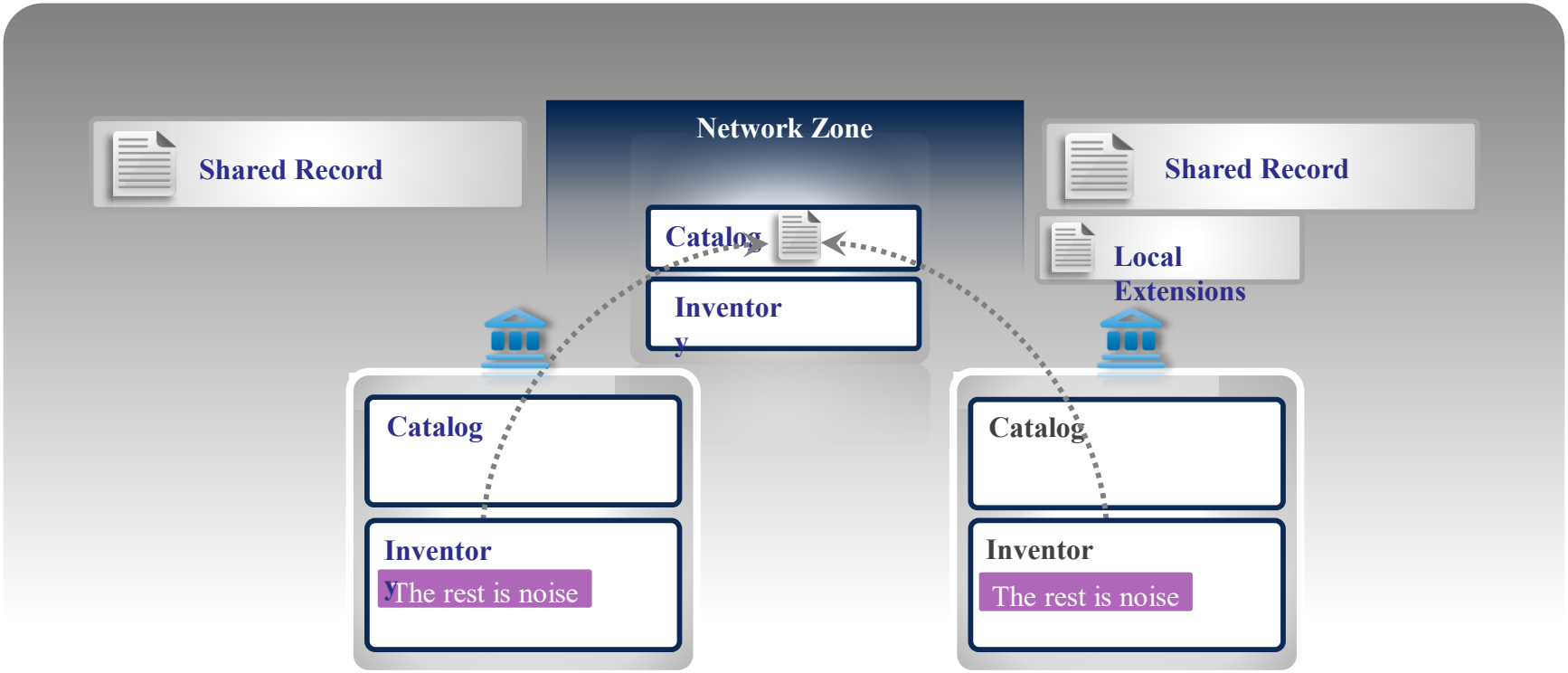




TOPIC 1: NETWORK ZONE: REVIEWING ORIGINAL BIBS



Network Record Relationships

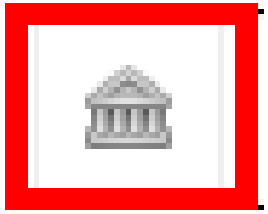


Migration Form Q23: Specify bib tags to be marked as local.

