I-SHARE ALMA PRIMO VE OFFICE HOURS WILL START SHORTLY

CARLI I-Share

ExLibris a ProQuest Company

Welcome!

Office Hours will start at 2pm and run until 3pm

Please mute your microphone

As time permits, we will respond to questions typed in the chat box, and offline afterwards, as needed

This session will be recorded and made available on the CARLI website both as PDF slides and as a recording, with live links to all referenced resources

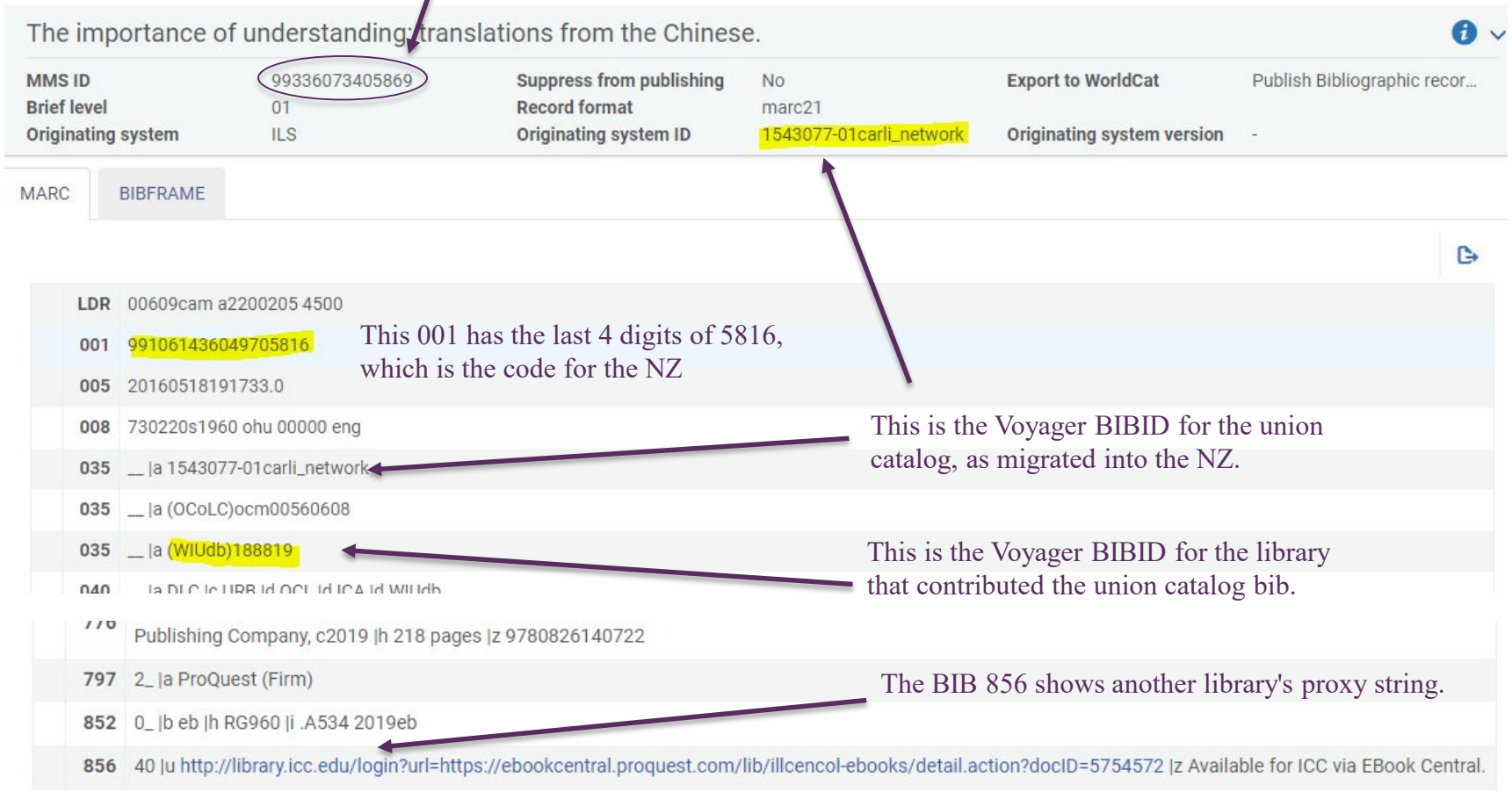
CARLI

OPEN OFFICE HOURS
DATA REVIEW & THE NETWORK ZONE

- Your library's records migrate to your IZ.
- P2E conversion moves your URLs into portfolios (which replace MFHDs)
- IZ bibs match to NZ bibs using OCLC numbers in the 035$a and/or 035$z
  - On match, you inherit the shared NZ bib record
  - If no matches, or too many, your IZ bib is unlinked.
    - Reports on unlinked records will be provided
    - After go live, libraries may adopt matching on any 035 data

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.

