



CARLI

TECH SERVICES Q&A 3/24/2021
NZ DOS, DON'TS, DEDUPLICATION

<https://www.carli.illinois.edu/products-services/i-share/cat/coop-cat-guidelines>

- Network Zone is a repository of shared records
 - Improvements to the shared record benefits all libraries using it.
 - Using shared records improves collection reporting.
 - Shared records may be WorldCat records or CZ-linked records
 - Shared records should be used for permanent collections
 - Exclude from NZ records for reserves, acquisitions, temporary collections, interlibrary loan bibs, equipment
- NZ will also include records for CARLI-provided collections
 - CARLI Ebooks projects
 - Small group projects (ERead Illinois, NILRC OverDrive)
 - CARLI-provided bibs should not be duplicated in IZs



- Do search the NZ using All Titles search
 - NZ does not have any physical inventory
 - NZ does have electronic inventory for shared collections
- Do share bibs for your permanent collections to the NZ
 - Sharing bibs helps reduce duplication of discovery data
 - Sharing bibs helps improve consortial collection analysis
- Do use local extensions and/or holdings details for institution-specific descriptive data
- Do keep the cataloging level for NZ records as “00 Default Level”
 - Use as needed for active clean-up projects
 - Use as needed to protect local data while transitioning to local extensions
- Do keep your bibliographic and inventory data up to date
 - Withdraw inventory that is no longer in your collection
 - WorldCat Updates to keep bibs fresh

- Do save your acquisitions bibs and PO lines to IZ bibs
 - Safer option for bib selection if unsure that you will receive the same item described by the record you chose.
 - Safer option for importing short order records and EOD data.
 - When cataloging, use Share with Network after selecting WorldCat bib; or relink to CZ bib (if desired)
 - <https://slcny.libguides.com/c.php?g=986218&p=7253307>
- What if our workflows are improved by starting with NZ?
 - Be familiar with techniques for relinking PO lines to new bibs
 - Be familiar with techniques for relinking inventory to new bibs
 - Use copy to catalog function to localize bib before doing any local merges



- Don't suppress new additions to the NZ
 - If a record is suppressed when first saved to NZ, then it is suppressed at network level
 - Requires CARLI staff to unsuppress for all
- Don't answer "No" when alerted to duplicates when saving
 - Review the matches, identify why there's a match
 - Resolve existing duplicates before linking/saving the new bib
- Don't replace WorldCat bibs with non-WorldCat bibs
 - If loading records for electronic titles, review bibs, load to IZ, talk to CARLI staff
 - If contracting for record enhancement, isolate records to IZ first
 - Look for ways to merge enhancements back to NZ bib
- Don't reload bibs for collections shared from the network
 - Results in double title counts in Analytics

- Merge Records and Combine Inventory
 - May run from metadata editor or as a job
 - Today's focus on metadata editor
- Focus on the outcomes as much as the record numbers
 - Open records in MDE
 - Identify which record has the latest/fullest set of data
 - More complete list of 035\$z
 - If the issue isn't in 035 data, which record has more useful and correct data?
 - View records in split screen
 - Select Merge Records and Combine Inventory Function
 - Preview the merge using **CONSORTIUM NZ Overlay all fields but local for Integration Profile, Import Profile, Combine and Merge Inventory**
 - Focus on outcomes: Is the DATA right?
 - Arrange editor frames to get the direction of the merge right.
 - Choose Delete for the old record, and Execute merge.
 - Be patient, don't save right away; exit MDE and release records.

- Same bib added around the same time
 - (OCoLC) 1103985402
- Triplicates
 - (OCoLC) 1137212432
- Duplicate bibs in NZ, one with no holdings
 - (OCoLC) 1195072
- One or more bibs have obsolete 035\$a
 - (OCoLC) 680661
 - (OCoLC) 21918372
 - (OCoLC) 345403 & (OCoLC) 948776

When are duplicate records not duplicates for the merge process?

