



CARLI

CATALOGING Q&A

9/21/2020



- Authority Record Loading Pilot
- MARCIVE and Gov Docs Cataloging Pilot
- Expanding OCLC Connexion Gateway Export document
- Import Profiles for WorldCat Collection Manager Updates
- Network Zone record merges
  - Import process for multi-match
  - Import process for CZ match
- Community Zone cataloging records
  - When to edit and when to report
  - When to import bibs for collections vs. when to use CZ

- Document without NZ password on CARLI Website
- Document with NZ password in each IZ's box folder
- Updates in September 2020
  - Updated error messages for gateway export
  - Updated gateway export passwords for sandboxes

- CZ “offers users the opportunity to update bibliographic records, add portfolios..., contribute collections and contribute general electronic services.”
  - Ideally includes one bib record, provider-neutral, not identical to source record, for every title represented by portfolio or collection in the Central KB (i.e., e-resources only)
  - CKB includes portfolios, services, packages, collections
  - Authority records from multiple sources
    - LC Names
    - LC Subjects
    - NLM MESH
    - FAST
    - GSAFD

- [Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities.](#)
  - Ensure that all members of their institution are aware of and comply with guidelines and policies
  - Certify that the records are available for contribution, are free and unencumbered by any other license, claim, or usage policy, and do not violate any third party's rights.
  - Only make changes that would benefit the quality of the record for use by the entire community, according to the standards defined later in this document.
  - Not engage in any activity that would misrepresent or diminish the value of the Community Catalog for others.

- What you're likely to find
  - CZ bibs linked into IZ
  - CZ bibs linked into NZ
  - CZ bibs available for use
- When to fix and when to report
  - Fix: Bib description data other than ISBN/ISSN
  - Report: ISBN/ISSN issues
  - Report: Portfolio coverage, availability, etc.
  - Report: to CARLI or to Ex Libris
- Knowledge Center: Content Corner
  - Collection List & Submission Guide
  - Knowledge Articles



13:47:56 From Holly Nordheden : Does that included changing ISBN from subfield a to z?

13:50:01 From Jessica Gibson : Community Zone Contribution Guidelines:  
[https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/040Metadata\\_Management/110Community\\_Zone\\_Contribution\\_Guidelines#Bibliographic\\_Record\\_Contribution](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/040Metadata_Management/110Community_Zone_Contribution_Guidelines#Bibliographic_Record_Contribution) . For the PDF Ted was just showing, click the link in the 4th paragraph entitled "Alma Community Catalog: Cataloging Standards, Policies, Rights, and Responsibilities

13:52:08 From Shirley Haworth : --

13:52:28 From Jodi Craiglow : When I try to order an NZ record that's tied to the CZ, Alma gives me an error message. I have to go back and order from the CZ. Do we know why that is?

14:00:05 From kdauksz : has the next gov docs meeting been scheduled?

14:00:54 From Mary Konkel : I'd like to turn off the data sync from OCLC as our workflow sets OCLC holdings when the item is cataloged. Will that impact anything on CARLI's end?

14:01:06 From Cary Cline : As far as editing CZ bib records, I get that we can improve fields that are there, but if it's really minimal, can we also add fields?

14:01:56 From David Stern : Does anyone have a simple document showing the step-by-step process for adding and activating an Ebook-One Time Record? (We created the order and PO, but now need to add the URL info.)

14:04:15 From Mary Konkel : WHAT!

14:04:38 From Mary Konkel : Even if we are downloading directly from OCLC?

14:04:56 From Mary Konkel : We want to avoid having holdings set at point of ordering.

14:05:16 From Mary Konkel : Gotcha!

14:05:31 From Holly Nordheden : We don't process materials fast enough to want them to display in OCLC before their cataloged!!!

14:08:20 From Heidi Lundquist : When we withdraw items in Alma, thought that would automatically update in OCLC and that is not happening. how do we fix that? do we need to change a setting? thanks

14:10:00 From kolney1 : What should the timing/delay be on the export to WorldCat "don't publish" check box? Is the change immediate? After an overnight job is run?

14:10:53 From Edith List : What doesn't happen when a bib record isn't saved and released a record? I've had a staff member forget to release records, but I can't figure out if there is anything to fix as a result.

14:11:43 From David Stern : Yes.

14:11:51 From Jean Bigger : Yes please.



