Linking your records to the NZ

Introduction

CARLI consortial cataloging guidelines recommend that all permanent collections be shared with the network.

Due to the size of the consortium, when we migrated from Voyager, our network zone catalog was constructed differently than usual. CARLI was tasked with migrating the Voyager union catalog over as the new NZ, while institution catalogs were migrated as is and then linked to the NZ after migration.

As we know from the analysis and work of the title reduction project, the original NZ included a large number of duplicate records, frequently caused by the presence of distinct versions of records in catalogs that reflected different merge history.

Linking between an IZ and the NZ is based on matching of the OCLC System Number, as found in MARC field 035, subfields a or z.

Preparing Records for Linking

Perform a search on records with inventory. Use Physical Titles for records with holdings and items. Use Electronic Titles for records with electronic collections and portfolios.

Use the advanced search options to include specific attributes of records

- Is Linked equals No – Identifies whether the record is linked to the NZ. (Is linked also works with links to the CZ, but CZ linked bibs should also be linked to the NZ.)
- OCLC Control Number (035a) Is Not Empty – Record has an OCLC number in field 035a, in the format (OCoLC)############ or (OCoLC)ocm/ocn/on#########
- Library (Holdings) equals *your main library* and/or *your permanent collection locations*; for physical titles, this is important because you don't want to include records from your Resource Sharing Library; you may be more selective than the library, for instance, excluding reserves locations.
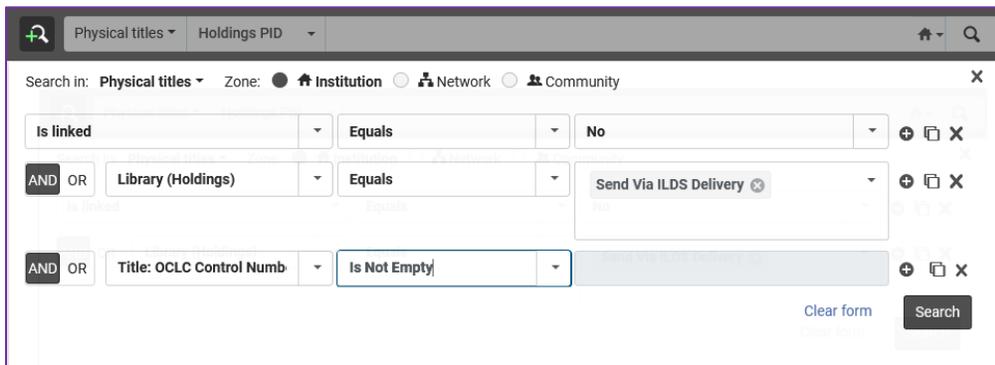
Click Search. After viewing the results, save the query as a logical set by clicking Save and Filter Query.

Create a set name, add other details as needed to document your work. Set Private to "No". Click Save.

This set will appear on the Manage Sets page. The next step is to itemize the set so that you have a measurable set of records to check.

Click the actions menu button, then select Itemize.

Again, enter a set name and documentation for your work. While you can run jobs on logical sets, once you make changes to the records, they might not be findable by the set definition. Meanwhile, an itemized set keeps track of the actual records, so the itemized set can be used after running a job to track the records changed.

Click Submit when ready to save your itemized set. Alma will let you know that the itemized set should have a certain number of members, and it will ask you to proceed. Click Confirm, and Alma will run a job to create the set.

Alma returns you to the Manage Sets page. You will get an email when the job completes, and you can click the Public Sets and My Sets tabs to refresh the list.
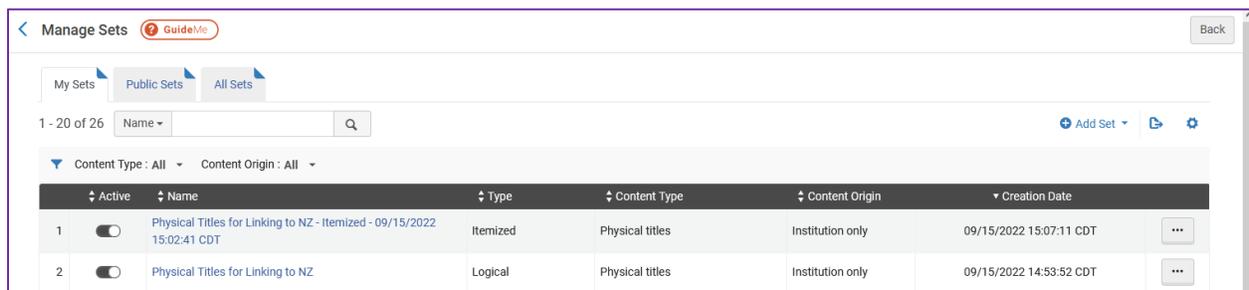
You may view the contents of the set by clicking the actions menu, then selecting Members. While viewing the members of the set, you may choose to remove individual members from the set using the checkboxes and the Remove Selected button. Click Done to close and save the set; click Back to close the set without making changes.

