I-SHARE NETWORK ZONE CATALOGING ADVISORY GROUP RECOMMENDATIONS

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I-Share Network Zone Cataloging Recommendations

https://www.carli.illinois.edu/products-services/i-share/alma/network-zone-guidelines

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A record in the NZ:

- Is shared by one or more libraries that have local details (local extensions and inventory) attached

- May be maintained centrally (e.g., authority control) or collaboratively (enhanced by members)

- Does not determine whether resource is discoverable
    - Primo VE looks at record suppression
    - IZ and NZ records are covered by "All I-Share Libraries" scope

- Does not determine whether resource may be requested or borrowed, and does not determine request promotion
    - Ability to request/borrow covered by fulfillment rules and TOUs
    - Request promotion determined by automated fulfillment network (AFN) rotas.

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1. Your library's records extracted from Voyager
2. Your library's records load to your IZ.
   - 957, 958; other local extensions added per migration form
   - 019$a copied to 035$z(OCoLC)
   - Holdings records modified per location sheet of migration form
3. P2E conversion moved your URLs into portfolios (which replaced MFHDs)
4. 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.

NZ1. CARLI recommends that all libraries have their IZ bib records linked to the bib records loaded to the NZ. This allows the NZ to facilitate collaborative technical services that reduces cataloging overhead at member institutions by gathering record enhancement and authority control activities to the network space.

- Resource sharing includes collaboration on technical services, and should create opportunities for better data in all IZs.
  - Central and distributed authority control
  - Bulk replacement of updated records from other sources (e.g., WorldCat Updates) once rather than multiple times
  - Identification of resources held by multiple libraries from the Alma bib
- Improve the return on investment in data and in Alma

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NZ2. CARLI recommends that, prior to migration, a library identify any institutional records containing descriptions of unique details specific to local holdings.

- Shared bib record may not completely or effectively describe unique copies of resources

- Options for local, copy-specific data include holdings records and Alma local extensions (see NZ9)

➤ More on this recommendation in a while

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NZ3. CARLI recommends and expects that libraries will relink their unlinked records to the NZ and improve the shared record at the earliest possible opportunity.

NZ4. CARLI recommends using match methods based on the original system record number (MARC Bib 035 values) when adding new records to the NZ, and when sharing or relinking IZ records to the NZ. Libraries may opt to limit matching to the OCLC number only. These match methods are named in Alma as:

- *035 (Other System Identifier) Match Method*
- *Unique OCLC Identifier Match Method*

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NZ5. Records that represent resources meeting one or more of the following criteria may remain unlinked from the NZ indefinitely, and be searchable only in the Alma IZ:

- **Records that you are contractually prohibited from sharing**
- Personal reserve materials
- Equipment
- Temporary collections
- Interlibrary loans from outside of I-Share
- Order records; especially records for unacquired resources
- Withdrawn/deaccessioned resources

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NZ6. CARLI recommends that libraries search the NZ at the time of cataloging using Alma's Network tab for appropriate catalog copy for resources. When possible for your given workflow, use an appropriate record from the NZ. If you import a record from external sources, when linking your record to an existing NZ record, take care to replace or merge data using the method that preserves the best form of the record.

- Awareness of record's existence
- Prevent duplication
- Prevent overwriting high quality
- Encourage overwriting lesser description

NZ7. CARLI recommends that libraries will enhance shared NZ records whenever possible with descriptive details and access points that improve discovery for all I-Share users. Record enhancements made in Alma should also be made in WorldCat whenever possible to save the time of the next cataloger, improve automated updates, and preserve enhancements for future reclamations.

- Updating and enhancing records improves everyone's records
    - Notes: Summaries, TOCs, Awards, Performers
    - Subjects, Series, Authorized Access Points
    - Linked Data
    - Corrections

NZ8. CARLI recommends that libraries make no changes to bibliographic records that will remove access points or diminish the description of the item.

- Keep headings from different thesauri, foreign languages, genre terms, etc.

- Do not make changes that will cause a full bibliographic record to represent a work different from that originally described.

  - Relink your holdings to a more appropriate record if needed.

