

Systemwide Cataloging Coordination Committee Alma migration meeting

August 23, 2019, 10 am

Kapi'olani Community College Library, Lama 111A

Notes

Attendees: Paul Beck (UH Hamilton Catss), Michael Chohey (UH Hamilton Cataloging), Alphie Garcia (UH West Oahu), Diane Johnson (Kauai), Sachiyo Kawaiaea (Honolulu Museum of Art), Luree Ohigashi-Oasay (JABSOM), Keiko Okuhara (Law), Allyson Ota (Honolulu), Nancy Sack (UH Hamilton Cataloging), Michelle Sturges (Kapi'olani), Kathleen Stacey (UH Hilo), Nackil Sung (UH Hamilton iAUL-Library Information Technology), Cindy Texeira (Windward), Jue Wang (Leeward), Eileen Yara (UH Hamilton Acquisitions)

1. How to protect shared bibs from bad batch jobs in Alma? (Nackil Sung)

a. Alma Restore Deleted Records Job

Michelle reported that the Alma job that allows a library to restore deleted records does not work in a configuration with a Network Zone. The UH Alma libraries will not be able to use the restore deleted records job to fix a bad batch delete job.

b. Batch jobs that affect records in the Network Zone (NZ)

Nackil reported that batch jobs to fix NZ records have to be run by someone logged into the NZ. If you are in an IZ, you can't run a job affecting records in the NZ.

Nancy pointed out that if the UH libraries are going to use the OCLC overwrite program to update OCLC-sourced bib records in the NZ, batch jobs run locally on those records will just get them out of sync with the OCLC master record which will be counterproductive.

Members discussed batch jobs that might need to be run in the Network Zone post migration.

i. Job to correct bound with information migrated from Voyager to Alma.

Nancy reported that the job is just a suppression job that doesn't change any record content and it only needs to be run once.

ii. Import jobs currently run by the Systems Office in Voyager

Nancy observed that it was hard to know for sure what jobs being run now by the Systems Office in Voyager might need a counterpart in Alma, because she was never able to get a complete list of jobs run by the Systems Office.

Members tried to come up with a list.

1. Marcive record loads.

UH Hamilton subscribes to the Marcive record program to keep their government documents records up-to-date. The record files include revised versions of existing bibs, so the files are imported so that the new bib versions will overwrite the existing bibs. Nancy reported that

she did not know how these loads would be handled in Alma, but in Voyager the way in which the files are loaded sometimes results in Marcive records overwriting completely different records.

2. Credo Reference

Four libraries (HCC, LCC, WCC, and UHWO) subscribe to the Credo Reference electronic package for which the vendor provides MARC records. Jue reported that in the past, Mariko Kershaw from Windward would edit the records and Carol Kellett from the Systems Office would load the edited bib file into Voyager. With Mariko and Carol having both left the UH Library System, it was unclear how Credo Reference records would be handled moving forward.

Nancy asked if anyone had tested out activating the Credo Reference package in the Alma Community Zone (CZ) to see what the quality of the records was. Nobody had as of yet. Nancy noted that if the CZ records were adequate, there would not be a need to load Credo Reference bibs into the NZ. Alpie said UH West Oahu would be willing to investigate.

3. Hein Online

Law subscribes to an electronic package called Hein Online for which the Systems Office performs incremental bib record loads. Keiko reported that the Law Library has investigated the Alma CZ records for Hein Online and found them to be unacceptably sketchy. In Alma, Law will continue to do the incremental bib record loads, though Keiko will be importing the files rather than someone at the Systems Office.

Nancy asked if Law had considered loading the records into its Institution Zone (IZ). Keiko reported that UH Hamilton's electronic resources librarian, Lori Ann Saeki, wanted to use Law's imported Hein Online records as well. For the Alma migration, both Law and Hamilton will turn off Hein Online in their SFX so that it is not migrated in using the CZ records. Law's imported Hein Online records will be usable for all UH Manoa patrons.

4. Patron-Driven Acquisition/Demand-Driven Acquisition (PDA/DDA) packages

Nackil reported that the two preferred approaches for handling PDA/DDA packages in Alma would be to either utilize records from the CZ or load vendor records into the NZ. Both UH Manoa and JABSOM have PDA/DDA packages that will require loading vendor records into the NZ.

In the situation where a library opts not to use CZ records for a PDA/DDA package, Nancy wondered if it would really be necessary for every institution to load its vendor records into the NZ. Perhaps importing into the IZ would be a better option, especially for smaller libraries.

Nancy said that her preference would be to not have batch imports into the NZ whenever it can be avoided. Jue observed that situations requiring batch imports would continue to arise and it would be good to set some policies. Keiko noted that Law would be happy to import their Hein Online into their IZ, but other libraries want to use those records and the idea was to import to the NZ so all could use.