- Multiple IZ bibs linked to the same NZ bib
 - DPU: (OCoLC) 1016919781 or (OCoLC) 1023538264
- CZ bib has wrong OCLC # for the format
 - ISBN 9789004284814 (was (OCoLC) 1145082067)
- NZ and CZ bibs with matching OCLC #: (OCoLC) 756501393
 - No clear action here for merging records in the NZ
 - Library must select which record to use for portfolio and link to it.
- CZ shenanigans (OCoLC) 715151737
 - Two CZ bibs, two descriptions, one OCLC number.
- Opportunities for CZ improvements: (OCoLC) 1249089
 - Gov docs bib, CZ bib good but missing 78X fields

- Merge process requires that records exist in same zone
 - IZ to IZ, or NZ to NZ
 - CZ records cannot be merged
- Process also requires inventory on records
 - If one of the records has no inventory, DELETE it
- MDE merge process works on only two records at a time
 - Additional merges require repeating the process
- Final merged record is incomplete
 - Finish the task by importing a fresh copy from WorldCat
 - What if merged bib has enhancements over WorldCat data?
 - ***Improve the WorldCat record for the next library***

- CARLI will post lists of duplicated NZ bibs by week of
 - OCLC numbers from NZ that have inventory
 - OCLC numbers from IZs that weren't linked to NZ
 - CARLI will delete NZ bibs that have no inventory
- Each library should work on its own IZ list
- Volunteers may claim parts of the NZ-inventory list



NOW, YOUR QUESTIONS



Session Chat

- 09:59:43 From Holly Nordheden : Good morning everyone!
- 10:01:50 From Ted Schwitzner, CARLI (he/him/his) : <https://www.carli.illinois.edu/products-services/i-share/cat/coop-cat-guidelines>
- 10:16:41 From Brent Eckert : Can the default be changed to keep the existing cataloging level, instead of changing to the cataloger's cataloging level? I sometimes forget to change it back to 00 when editing a record.
- 10:19:28 From Holly Nordheden : Yes, it would be nice if the system would ask you if you want to change it instead of automatically upgrading to your level. My Circulation/copy cataloger has lowered their level to 00, but she can raise it if she has a problem adding holdings since she has admin. privileges
- 10:19:36 From Cindy Bowen : @Brent yes, that's in Configuration > Resources > General > Other Settings > line number 61 "use record cataloging level by default"
- 10:19:56 From Cindy Bowen : (I think that's the right one)
- 10:21:03 From Gail Heideman - Greenville University : my table just goes to 35?
- 10:22:45 From Jolanta Radzik (JJC) : @Cindy: What should parameter value be? False or true?
- 10:22:52 From Jessica Gibson (CARLI) : Ex Libris documentation on the use_record_cataloging_level_by_default setting:
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/080Configuring_Resource_Management/060Configuring_Other_Settings#use_record_cataloging_level_by_default](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/080Configuring_Resource_Management/060Configuring_Other_Settings#use_record_cataloging_level_by_default)
- 10:23:20 From Cindy Bowen : @Jolanta true
- 10:23:20 From Ted Schwitzner, CARLI (he/him/his) : <https://slcny.libguides.com/c.php?g=986218&p=7253307>
- 10:30:35 From Jodi Craiglow : Even after I merge, it will give me that duplicate message when I go to save. Any way around that?
- 10:37:13 From Jodi Craiglow : OK. Good to know -- thanks!
- 10:37:21 From Michelle Gillen : I've noticed "multiple records" coming up when I am in OCLC exporting to ALMA. I've noticed the duplicates happening from a particular college...what should I do about eliminating/merging that record to the larger "shared" record?
- 10:38:25 From Rosalie Resendiz (she/her) : Bulk imports have a lot of Acq data in 9XX fields. Do we save as local extensions before sharing to NZ?
- 10:40:09 From Holly Nordheden : So if you get the error message about too many matches when trying to import from OCLC, you should go through these steps to merge in NZ before trying again to import from OCLC?

10:51:10 From Rosalie Resendiz (she/her) : Can you demo using the new MDE?

10:52:04 From Jen Masciadrelli, CARLI (she/her) : @Rosalie Ted will switch to the New MDE for a couple examples

10:52:14 From Rosalie Resendiz (she/her) : Thank you!

