Welcome!

The webinar will start at 10:30 am and run until noon.

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

TECH SERVICES Q&A 3/24/2021
EXPORTING RECORDS
AND OTHER ODDS AND ENDS

- Exporting Bibliographic Records
- Preview NZ-level configurations under consideration
- Summer technical services maintenance ideas

Why would I export records?

- OCLC holdings reclamation, or streamlined holdings update

- Sharing records to another system

    - Rapid ILL, Find More Illinois

- Sharing records to a vendor

    - OCLC GreenGlass; BackStage Library Works; EDS

- Working on records outside Alma

    - MarcEdit clean-up

    - Data analysis

CARLI website, Exporting Bibliographic Records

https://www.carli.illinois.edu/products-services/i-share/physical-res-man/export-records

What's the difference between export and publishing?

- Scheduling
    - Publishing may be scheduled to run regularly
    - Exports are on demand jobs
- Content modification
    - Pub: Includes options to enrich bibs with other various other data
        - E.g., item data, linked data, management tags
        - May apply normalization rules.
    - Export: Includes option to enrich bibs with holdings data
        - Other data types (items, portfolios) have unique export jobs
- Output Options
    - Pub: May send to FTP, OAI, Z39.50
    - Export: May send to FTP

Q&A on Exports

- Is anyone using EDS?
- Would this be a way to get holdings into OCLC? (LHRs)
  - LHRs are a separate process in Alma
  - LHRs use publishing profiles, so the work is similar
  - Watch this space! We'll be in touch soon on getting the process right.
- What are benefits of setting LHRs?
  - Ability to support your library's ILL staff
- If LHRs need updating, should we wait to do that or work on fixing them?
  - If you have them in OCLC, you/we can request the data from OCLC.
  - If your Alma data are more up-to-date, then start clean-up now.
  - Primo VE prefers to show 866 data (out of the box)

Q&A on Exports

- Does Alma automatically send data to OCLC for new items?
  - Yes, using the Data Sync publishing profile
  - Data sent daily at 5:00 a.m. for new items and deletions
  - Changing export to OCLC to "Don't publish" deletes, as does record deletion.
- What about Google Scholar publishing?
  - See CARLI website
  - Publish Primo VE to Google—needs research
- Collection Manager is just better for managing WorldCat holdings for e-resources.
  - Can do more with publishing as well

Looking around at other consortia and evaluating what works and doesn't for us, we may want to make some changes:

- Disabling matching to CZ bib records
  - Fine tunes matching only to records in IZ and NZ
  - Ignores any OCLC numbers in CZ bibs that might match
- Disabling Cataloging Levels
  - Not well understood, not consistently applied
  - Hinders some processes, irrelevant to other related processes
- Item Description Patterns
  - Sharing patterns could make item descriptions more uniform
  - More uniform descriptions make AFN requests for multi-part resources work

- Cleaning up item descriptions
  - Common description patterns
  - Cleanup of enumeration and chronology fields
    - Alma expects Enumeration should be a number (or letter), no caption
    - Similarly, Chronology should be a year, or month, or day
- P2E Cleanup and Bib-Inventory Format Matching
  - Identify and set item material types
  - Identify and set portfolio material types
  - Separate e-inventory from bibs used for physical inventory
- Linking Records to NZ / Resolving Duplicate Bibs
  - IHLS CMC team continuing to help through June
  - CARLI staff working on better reports for finding and evaluating duplicate bibs – More soon
  - Finding and cleaning up bibs with multiple OCLC 035$a

- Alma Metadata Editor
  - No news on when the old MDE goes away for good.
  - New template functionality in April.
- DEI work
  - CARLI staff and Technical Services Committee
  - Evaluating and refining DEI processes from SUNY, CSU
  - Testing in sandboxes, proposals to CARLI Board

Questions?