Welcome!

The webinar will start at 2:00 pm and run until noon.

Please mute your microphone and webcam.

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.

Today's slides: https://www.carli.illinois.edu/techservqa_20220921
Past webinars: https://go.illinois.edu/CARLItsqa

CARLI

TECH SERVICES Q&A 9/21/2022
LINK RECORDS TO THE NZ

- Announcements
- Linking Bib Records to the NZ
- Q&A

Today's slides available on the event page:

https://www.carli.illinois.edu/techservqa_20220921

| Sun	Mon	Tue	Wed	Thu	Fri	Sat
				Sept 22 1:00 CARLI Libraries and the Pandemic		
					Sept 30 2:00 LTAF: The AFN in Alma/Primo	
Oct 2 Alma Monthly Release		Oct 4 2:00 Strategic Planning Open Session	Oct 5 10:00 Strategic Planning Open Session			
				Oct 13 2:00 APVE Open Office Hours: Title Reduction Project	Oct 14 2:00 LTAF: Idea Exchange, Known Issues, Support	

CARLI
I-Share

(Re)Linking Bibliographic Records to the Network Zone

Ted Schwitzner (CARLI)

The Network Zone (NZ) serves as a common repository for bibliographic records for all members, and as an environment for centralized, collaborative management of these records.

- NZ records are shared to IZs, match on OCLC number
- CARLI built NZ from Voyager catalog bibs
- IZ linking done after migration; no links for multi-matches
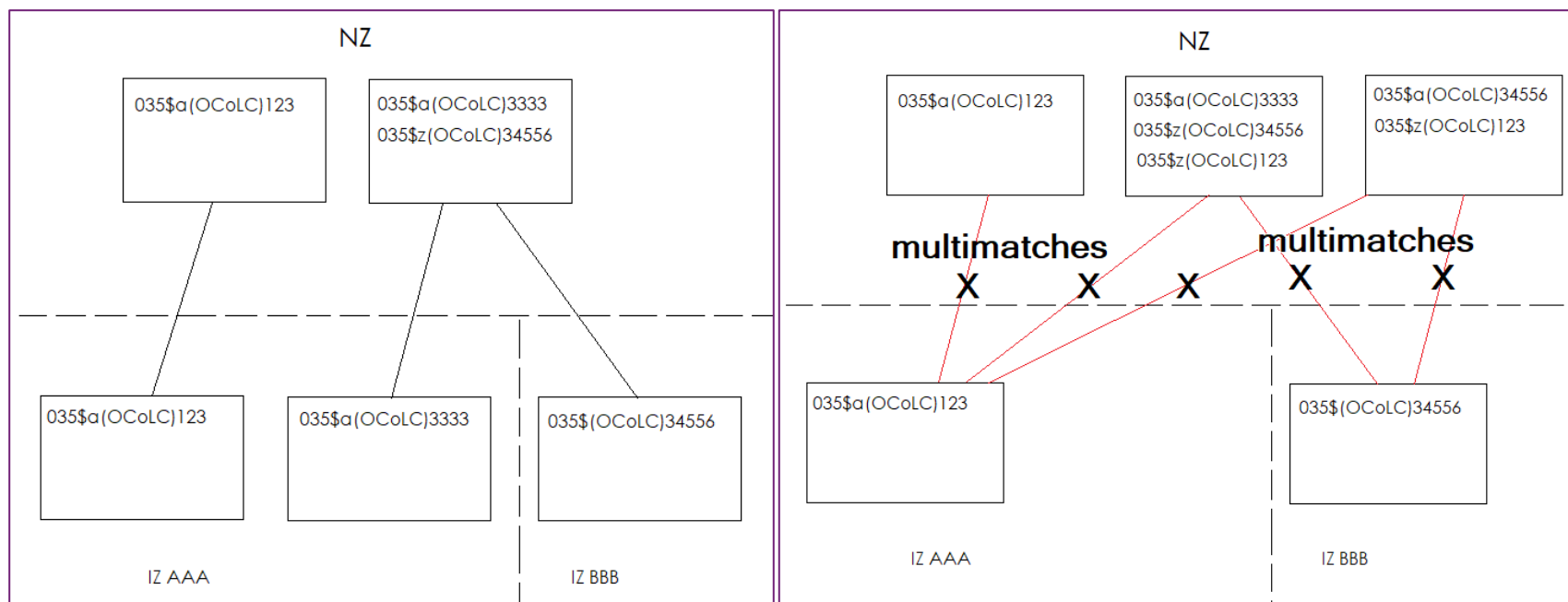
Find your unlinked records: Titles searches, advanced

- Is Linked equals no
- OCLC Control Number (035a) is not empty
- For physical inventory, select your permanent locations

After creating the set, itemize the set as well.