- Local Field Options During Migration:
  09X, 59X, 69X, 77X, 78X, and 95X-999

- Additional Local Extensions Available After Migration:
  900-949

https://www.carli.illinois.edu/products-services/i-share/alma/prepare-migform



Local Extensions

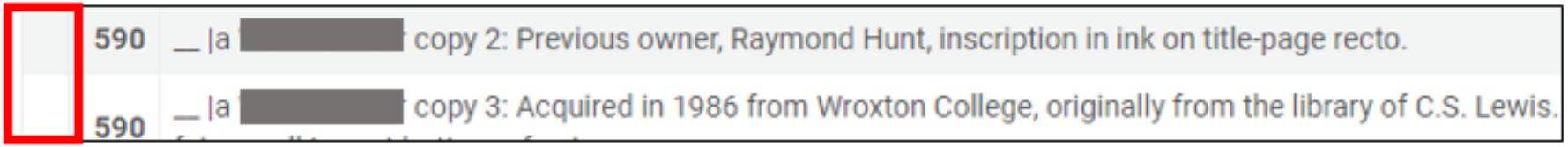
	590	__ |a Donated by Berenice Lawler O'Brien.
	590	__ |a Previously owned by Edith Hall Washburn.

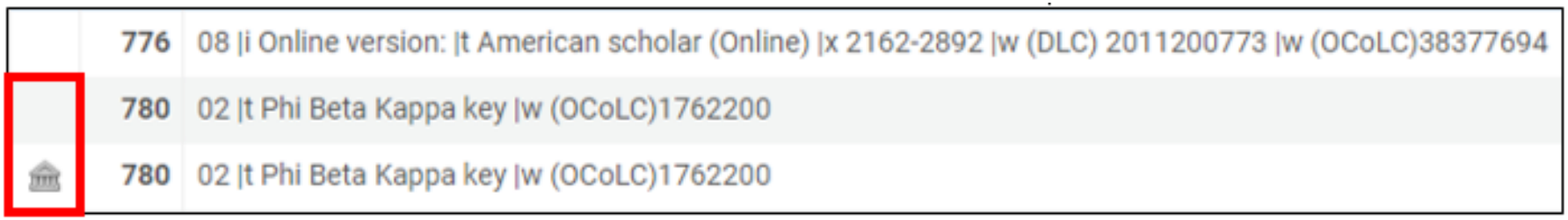
	590	__ |a "Donated from the Butler Childrens Literature Center"
	590	__ |a "Donated from the Butler Childrens Literature Center"

Reviewing how wide to cast your net:

-Do any tags still need to be included?

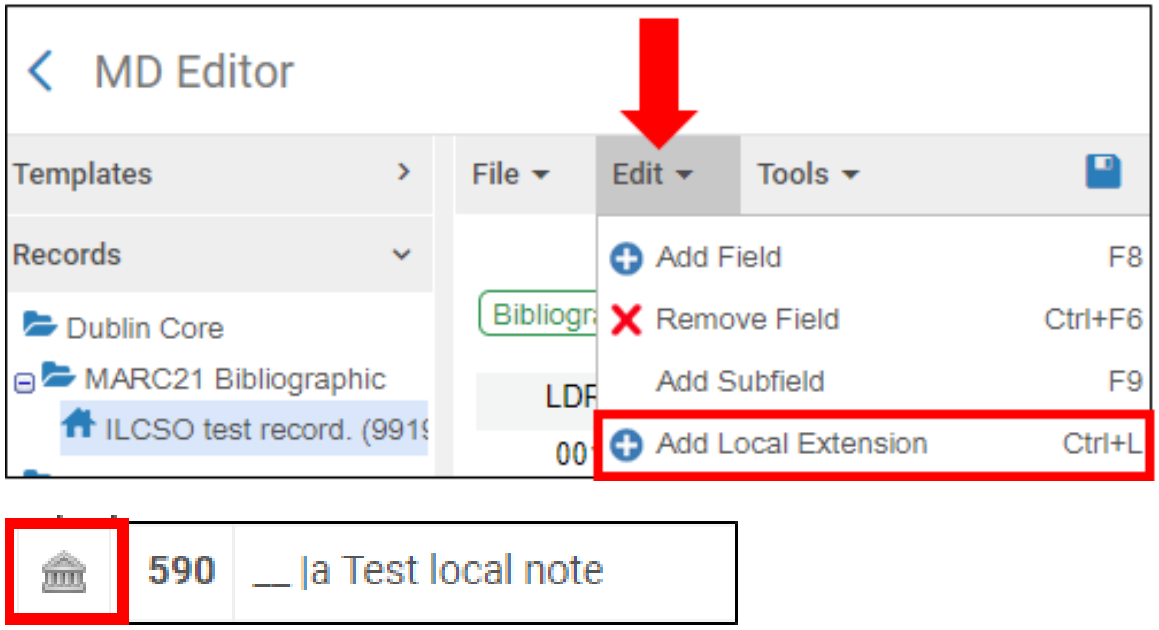
-Should any tags be excluded for the final migration?