10:53:24 From Brent Eckert : When using the OCLC gateway import the record overlays any existing copy of the same record in Alma. What method of import is creating these duplicate copies of the same OCLC record?

10:56:10 From Holly Nordheden : How di you switch the order again?

10:57:01 From Brent Eckert : Why do some records have two forms of the 035 and others have only one?

11:01:57 From aschaller@jwcc.edu : How can we find out if we have duplicates in our IZ? Analytics? or do we need to contact CARLI for a report?

11:03:33 From lthompson : @aschaller I was just thinking the same thing! I was also thinking probably should look for things with no inventory as well.

11:04:59 From Holly Nordheden : AACR2/RDA punctuation is a quick clue to what is likely the newer record!

11:18:30 From Jen Masciadrelli, CARLI (she/her) :
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/040Resource_Management/070Advanced_Tools/020Using_Duplicate_Title_Analysis](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/070Advanced_Tools/020Using_Duplicate_Title_Analysis)

11:22:14 From Denise Green : Alex. St Press bibs didn't have OCLC#s at one time. So may not have matched and merged while much the same description otherwise.

11:26:09 From aschaller@jwcc.edu : How about records with no inventory? How can we find those records?

11:27:39 From lthompson : Running long is fine with me, speaking for myself only. Because this has all been SUPER helpful!

11:28:07 From Jen Masciadrelli, CARLI (she/her) : we'll be sure to record the whole thing for folks that need to leave

11:28:12 From Gail Heideman - Greenville University : agree

11:33:05 From Bryan Clark : Thank you, Ted.

11:33:11 From Bryan Clark : Gotta head out.

11:34:33 From Eric Neagle : If both bibs are connected to the same NZ record, can you just move one holdings to the other record?

11:39:45 From Holly Nordheden : So we don't want to delay adding our holdings when we import the first copy of a new bib into Alma!

11:46:39 From Bryan Hinds : If we find a duplicate issue and aren't feeling confident trying to solve it ourselves, is there a link you can share where to send those to CARLI or to which/whose email?

11:48:57 From Jen Masciadrelli, CARLI (she/her) : Please use: All Titles > Advanced Search > Add Condition: "Has inventory" > Equals "No"

Applying this search on *Physical Titles* will not succeed because this index has titles which have inventory, by definition.

11:49:18 From Jen Masciadrelli, CARLI (she/her) : Sorry, that was for Finding Records with no Inventory!

Please use: All Titles > Advanced Search > Add Condition: "Has inventory" > Equals "No"

Applying this search on *Physical Titles* will not succeed because this index has titles which have inventory, by definition.

11:49:46 From Jen Masciadrelli, CARLI (she/her) : @Bryan: please always email Support@carli.illinois.edu with any issues like that

11:53:13 From Eric Neagle : Yes!

11:54:00 From Eric Neagle : Got it. That makes sense. I hadn't considered orders.

11:54:45 From Jodi Craiglow : As someone who *has* brute-forced it in that way, I can say that merging is MUCH easier. :)

11:55:10 From Eric Neagle : Thanks everyone

11:55:52 From Bryan Hinds : Thanks!

11:56:13 From Sarah Levine French (she/her) : thank you!

11:56:28 From Gloria : aHHH!

11:56:39 From aschaller@jwcc.edu : Thank you for all the information

11:56:52 From Sylvia P : Thank you!

11:56:54 From Cynthia Scott : You all are great! Thanks for the help.

11:56:55 From Jodi Craiglow : Thanks, Ted and Jen! SUPER helpful session today!

11:56:56 From lthompson : Thank you both. Superb. 2 hrs is fine

11:56:58 From Rosalie Resendiz (she/her) : Thank you. Very helpful!

11:57:03 From Russell Kracke : Thanks all!

11:57:05 From Juanita : Thank you.

11:57:07 From Holly Nordheden : Excellent as always!

11:57:08 From constance.k.lee : Thank you, very helpful

11:57:14 From Susan Tidwell to Ted Schwitzner, CARLI (he/him/his)(Privately) : Thank You