Find your unlinked records: Analytics

– Shared CARLI folder: Resource Management

- Titles, Physical inventory, not linked to the NZ
- Titles, Electronic inventory, not linked to the NZ

Title

Titles, Physical inventory, not linked to the NZ

Table

Institution Code	MMS Id	OCLC Control Number (035a)	OCLC Control Number (035z)	Network Id	Linked to NZ	Linked to CZ	Title	Author	Publication Date
01CARLI_ADL	9993405818	8804883	927137		No	No	The idea of freedom : a dialectical examination of the conceptions of freedom /	Adler, Mortimer Jerome, 1902-2001.	1958-61.
01CARLI_ADL	9993405818	8804883	927137		No	No	The idea of freedom : a dialectical examination of the conceptions of freedom /	Adler, Mortimer Jerome, 1902-2001.	1958-61.
01CARLI_ADL	99113405818	2120093	6163257		No	No	Yoga and psychotherapy : the evolution of consciousness /	Rama, Swami, 1925-	c1976.
01CARLI_ADL	991793405818	5692434	193532; 953433732		No	No	The Individual Psychology of Alfred Adler : a Systematic Presentation in Selections from His Writings /	Adler, Alfred, 1870-1937, author.	[1956]

You may use these reports to create itemized sets.

Evaluate your records and your options

- Relink bib records in batches
  - **Run a Job > Link a set of records to the Network Zone**
  - Consider making the batches smaller, e.g., by location or call number
  - Some records will still not link because of NZ duplicates—that's okay
- Relink bib records one at a time in the metadata editor
  - Optionally, merge NZ duplicates in the NZ, or report duplicates to CARLI
  - **Record Actions > Share with Network**:
  - *View matching records, then link to a matching bib.*
- Don't link record
  - We'll come back to this

- Admin menu > Manage Jobs and Sets > Run a Job
- Link a set of records to the Network Zone
- Select set name
- Set job criteria
  - Match method (serial/non-serial): Unique OCLC Identifier Match Method
  - Upon no match: Contribute IZ Records

Job Report

Counters

Number of records sucessfully linked	12
Number of records with multi-match	2
Link to download file with list of the local records mapped to the Multiple matched NZ's records	Download file
Number of records failed to link	2
Number of records contributed to Network Zone	2
Number of errors	0

C:\Ted Local\Downloads\759953210005860_multi_match - Notepad++

File   Edit   Search   View   Encoding   Language   Settings   Tools   Macro   Run   Plugins   Window   ?

759953210005860_multi_match

```
1  99946538905860 991094078749705816; 991018844959705816;
2  99715488905860 991039549079705816; 991022490629705816;
3
```

- Record Actions menu > Share with network

- Matched records exist… Do you want to view them? *Yes*

- In split editor pane, view matching records
  - Choose Link
  - Upon no match: Contribute IZ Records
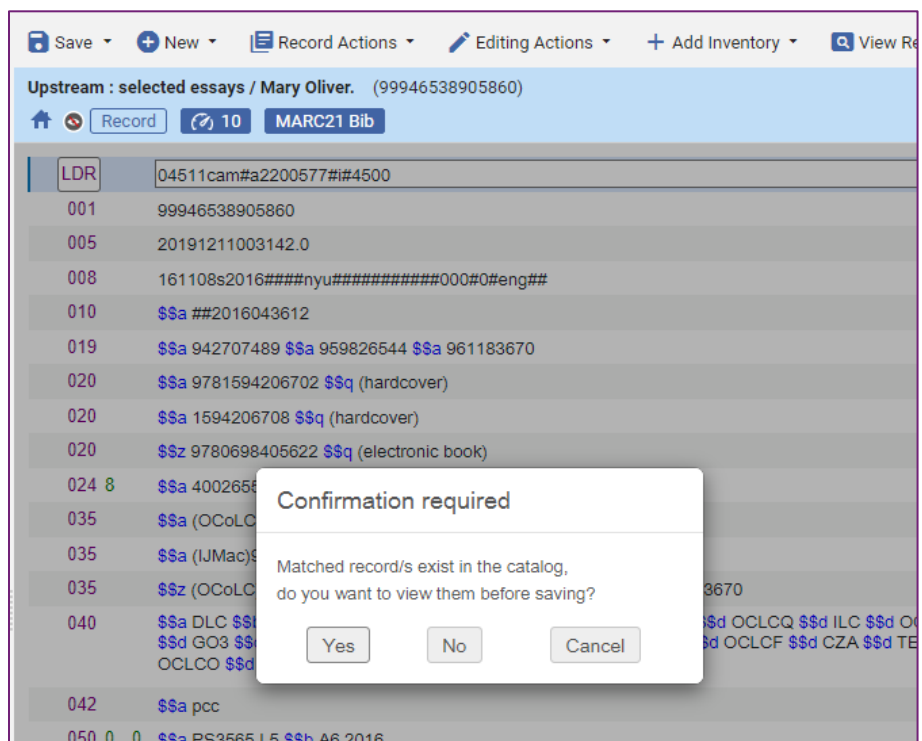
Practical outcomes