Run the linking job

Alma provides a Link a set of records to the Network Zone job that will use the match method in place to link an IZ record to the Network.

Go to Admin > Manage Jobs and Sets > Run a Job.

Select the Link a set of records to the Network Zone.
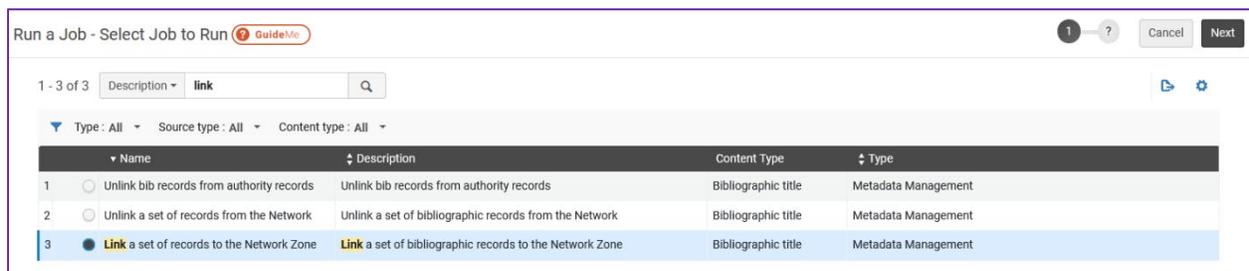
Click Next. Then select the itemized set that you just created.

Click Next. On the third job screen, you'll identify the parameters that Alma uses to process your records. In this job, you'll select the match methods to apply and what to do if the NZ does not have a matching record.

Select "Unique OCLC Identifier Match Method" as the method for both Serial and Non-Serial.

For Upon No Match, tick the box for Contribute IZ records.

On the last screen, you may modify the job name that appears in the list of jobs, whether the running list or the history. You also see a summary of the job conditions; you may want to make a screenshot of this information, as Alma doesn't always include this summary in job reports.

All that remains is to click Submit, at which point Alma identifies that it will perform actions on the members of the set, and it will ask you to continue. Click Confirm to run the job.
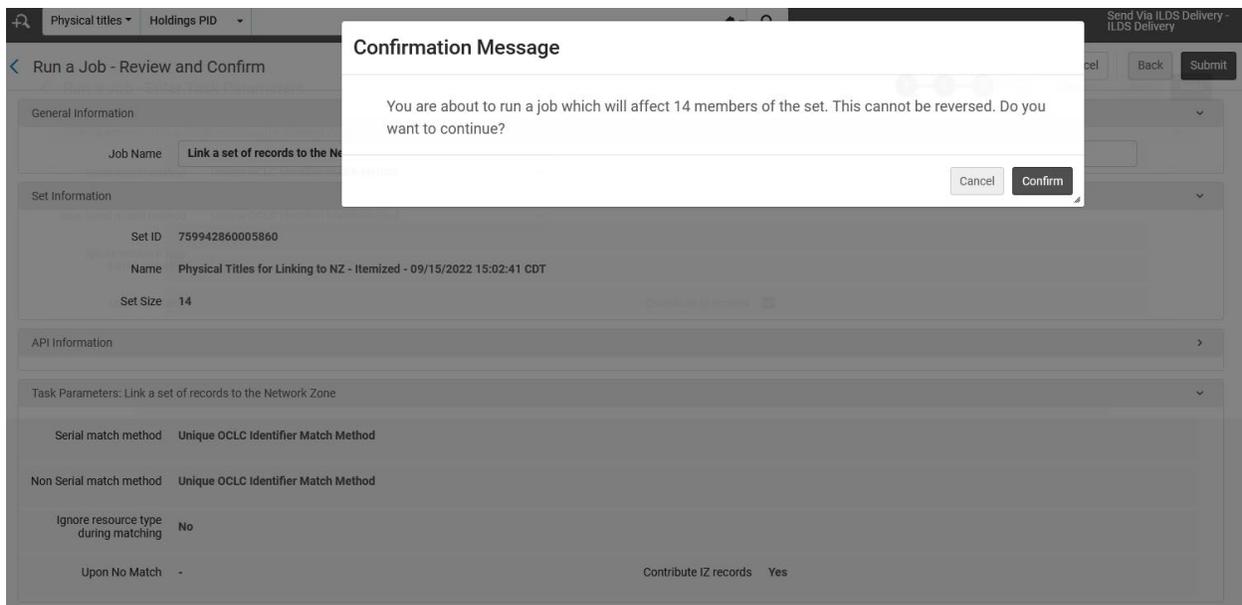
Alma will take you to the Monitor Jobs screen. You may click refresh to follow the progress, or you may wait for an email to let you know the job is done, at which point the job will be listed on the History tab.