- Do not replace a given copy of a record with a copy that has a lesser brief level as assessed in Alma by CARLI's brief record level rules.

CARLI BRIEF LEVEL RULES

CARLI Brief Level Rules	LDR position 17	Description
Brief 10	#, I, L	#= full level, I= full level input by OCLC participant, L= <obsolete - non-LC and non-NLM records>
Brief 09	1	1= full level, material not examined
Brief 07	2, 4, M	2= less-than-full level - material not examined, 4= <obsolete - core level>, M= batch loaded (less than full)
Brief 05	7, K	7= minimal level, K= minimum level by OCLC participants
Brief 04	8	8= prepublication
Brief 03	3	3= abbreviated level - does not meet minimum level
Brief 02	5	5= partial (preliminary) level - a record in process
Brief 01	U, Z	U= unknown, Z= not applicable

MD Editor

Templates

Records

Rules

📁 Brief level rules
   📁 Shared
      ➡️ 🔷 CARLI_BriefLevels_BasedOnLDR
      🏠 drools/BriefBasedOnLDR.dslr
      🔷 drools/BriefBasedOnLDR.dslr
      🏠 drools/BriefBasedOnRecordContent_Marc21.dslr
      🔷 drools/BriefBasedOnRecordContent_Marc21.dslr
      🏠 drools/BriefBasedOnRecordContent_Unimarc.dslr
      🔷 drools/BriefBasedOnRecordContent_Unimarc.dslr
      🏠 drools/OldBriefRule.dslr
      🔷 drools/OldBriefRule.dslr
      🏠 drools/OldBriefRule_Unimarc.dslr
      🔷 drools/OldBriefRule_Unimarc.dslr
      ➡️ 🏠 IZcopy_CARLI_BriefLevels_BasedOnLDR

```
rule "Brief 01"
when
    ((existsControl "LDR.{17,1}.U") OR
    (existsControl "LDR.{17,1}.u") OR
  | (existsControl "LDR.{17,1}.Z") OR
    (existsControl "LDR.{17,1}.z"))
then
    set brief_level."01"
end

rule "Brief 02"
when
    (existsControl "LDR.{17,1}.5")
then
    set brief_level."02"
end

rule "Brief 03"
when
    (existsControl "LDR.{17,1}.3")
then
    set brief_level."03"
end

rule "Brief 04"
when
    (existsControl "LDR.{17,1}.8")
then
    set brief_level."04"
end

rule "Brief 05"
```

1a. Create a Set of IZ titles using the Advanced Search:

All titles – Is linked – Equals – No

1b. Select *Save Query*, select set details

2a. Run the job *Identifying Brief Level*

2b. Review and Confirm job details

3. Review the job results: *Admin – Monitor Jobs*

View Brief Levels of an open bib record in the MD Editor:

Tools – Set Management Tags – Brief Level ##

Imports Match profile setting:

Do not override/merge a record with a lower brief version

| Merge method	**Overlay all fields but local** ▼
Select Action	☐ Allow bibliographic record deletion
	☑ Do not override/merge a record with lower brief version

NZ9. CARLI recommends that libraries apply Alma local extensions to their linked NZ bibliographic records, or use holding record notes fields to describe details that are unique to the institution's copy.

- CARLI recommends that catalogers enter local, copy-specific data to the fields identified on the CARLI Local Extensions for Local, Copy-Specific Data,which follow specific MARC field definitions.

- CARLI recommends that libraries may use MARC tags 590-599, and 990-999 to define any institution-specific fields that do not fit the uses identified in the CARLI Local Extensions recommendations.

- CARLI recommends that libraries consider using MARC Holdings Record tags to retain institution-specific fields, if concerned about maintaining data in a system-agnostic format.