Michelle noted that at the July meeting, the committee decided to always import records into the Network Zone, then link to them from the Institution Zone. She asked if the committee wanted to change that decision. She asked if it would work to start with everything going into the NZ, and then decide post-migration which bibs belonged in an Institution Zone. Nackil said the Orbis Cascade Alliance has a [document](#) that lists records that should not be in their NZ, (such as personal copy reserves).

Michelle noted that initially, all bibs in Voyager will be in the NZ, whether they would be better in the IZ or not. So some clean up may be necessary if certain bibs are designated as having to be in the IZ.

FOLLOW-UP: The committee will take a look at the [Orbis Cascade Alliance list of IZ-only bibs](#) and work on creating a similar list.

iii. Who is responsible for running batch jobs in the NZ?

Michelle observed that there were already enough NZ batch jobs planned for Alma to show there is a need for central expertise for batch jobs in the NZ. She asked Nackil how that would be done in Alma now that there was no longer a cataloging support person in the Systems Office.

Nackil said his thinking for all committees, but primarily cataloging, was that each functional committee would assign a person to be responsible for their functional NZ batch jobs. The functional committee would notify the Systems Office of their choice. The chosen person would be given access to the NZ and would then be responsible for running NZ batch jobs in their functional area on behalf of all UH Alma libraries. The Systems Office would work with SCCC and its delegated NZ maintenance to develop and test import profiles.

Nackil added that another option would be that the Systems Office can run some batch jobs in the NZ.

In addition to batch import jobs there will also be batch overlay jobs, particularly the daily OCLC updates. Nackil said these jobs need to be tested. One question is whether certain fields in the incoming record can be exempted from being brought in as part of the overlay. Nackil said the NZ merge fields job right now says everything gets brought in except local fields. He said he would show it to SCCC at the next meeting.

Nackil added that there is still a danger of unwanted fields being brought in when individual libraries import records singly. So in addition to batch job settings, there needs to be an agreed upon policy.

FOLLOW-UP: The committee will work with the Systems Office on rules for batch overlay and batch load jobs. The committee will also revisit policies for importing single bib records.

2. Converting 590 and 971 fields from bib notes (NZ) to local note (IZ) (Michelle Sturges)

Nackil reported that during the migration, we need to localize (i.e. move to a library's IZ) local data as much as possible. Local data left in the NZ is at risk of being wiped out by OCLC update overlays.

Michelle reported that Melanie can run clean-up jobs during or after the production load to convert local note fields like the 590 and the 971 from NZ to IZ. The jobs will basically say something like:

For every 590 subfield a that starts with KAP, create a matching 590 in the Kapiolani IZ and delete the original 590 from the NZ bib.

Michelle said one problem is that some libraries have not consistently used the same character string at the start of their 971s or 590s. Nancy said that would only be a problem if two libraries used the same character string so you couldn't tell which IZ the note should go into.

Nackil noted that Ex Libris makes a recommendation as to which 9xx fields should be used for local notes. It recommends that fields 900-949 be reserved for notes in the NZ and fields 950-999 be reserved for notes in the IZ. Nancy observed that Voyager 949 fields will have to be changed to a 9xx in the 950-999 range in Alma. Nancy added that SCCC will have to agree on how fields in the 950-999 range will be used since all libraries should be using the same field for the same thing.

Nackil noted that other local field ranges are 09x for local call numbers, 59x for local notes, and 69x for local subject headings. 69x headings have been used by Sinclair Audiovisual in the past. It is unclear whether they need to be retained. Nancy observed that Hamilton has some data in 79x fields that might need to be moved to a 59x field.

Luree reported that in Voyager she uses 971 fields to identify JABSOM records for bulk delete. She wanted to make sure she can do the same thing in Alma to avoid accidentally deleting another library's record as part of the batch job.

DECISION: The catalogers will ask Melanie to have the NZ 590s and 971s moved to the appropriate IZs as part of the migration (either during or post-migration).

FOLLOW-UP 1: Michelle will email SCCC to find out if there are any local fields other than the ones identified at the meeting (590, 971, and 949) that need to be moved to the IZ.

FOLLOW-UP 2: Michelle will work with Melanie to try out the proposed normalization rules in the test database to see if the method works.

FOLLOW-UP 3: SCCC will work with the Systems Office on the problem of changing 949 fields in Voyager to a tag that falls in the 950-999 range. SCCC will also work with the Systems Office to determine what data in the 949 can be used to identify which institution a 949 belongs to.

3. Proposal to crowd-source creation of a manual containing step-by-step instructions with screen shots (Nancy Sack)

Nancy observed that the UH libraries are going to need some kind of manual. She asked if the committee would like to work together on creating one. Many of the manuals from recently migrated Alma libraries that UH catalogers have been referring to are being moved behind fire walls, so the UH libraries should probably create one of their own. The manual would be kind of a cookbook, step-by-step for how get things done: how do we save a record, how do we overlay a record, remembering to release a record, how to create a holdings record and item record, how to withdraw something. Nancy observed the catalogers need to decide what to do when the last holdings is removed from a bib – delete or suppress?