Adding local extensions in Alma after migration:

In the MD Editor, select Edit – Add Local Extension



Batch edit local extensions after migration using a Bib Normalization Job.

Reference: "Network-Managed Records in a Network Zone"

Alma Local Extensions for Local, Copy-Specific Details

In Alma's consortial environment, bibliographic records are shared between the Network Zone (NZ) and each library's Institution Zone (IZ). The shared bibliographic record should contain descriptive metadata and authorized access points that apply to all copies of the work described. Individual I-Share libraries may add local description pertaining to their copies using designated local extensions, which are bibliographic MARC tags that are assigned to store and display metadata at the institution level. Libraries may also choose to record local data in holding records.

Ex Libris allows libraries to designate tags in the following ranges as local extensions: 09X, 59X, 69X, 77X, 78X, and 950-999. CARLI will be establishing some of these tags with consortial definitions for consistency in application, indexing, and reporting. Other tags will be left to libraries for their own needs.

The following table identifies the tags and their current definitions. As I-Share libraries become more comfortable with Alma, CARLI may establish additional fields as local extensions with a common consortial definition.

Tag or Tag Range	May Define Use	Common Definition (as of 8/16/2019)
09X	Libraries	Call numbers
59X	Libraries	Local Notes
69X	Libraries	Local Subject Added Entries
900-949	Ex Libris	Used by Ex Libris during Migration
950-955	Libraries	
956	↗ OCLC BF&S	Local Electronic Location and Access*
957	CARLI	Course Reserve for Migration
958	CARLI	Original Owning Library for Migration
959	CARLI	Voyager Bibliographic Record ID for Migration
960-999	Libraries	

https://www.carli.illinois.edu/products-services/i-share/alma/cataloging/local_extensions

- Premise #1, follow OCLC BF&S where practical and meaningful

Tag	Common Definition
09X	Local Call Number
590	Local Note
690	Local Subject Added Entry—Topical Term
691	Local Subject Added Entry—Geographic Name
696	Local Subject Added Entry—Personal Name
697	Local Subject Added Entry—Corporate Name
698	Local Subject Added Entry—Meeting Name
699	Local Subject Added Entry—Uniform Title
987	Local Romanization/Conversion History
994	OCLC-MARC Transaction Code

- Premise #2, Establish common fields to standardize input and display practices
  - Creating consistent Primo VE record displays between union view and institutions
  - Creating consistent EOD profiles that are easier to troubleshoot