- CARLI created a new record set for the NZ
  - Your Voyager bibs with OCLC numbers in 035s
    - Your records without OCLC numbers are unlinked
    - E.g., short/acq bibs, vendor eResource bibs
  - No bibs that shouldn't be in the union catalog
    - 049 $u nouc; suppressed bibs
    - Bibs with no holdings
  - Use of quality hierarchy
    - For same bib 035: EncLvl I > blank > K > 8 > 3
- Goal: Create a better set of shared bibs

Data Review and Acceptance

- Use well-formatted records that exemplify different characteristics of your library's data to verify that data migrated correctly
  - According to the Voyager to Alma Migration Guide
  - According to your migration specifications
  - According to the types of data
- Select different records for different data scenarios
  - Are the MARC data still correct?
  - Are non-MARC data in the right fields?
  - Does the user interface display data predictably?

- Bib record test cases
  - Depend on whether record is IZ or NZ
  - Depend on whether the data being checked is in the bib
- For test cases involving data found in mfhds, items, order lines: test as normal

Bibliographic Records

#	Notable Features	Voyager Record # and Title or other Identifying info
1.	A "MARCette" or particularly brief bibliographic record	
2.	A particularly long bibliographic record—one that contains many fields	
3.	A record that contains a few particularly long fields	
4.	A record that contains repeated fields	
5.	A record that contains an 856 field	
6.	A record that contains diacritics in a heading field	
7.	A record that contains diacritics in a note field	
8.	A record at encoding level 8	
9.	A record for each type and bib level combo (am, as, gm, etc.). Use extra worksheet rows	

#1. When bib is an NZ record contributed by another library

- Verify match is correct
- Verify your inventory first
    - Mfhds & items
    - Portfolios for e-Resources
    - Orders as needed
    - Reading lists as needed
- Verify your local extensions
- Review your migrated bib to verify bib test case

Remember, if your library didn't contribute the bib, the contents are likely different from your copy; but that is not necessarily a problem.

#2. When bib is an NZ record contributed by your library

- Verify match is correct
- Verify your test case
- Verify your local extensions
- Review other bib data
    - Specifically, look at the MARC fields, not the Alma UI display
    - Compare like to like
- Verify your inventory
    - Mfhds & items, Portfolios for e-Resources
    - Orders and Reading lists as needed

In this scenario, if what you see is different from what's in your Voyager data, you may have a problem.

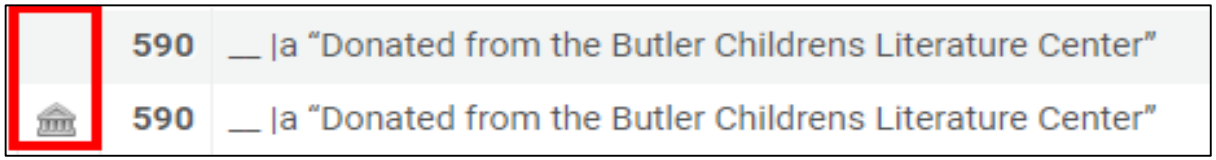
#3. When bib is an IZ record not shared with the NZ

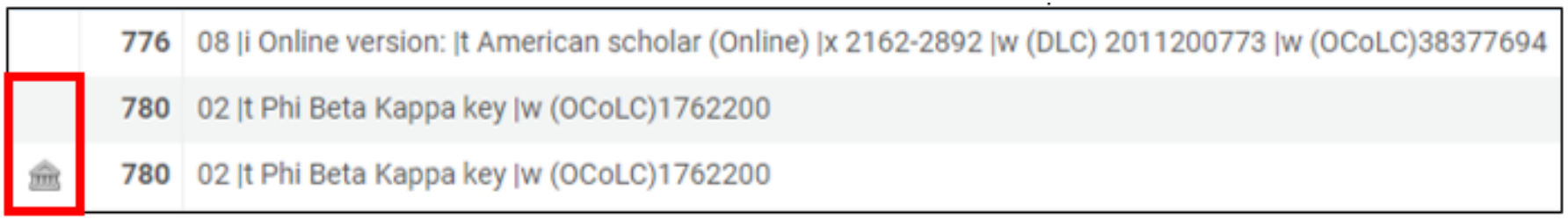
- Verify your test case
- Local extensions will look like other fields
- Review other bib data
    - Specifically, look at the MARC fields, not the Alma UI display
    - Compare like to like
- Verify your inventory
    - Mfhds & items, Portfolios for e-Resources
    - Orders and Reading lists as needed

In this scenario, if what you see is different from what's in your Voyager data, you may have a problem. However, a bib not linked to the NZ is not necessarily a problem for now.