CARLI I-Share
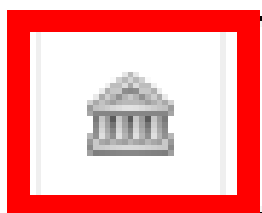
Local Extensions

| | 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" |

Adding local extensions in Alma after migration:

In the MD Editor, select Edit – Add Local Extension
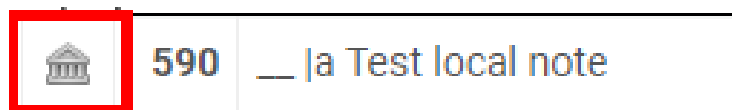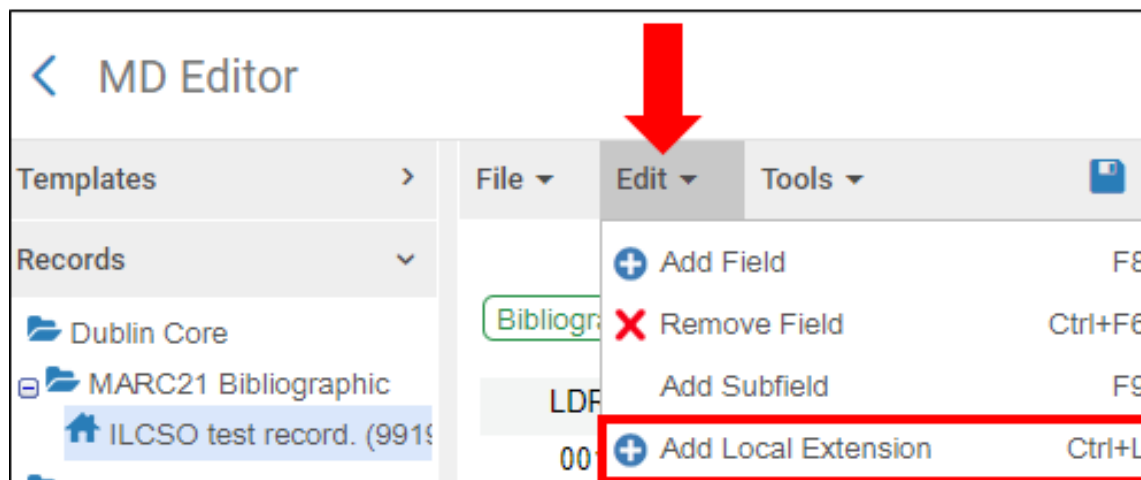
Normalization jobs may be used to apply local extensions after migration, and also apply local extensions to new, imported records.

Reference: Network-Managed Records in a Network Zone

- Linking to the NZ record is typically an ongoing benefit, allowing updates to the master record to benefit all institutions who have records linked.