- 14:12:44 From R Resendiz : To add to Heidi's question. At Morton we've deleted items and holdings (weeded music CDs). This has not triggered updates in OCLC. We've tried updating the Set management tags in bibs (in the NZ) and Alma will not save changes.
- 14:15:05 From Jonathan Nabe : I find it easiest to import a record for ebooks using an import profile. During that process I import the bib and the import profile will create a portfolio based on settings in the import profile (if you specify standalone portfolio vs. if you specify that the ebook should be added to a specific collection. )
- 14:15:28 From Denise Green @CARLI : Adding Portfolios Individually to an Electronic Collection section in
- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/050Inventory/020Managing\\_Electronic\\_Resources#Adding\\_Portfolios\\_Individually\\_to\\_an\\_Electronic\\_Collection](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Adding_Portfolios_Individually_to_an_Electronic_Collection)
- or
- [https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/040Resource\\_Management/050Inventory/020Managing\\_Electronic\\_Resources#Managing\\_Local\\_Portfolios](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/040Resource_Management/050Inventory/020Managing_Electronic_Resources#Managing_Local_Portfolios)
- 14:18:34 From gporter : Is it possible to create an electronic collection from an itemized set?
- 14:19:47 From Heidi Lundquist : thanks for your response and seeing the follow up question!
- 14:29:42 From Julie W. : If we are adding portfolios from a vendor to a local collection that are not in the CZ, do we need to contribute them to the CZ? Are we also supposed to share them in the NZ. Right now they are in the our local collection and viewable in the IZ.
- 14:32:19 From Mingyan Li : What are the difference between local defined work order process types and the existing process types in I see in "Analytics"? We are working on setting up the local defined work order process types and still trying to figure out how they work. Thanks!
- 14:33:43 From Tami Luedtke : We've been trying to create local electronic collections from local itemized sets of streaming video cataloging records (e.g. a Swank collection). But we find that the portfolio bibs are not using the bibs we put in the itemized set but rather create a "stubby" portfolio bib record. One of our questions is if there is a way to use records that would create the portfolio records directly using the cataloging records in the IZ
- 14:33:46 From gporter : Denise asked me to send in explanation and examples which I will do. It's from existing "group" of ebooks.
- 14:34:13 From Elaine Page : Tammi, I'm about to start that project too with Swank titles, and I'm confused too.
- 14:34:40 From Cynthia : From a local collection you can add portfolios from a Set.

14:37:16 From Cindy Bowen : yes, what Cynthia said, with the caveat that it has to be an electronic portfolio set

14:37:51 From Theodore Carl Schwitzner : <https://ideas.exlibrisgroup.com/forums/574345-content>

14:41:00 From Julie W. : Thanks

14:43:47 From Mingyan Li : What about those process types not available?

14:44:07 From Mary Konkel : However, if you have a small "shop" with only 1 person doing the task, you can function quite well with not using work orders at all.

14:44:26 From Mary Konkel : College of DuPage is not using work orders.

14:44:42 From Jean Bigger : Neither is IMSA

14:44:44 From kdauksz : We don't use them either

14:44:58 From kdauksz : post it notes are still useful :)

14:44:59 From ldaw : working thru without at MON

14:45:04 From Mary Elzinga : Roosevelt has just started using WO

14:45:04 From Mingyan Li : Sure. Thanks!

14:46:24 From Jonathan Nabe : See slides 22 and 23 from Oct. 3 2019 presentation at <https://www.carli.illinois.edu/sites/files/i-share/documentation/OfficeHours191003Slides.pdf>

14:46:24 From Edith List : I need to do a Swank set as well

14:46:38 From Jonathan Nabe : On how to create collections from standalone portfolios

14:47:04 From Cindy Bowen : I've basically been following those directions from the Oct 3 presentation that Jonathan just linked :)

14:50:05 From Holly Nordheden : We're "quarantining" materials after handling in T.S. before giving to Circulation. It's delaying new materials reaching the shelf. Any suggestions on workflow in Alma so we know where they are?

14:50:35 From Julie Adamski : For those not using work orders, how are you getting your items in mending or cataloging to show up as "not available" in Primo?

14:51:25 From kdauksz : ISL leaves them in cataloging until they are ready for shelving and circ

14:51:26 From Mary Konkel : You can suppress them from Discovery OR set them to a temporary location of Technical Services.

14:52:01 From Holly Nordheden : Thanks everyone

14:52:05 From Julie Adamski : Thanks!

14:53:01 From Sharon Nelson : We check them out to a dummy "repair" patron.

14:53:41 From Mary Konkel : We change locations/settings when truck of newly cataloged items are ready to go shelving, which would include quarantine time. If no backload in mending and we can get it out in a day or 2, we don't bother.

14:53:42 From Jonathan Nabe : You can use a work order.

14:53:48 From Cindy Bowen : post-cataloging processing is one area where I'm thinking work orders might be a solution but I haven't figured it out yet

14:56:23 From Julie Adamski : We're using work orders, but it's a lot of extra work for a small shop like ours - must scan it in as done in Tech Serv and then change our "at location" to circ and scan it in again

14:56:59 From John and Lori Thompson : Really helpful as usual. Thank you for these informal sessions!

14:57:05 From Mary Konkel : A lot depends on your situation, locations, any backlogs, and ease of communication between circulation and tech services processing. We are just around the corner, so our processes are simpler.

14:57:32 From kdauksz : Please repaet that - you cut in and out

14:57:42 From Julie Adamski : When we put it in our temp locations, it still shows up to patrons as "available" in Primo

14:57:46 From Mary Konkel : KISS principle!

14:58:22 From Holly Nordheden : The negative to work orders during Covid is more handling ...

14:59:13 From Jean Bigger : Would love to have some cataloging training on using templates.

14:59:57 From Lori Murphy : We use work orders for scores that are going to the bindery.

15:00:40 From Jonathan Nabe : Thank you!

15:00:45 From John and Lori Thompson : Thanks!

15:00:45 From Jean Bigger : Thanks CARLI!

15:00:46 From Mary Konkel : Things will be different in a non-COVID environment. Right now our acquisitions are heavily focused on e-resources as we continue to be closed and in remote learning.

15:00:50 From Jean Bigger : Soon please.

15:00:51 From Holly Nordheden : Please keep them coming!!!

15:00:51 From Idaw : this is great! THANKS!!!

15:00:55 From Denise Green @CARLI : Thank you all for coming.

15:00:56 From Cynthia : Thank you!!

15:00:58 From Marcella Nowak : Thank you.

15:00:58 From Megan Ruenz : Thanks!