The email report is somewhat helpful, in that it summarizes what happened. As noted above, the summary doesn't include the settings that you chose for the job.
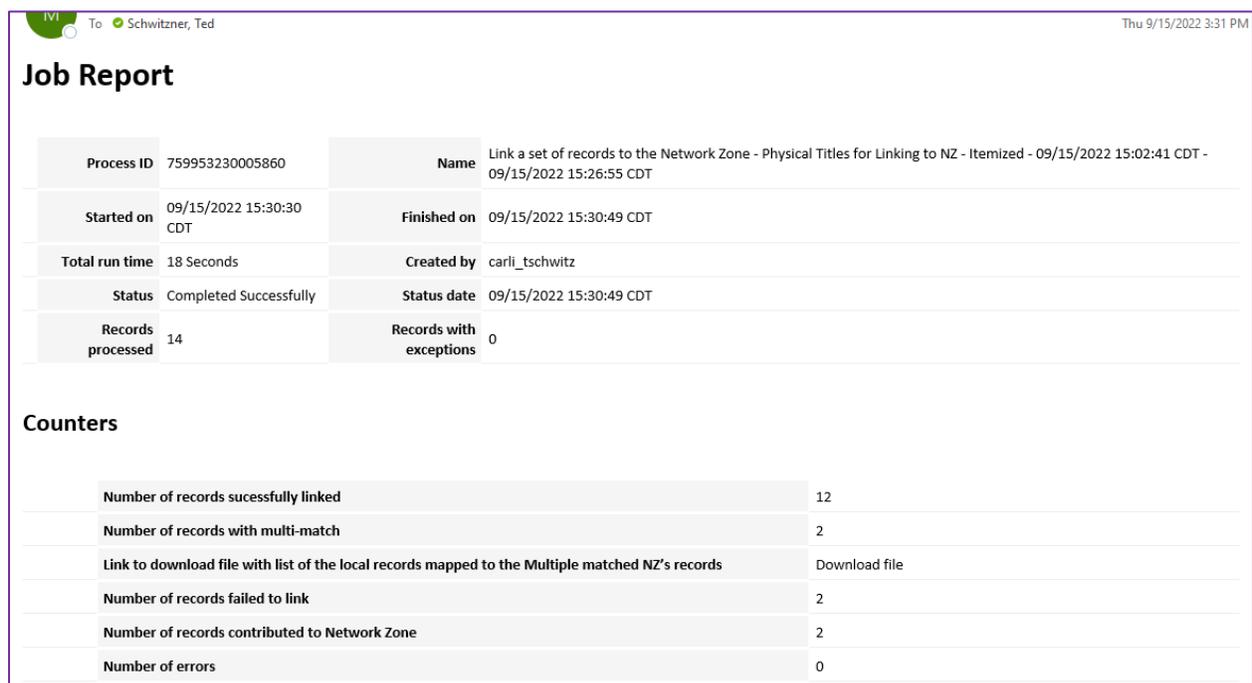
The email shows an option for "Download file," but to get the download, you actually need to go back to the jobs report in Alma.

If you left the Monitor Jobs screen, click Admin > Manage Jobs and Sets > Monitor Jobs, then select the History tab.

Click the actions menu button, then select Report. The job report provides the same information as the email report, with the addition of a couple linked entries.

The job report shows us the number of records successfully linked and those that did not successfully link. The linking job does not know how to automatically resolve multiple matches, but we can get more information on those records from the linked entries. The report also shows how many of the successfully linked records were contributed as new to the NZ. Unfortunately, this is not linked, so we'll have to go back and check our itemized set to be sure.