Nancy asked for ideas on how to make a shared manual project happen, preferably before December. One suggestions was to create a list of cataloging tasks to be covered and divide up between members. Another was to have a template so content could be easily added without having to spend time on formatting. Nancy said she was thinking of a shared Google document. The initial content could be a list of tasks to be covered.

Alphie offered to provide information on using MarcEdit on exported records and importing back into Alma. Nancy noted that one difference in Alma compared to Voyager is when you export bibs from Alma the record numbers are from the IZ where the export took place. As part of the MarcEdit process you have to edit the record numbers to match those of the NZ if you want the edited records to replace the NZ versions. She added that if you are putting a lot of effort into editing large numbers of records, you risk having some of that work lost due to the OCLC update overlay program. Nancy observed that it is better to do enhancements or corrections in the OCLC record rather than the local Alma record.

Nancy said she would create a document with an outline of topics in the SCCC shared Alma team drive. Nackil observed that later it would be good if the information could be shared more widely since a team drive is usually only accessible to team members.

DECISION: The committee agreed to work together on a crowd-sourced UH Alma cataloging manual. Nancy Sack will create a document in the SCCC shared Alma team drive with an outline of topics for members to start working on.

4. Functional session with Melanie on NZ vs IZ configuration for cataloging workflows (Michelle Sturges)

Michelle asked members if there was a need to schedule a special Resource Management functional session with Melanie Fitter. Were there any topics or issues that needed special attention? Suggested topics were customizing search results displays in Alma (e.g. add call number and copy number to brief record display in Alma physical title searches); configuring Network Zone validation exceptions to include some fields that should be treated as valid but right now aren't in Alma; configuring Network Zone validation exceptions to accept some unique data elements common in UH Voyager records (e.g. old system numbers in 035 subfield 9).

DECISION: The committee felt there were enough topics to merit a special Resource Management functional session with Melanie Fitter. Michelle will try to schedule a session

5. Other business and Library updates

a. DEFAULT_NETWORK vs ENFORCE_NETWORK configuration in Alma

At the July meeting, the committee discussed configuration options that affect where bib records can be saved. At present UH Alma is configured as DEFAULT_NETWORK, meaning records can be saved to NZ or IZ, but the system defaults to NZ. There is also an option called ENFORCE_NETWORK that does not allow bibs to be saved to the IZ. Michelle asked Melanie Fitter about the ENFORCE_NETWORK option and Melanie said it is not recommended.

DECISION: The committee decided to stick with the DEFAULT_NETWORK setting.

b. OCLC record overlay program

Nancy reported that right now the OCLC update program was only set up to overlay records with UH Hamilton holdings. Other UH OCLC libraries need to decide if they also want to participate in that process, in which case their holdings can be added to the program.

FOLLOW-UP: UH Alma libraries with full OCLC membership wishing to have their OCLC-sourced records updated via the OCLC update program should contact the Systems Office.

c. Legacy SCCC Voyager policies

Nancy observed that some cataloging practices driven by policies set up for the Voyager shared database won't be necessary in Alma. For example, because all subject headings display to the public in Voyager, policy was to only retain headings from certain sources (Library of Congress, MeSH, OCLC fast). In Alma, Primo can be set to not search or display subject headings from certain sources, so there is no need to delete undesirable headings from bib records.

Nancy suggested the review be part of creating the shared manual.

DECISION: SCCC will begin reviewing and evaluating policies and procedures set up for Voyager to see which can be transferred to the Alma environment and which need to be revised.

d. 690/691 local subject fields

Nancy observed that the UH Sinclair Library Wong AV Center used to add local headings in 690 or 691 fields to records for their audiovisual materials. If those fields are useful for a particular institution, they should be moved to that institution's IZ since they will be overwritten in the NZ. In theory, since they were added to records with UH Sinclair holdings, they only need to be moved to the UH Manoa IZ. However, it is possible some libraries that also have holdings on these records would want to retain the 690/691 headings as well.

DECISION: Michelle will email the committee asking if any sites other than UH Manoa have been using 690/691 fields and need to have those fields moved to their IZ.

e. Searching for call numbers in Alma

Nancy reported there are two call number searches in Alma which can have very different results. The search labeled "Call Number" searches call numbers in bibliographic records. The search labeled "Permanent Call Number" searches call numbers in the holdings record.

f. Searching for Ex Libris Alma documentation

Michelle reported that during the week of on-site Alma functional training, Melanie Fitter recommended searching for Ex Libris Alma documentation using Google rather than using the Ex Libris documentation search. All the documentation is indexed by Google and the searches are faster and more effective. Also, you occasionally retrieve documentation from other Alma libraries that can be helpful as well.