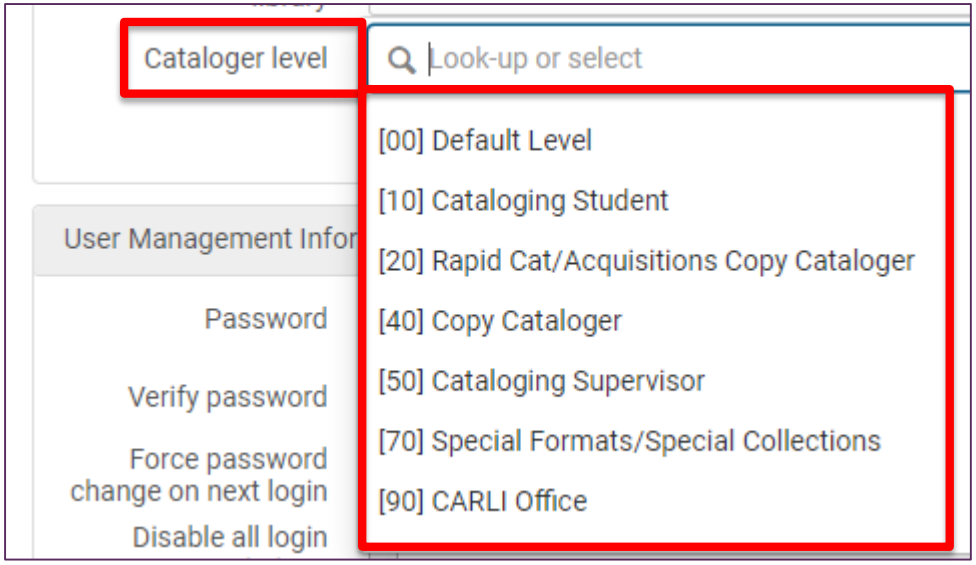
Tag	Possible Common Definition
591	Local Note: Immediate Source of Acquisition Note (e.g., 541)
592	Local Note: Terms Governing Use and Reproduction Note (e.g., 540)
593	Local Note: Binding Information (e.g., 563)
951	EOD: Line Item price, fund, location, copies
952	EOD: Title, identifiers, and notes
955	CARLI Last Copy Holding

Option 1: Link to the NZ, but Set Those Cataloging Levels High

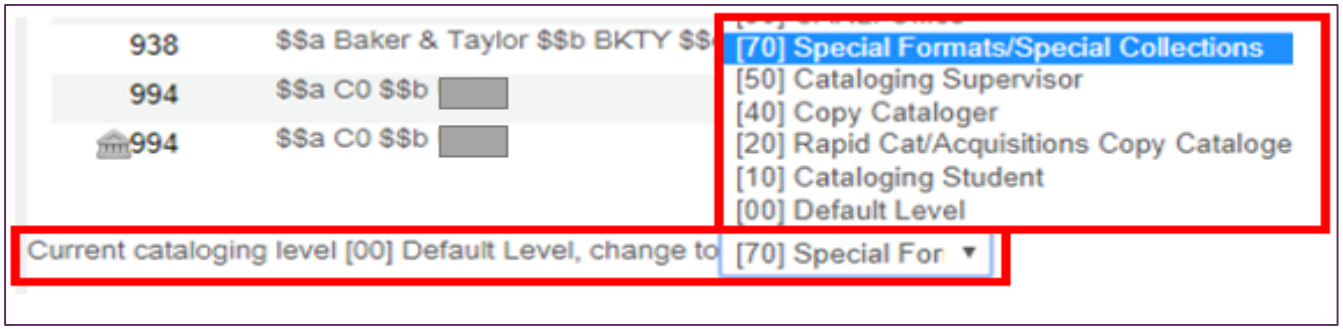
Code	Description
00	Default Level
10	Cataloging Student
20	Rapid Cat/Acquisitions Copy Cataloger
40	Copy Cataloger
50	Cataloging Supervisor
70	Special Formats/Special Collections
90	CARLI Office

Batch Job: Set Bib Records Cataloging Level

Cataloger Level in User Account



Cataloging Level in MD Editor



View Only – your cataloger level 10 is lower than record cataloging level 70

Option 2: Unlink from the NZ

Small percentage of database is special collections with significant local data beyond local extension capabilities.

Basic process:

- Create a set of NZ records;
- Run batch job to Unlink a set of records from the Network;
- Import original Voyager records, matching on bib IDs with the help of normalization rules;
- Overlay the unlinked NZ records in the IZ

Option 3: Relink to the NZ

Small percentage of database is general collections, the majority is special collections with significant local data beyond local extension capabilities.

Discuss, test, and develop recommendations for Day One on:

- Cataloger Levels
- Local Extensions
- Special Collections and Unique Data
- How and when to update the shared NZ bib record

Volunteer by contacting CARLI at support@carli.illinois.edu

- Name, institution
- Ability to commit to the work between December 2 and January 31
- Type of cataloging you do

QUESTIONS

Thank you!

Please Join us Thursday at 2pm for the

Alma Primo VE Office Hour

You can always contact CARLI at support@carli.Illinois.edu