– Multimatches identified via reports or sets

  • Reports can be routed to CARLI for cleanup by IHLS CMC

– Single matches linked to the NZ record

  • Your IZ bib = NZ bib (+ any IZ local extension data)

  • Bib can be updated with Connexion gateway export to NZ

– No matches: Your IZ record becomes the NZ bib record

Consortial outcomes

– NZ-shared records show other I-Share libraries more inventory

– Updates to NZ-shared records benefit all linked bibs

  • New imports, authority updates, etc.

– NZ-shared records only count once per identifier for title metrics

  • IZ-only records are counted separately from NZ-records

But my record was better than the NZ record!

- NZ linking only contributes when the record is first in
- View versions of original record to review your old record
  - Original record may be lost after NZ record merges

But the NZ record doesn't look like my record!

- Or it's fine for me, but what about other libraries' copies?
- Sometimes, OCLC merges have unexpected results
- Go back to basics and current cataloging rules
- Communicate with each other (and OCLC if the merge is suspect)
- Could be a good reason to keep unlinked for the moment

Is there a better way?

- Automated cleanup versus one record at a time (x 16,000,000)

- Are Newberry records in the NZ?
  - Newberry records were contributed in the initial NZ build, but they are not routinely added since migration.
  - Records not in the NZ may still be visible in Primo VE if searching the "All Libraries" scope. PVE includes a "union view" that finds matching bibs from all active IZs (whether shared with NZ or not).
- What happens when there are IZ duplicates before linking?
  - Multiple IZ bibs can be linked to the same NZ bib, but this is not recommended—the MDE will only show you the NZ bib, so you may have difficulty with making adjustments to the IZ details you want. Best practice: eliminate IZ duplicates first.
- Is there a recommended timeline for this work? Will CARLI help run this if requested or unable?
  - Yes, CARLI is willing to work with you on a scope and timeline that fits your needs.

00:13:50   Gail Heideman - Knox College: Thanks, Amy!

00:14:35   Amy Maroso: Slides: https://www.carli.illinois.edu/techservqa_20220921

00:15:58   Amy Maroso: CARLI Calendar; https://www.carli.illinois.edu/calendar

00:28:12   Amy Maroso: Draft handout for "Linking your records to the NZ": https://www.carli.illinois.edu/sites/files/i-share/documentation/Linking%20to%20the%20NZ%20draft.pdf

00:51:01   karsten: Are the Newberry records in the NZ?

00:53:30   Brent Eckert: We are doing a weeding project currently and I'm finding many of the weeding candidates (older books) are unlinked. So, weeding can help fix some of the problems also.

00:55:14   Eric Neagle: What happens when you run the job to link to NZ but the IZ record already has a match in the IZ (like from different libraries at our institution). I assume both will end up linked to the NZ. Is there a way to locate records with that scenario in order to merge the IZ records first? Or after they are both linked to NZ?

00:59:10   Eric Neagle: Frightening! Haha!

01:00:42   Eric Neagle: Ok. Sounds good. I'll see if I can locate matches in the IZ first.

01:02:16   Brent Eckert: Is there a recommended timeline for completing this work? Will CARLI do run linking jobs for libraries if they request it or are unable to do it themselves?

01:03:45   Brent Eckert: I see there are only 53 people in this Zoom meeting. That's not even one from every library.

01:05:24   Jodi Craiglow: Could you give us the file path for the linking-related analyses again?

01:06:18   Jodi Craiglow: Fabulous. Thanks!

01:07:47   Denise Green: Thank you all for coming.

01:08:37   Gail Heideman - Knox College: Wow, there are a lot on my report. Is there a recommended set size?

01:10:30   Blake Walter IHLS: My experience has been that Alma has been robust handling large sets (5,000+); the amount of time can depend very much on how busy the network is.

01:10:36   Gail Heideman - Knox College: If we try and records fail, they will just reappear on the report again, correct?

01:11:33   Andrew Belongea: Thank you!

01:11:40   Bill Schultz: Thanks, all!

01:11:41   cwubbena: Thank you Ted and CARLI Staff!

01:11:44   Lori Thompson: Thanks Ted, thanks all