- Institution- and copy-specific local data that exist in
    - holdings data in Voyager is preserved during migration
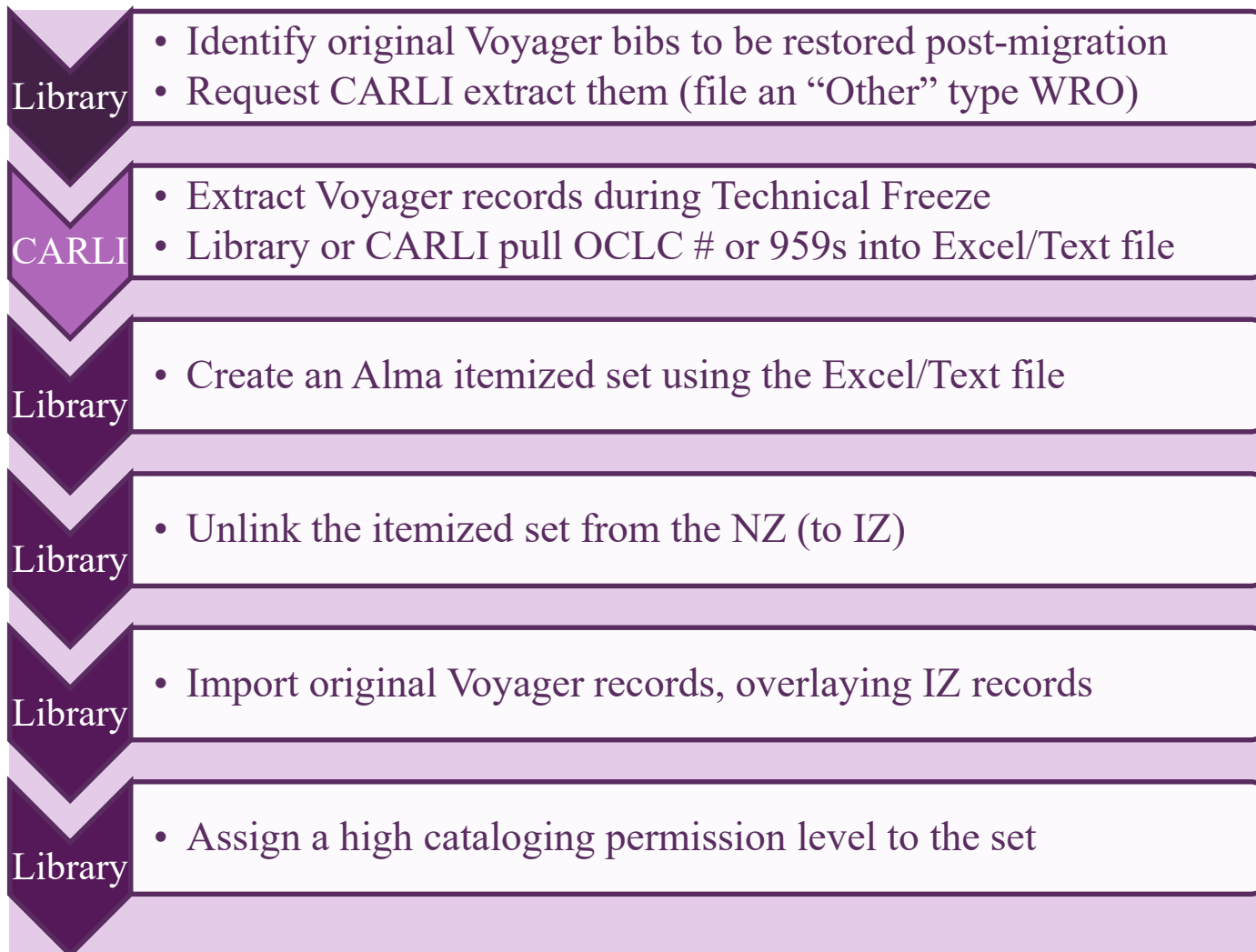   - bibliographic record fields 09X, 59X, 69X, 77X, 78X, and 950-999 during migration will transform into local extensions if designated in the migration questionnaire as fields containing local data.
        - Local extensions are visible only in the institution's IZ when a record is linked to the NZ record.
        - Before May 1, 2020, I-Share libraries can identify and move institution- and copy-specific data from other bibliographic fields to holdings records or one of the bibliographic fields that can be designated as a local extension in order to retain that data in the IZ during the migration to Alma.

    - Highly specialized bibliographic records containing item- or institution-specific data too extensive to be reasonably preserved through local extension fields should consider the *The Post-Migration Workflow to Restore Special Collections* as an intended workaround.

Library
- Identify original Voyager bibs to be restored post-migration
- Request CARLI extract them (file an "Other" type WRO)

CARLI
- Extract Voyager records during Technical Freeze
- Library or CARLI pull OCLC # or 959s into Excel/Text file

Library
- Create an Alma itemized set using the Excel/Text file

Library
- Unlink the itemized set from the NZ (to IZ)

Library
- Import original Voyager records, overlaying IZ records

Library
- Assign a high cataloging permission level to the set

Code	Level
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

Current cataloging level [00] Default Level, change to [70] Special For ▾

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If your library has documentation on local practices…

- Identify those practices and sample records that will help you and CARLI locate records.

Or, If your institutional memory is incomplete, but you know someone did something…

- Identify as much as you know and find sample records that will help you and CARLI locate records

Then…

- Get a small set of records and test the "Post-Migration Workflow"
- Consider moving data to *Local Extensions* or MFHDs ahead of migration.

Else, if you think that local data of this sort was used sparsely, or not at all, or only in MFHDs; then you're in good shape!

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Thank you!

Please contact us at
support@carli.Illinois.edu
with additional questions.