Finding and resolving multiple matches

Here we can click on the linked count next to "Number of records with multi-match," which shows you the records that were not linked to the NZ as a result of multiple matches.

You might notice that this appears to look like a saved, itemized set. However, it is only saved in the job report; it does not appear on the Manage Sets pages.

We may also click Download file to get the list of records that resulted in multiple matches. This is a plain text file, named with the job id and "_multi_match" but it doesn't start with a .txt extension. Save it to your computer, then open in your preferred text editor. I tend to use Notepad++.
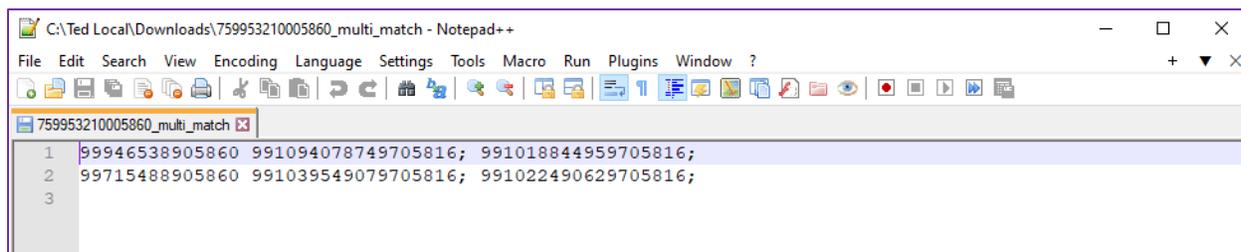
This is not a formatted file with tab or field delimiters, so it might need work before importing into Excel or OpenRefine. Fortunately, our example is short enough to work through manually.

The first column is the MMS ID for our IZ bib record. Any successive columns are the MMS IDs from matching NZ bib records. So, what could you do now?

1. Search the NZ bibs in the metadata editor, and merge the records if appropriate (i.e., if the corresponding WorldCat bibs are also merged).
2. Report the multi-matches to CARLI, and the IHLS Alma Clean-up Team will work on merging these records.
3. Manually link your IZ bib to one of the NZ bibs, when the record gets merged, your holdings will move along with the merged bibs.

Finding records contributed as new to the NZ

To see which records ended up as new contributions to the NZ, we will go back to the itemized set that we used for the linking job. With a small enough list, you could look through the results to find any records that have a Modification Date corresponding to the date and time you ran the linking job.

Here, we have a record that was modified at the same date and time that the linking job ran. The modification date isn't showing us when the record was linked, but when the System last recorded a change to the NZ bibliographic record. Though since this is an institution record list, if anyone saved a change to one of these records in the IZ after this—for instance, adding a local extension for a call number or note, then the IZ modification date and time would take place.

Another way you can check which records were linked is to export your search results to Excel, then take the MMS IDs from that report and use them as input to Analytics.

If your record was contributed to the NZ, give yourself a pat on the back. Thanks for the new record.

Looking at records that were linked to existing NZ records

So, the report and/or itemized sets that you used before can also be used to check how your records were linked to the existing NZ records. This is valuable because when you link your IZ record to the NZ, the NZ record becomes the master record. The record contents are shared to you and other IZs, and only any local extension data will remain.

Generally, this should be a good thing. However, it is possible for your IZ bib to match a single NZ bib that wasn't as up to date as yours. What's the solution here?

Mainly, once you know your record has linked successfully, you also know that you would be able to export a fresh bib copy from Connexion to the NZ. That would ensure that everyone using the bib would have the updated details.

You might ask, "Wait, my record was better or more updated than the other one. Why can't my record replace the existing NZ bib?" The answer is that the NZ accepts the first record in as the master, and

other incoming records matching on the given match method are linked as is. The linking job is not the same as an import profile, which offers options for merging and judging record fullness (or briefness).

If there are additional enhancements from your former IZ bib that you want to share with others, you could look at your record history in the metadata editor, then copy those improvements to the NZ bib, or save them as local extensions as desired.

In the metadata editor, you would go to the View Related Data menu, then select View Versions of Original Record. The metadata editor will open a split screen, and you may select to view previous versions of your record. Then you might select and copy elements from your older version and paste into the active record, if appropriate.

Are there ways to do this better?

Probably. Internally, CARLI has been considering this as a task for the Alma Cleanup Team to make more impactful and visible progress on eliminating duplicate records in the NZ. And since their process includes refreshing the merged bib from WorldCat, we know that members will be getting the updated record copy.