Notes from the CARLI Primo VE – Become an Expert Discussion Section on "Local Data" March 18, 2021

Local Fields

Since there were no immediate questions, CARLI staff shared what they have been discussing as current recommendations for local fields and local resource types for I-Share.

These recommendations, background information, and details of the consortial issues have now been documented and posted to:

CARLI Recommendations on Local Fields in Primo VE for I-Share

There will hopefully be a Primo VE working group/task force in the future to help CARLI to configure a group of Local Fields for display to be distributed out from the NZ and to help determine how best to use Local Resource Types.

When asked if these consortial recommendation sounded OK to start, many attendees responded yes. CARLI will share widely on email list too so we can get feedback from everyone, including those not on call.

TRN described that they have data in 590 and 690 that they wanted to display. They added the fields using MARC21 Field Method--added a subfield and made it display if that subfield existed. It looked good but now concerned about it. When in all I-Share results, it attaches their contents to the field records in those labels. Will the CARLI Union View eliminate that?
CARLI: No, it will likely have the same issue. We will note this as a good example for evaluation of the potential consortial issues we are facing.

DPU was experimenting with normalization rules but need to go back and see if they implemented any of the changes. The catalogers were interested in trying to stop display of certain fields that had numbered subfields indicating the subject terms were unique to other institutions. They had been doing a little testing around this but are not sure if they ended up making a change now or not. It may have been other fields outside subjects too.
CARLI: the subject fields are in the "safe bucket" of out-of-box fields that come pre-configured with Primo VE. So we don't think we have to coordinate in the network the changes for rules for display for these items. They are only in an individual IZ and shouldn't affect anyone else. It might cause your own users to see something different in your IZ vs. some other IZ, though.

TRN: Primo VE gets reindexed periodically without asking for that, right? Like twice a year or something?
CARLI: Yes. They do semi-annually reindex Primo VE with the February and August releases. We are not sure if this reindex would catch things like records that would need to be reindexed after using the Normalization Rule Method for search/facet or not. Ancedotally, some indexing problems CARLI staff saw before the last Primo VE index in February 2021 were not automatically fixed by it and Cases had to be filed with Ex Libris.

Local Fields vs. Local Extensions -- two different things!

Local Fields -- think of them as "custom fields" – there are two methods for creation. MARC21 Field Method or Normalization Rule Method. MARC21 Field Method is easiest and has the least amount of concern for our consortial environment.
Local Extensions: are a set of fields (09X, 59X, 69X, 77X, 78X, 9XX) that can be applied to bibliographic records in Alma to indicate local IZ data in a shared network bib record.
Local Extensions may be Local Fields, if desired.

Local Resource Types

CARLI didn't realize that Local Resource Types would be discussed in today's Ex Libris webinar, so have just created another draft document with Recommendations for those. Ex Libris documentation states that *"For consortia, local resource types must be defined in both the IZ and NZ when IZ records are linked to the NZ."*
These issues were presented and have now been posted at:

CARLI Recommendations on Local Resource Types in Primo VE for I-Share

In addition, CARLI staff are aware of one I-Share library that did create Local Resource types and it caused even more issues in the Metadata Editor because they made a validation rule in the MDE and caused the library to not be able to save records if it failed the validation.

Record Differences Depending on Where the Item is Originating
BHC: This is tangentially related and I don't know that that it is a problem necessarily, but a weird thing we found in the BHC catalog. We were looking up an item record (Becoming, by Michelle Obama in this case). If we looked up the title in an All I-share search, it had a very limited Details section, but if we used a local search for the same title, it showed the full, more robust Details. BHC shows example of the two records. Very limited info on full display when doing all I-share search, much more details in full display when searching locally.

CARLI: This isn't necessarily unexpected. Let's look at the search scope we're in and look at the permalink for each record we're looking at. The MMS ID number will tell us which record and zone the item is coming from (IZ, NZ, or CZ). So the local version has an MMS ID where the last for digits are 5816 which tells us this is a record coming from the network zone. The MMS ID on the "more brief" record sees that it's a completely different record and it isn't linked to the NZ record. Not sure why this brief record might be showing, but it could be due to Primo VE deduplication. CARLI will be looking at these to see why it's occurring. Looks like it matched on the ISBN but it's for a physical item. Ted guesses it's probably a CZ bib, seeing how short the record is or it was a short bib added to get quick ERead Illinois records in as possible (or it's an order record or some such). If you check the library source field it might also say where the record is coming from. Best way to know is to look at the MMS ID or if from the CDI, the string in the permalink might be longer with some clue as to the fact it's from the CDI.

We currently don't have any control over the methods that Primo VE uses for FRBR or Dedup, but supposedly later in 2021 some options are to be introduced in a future release.

I-Share institution identifiers have a page on the CARLI website so you can know where the record is sourced from by looking at the MMS ID in the permalink at the last four digits: https://www.carli.illinois.edu/products-services/i-share/alma-config/I-Share-identifiers

RVC: I've noticed that there are often duplicate records for ebooks in the NZ. One from the CZ and one from the NZ (usually an OCLC record and better quality). Are there any plans to do anything about these?

CARLI: It's a big project that CARLI won't be able to do by itself. Next week's Tech Service Q&A on March 24 will talk about some duplicate record issues things, but CZ/NZ dedup issues are a big topic. Some that we see involved migration issues and P2E clean-up. One important thing to remember about NZ/IZ is that these are shared pools of data and not necessarily the single unique repository that has one copy of "best bib" in it. There will also be duplicates between NZ and CZs on ebooks depending on how they are cataloged. Some CZ bibs are awful. The long-term goal is to try to get the CZ bibs to be better, and as customers, let Ex Libris and other vendors know that you want better quality bibliographic records.

Another known issue, particularly with ebooks when doing a search that includes items from CDI/CZ and from IZ/NZ, is that there is no way to de-duplicate these. There is a very popular Idea Exchange out there and Ex Libris has said that they can't deduplicate records from the CZ with records from IZ/NZ.