REVIEW YOUR LOCAL EXTENSION SELECTIONS

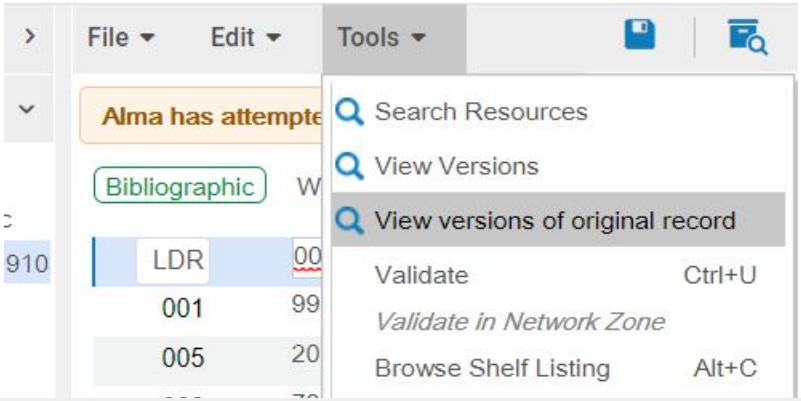
- Your Box folder > XXX Production Load > Alma Production Migration Form XXX_FINAL.xlsm
- Row 30: “Specify bib tags which will be marked as local…
  - 590##; 77###; 78###; 95###; 957##; 958##; 959##

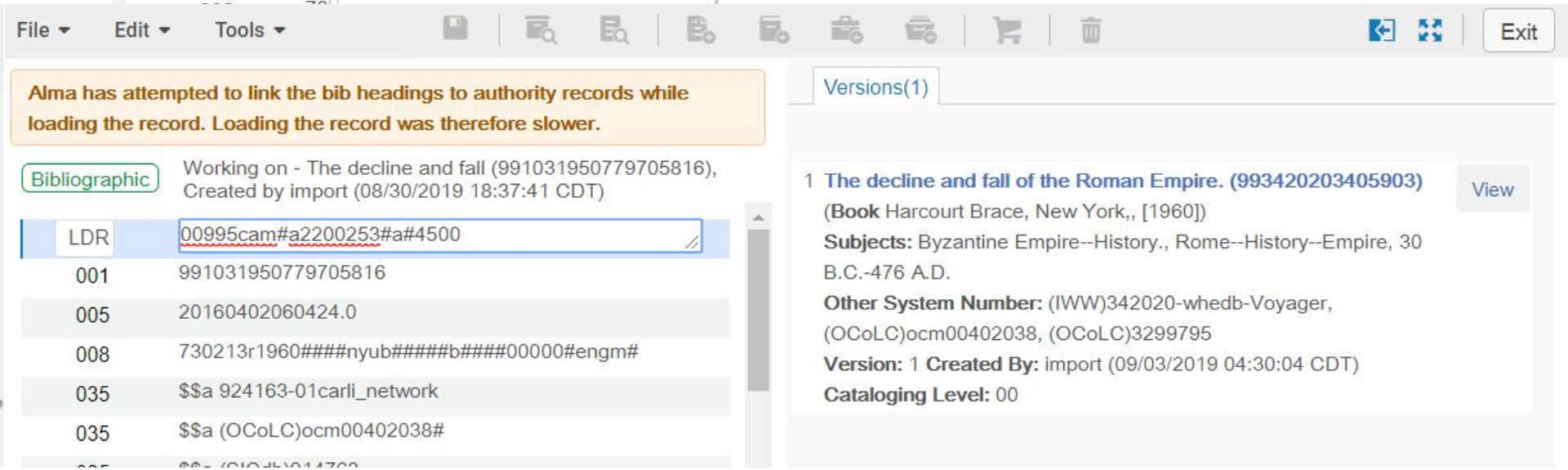




Remember, local extensions are tags applied in the IZ for an NZ record. IZ-only bibs do not need local extensions.

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





Bibliographic Records section (p.3-7)

https://www.carli.illinois.edu/sites/files/i-share/documentation/Alma_Test_Load_Migration_Worksheets_2019.docx

Row 4: “A record that contains repeated fields”

- E.g., multiple 246 or 700, some of which you added
- NZ bib may match what’s in WorldCat, i.e., with fewer tags

Row 8: “A record at encoding level 8”

- NZ bib might have EncLvl K or I
- NZ bib might have different 035$$a

- Bib record *Material Type* doesn't match Leader/06-07 in title results display
  - Alma's list is shorter than the actual list of formats
  - Tip: Compare the actual Leader values in MARC
- Item record *Material Type* doesn't match Leader/06-07
  - Alma contains a table of Physical Item Material Types
  - Extrapolated from item types and bib 007 at migration
  - In some cases, what you get is a guess.
  - It's actually NEW data, and is correctable after go live
- Another library's proxy is in my bib 856
  - For NZ records, the 856 will be that of the contributing library
  - Your 856—if you marked this record for P2E—will be in the portfolio: Electronic > View (portfolio) > Linking tab

QUESTIONS

Thank you!

Join us next Thursday at 2pm for another Office Hour

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