Post-Migration Workflow to Restore Special Collection Bibliographic Records, Set Cataloging Permission Levels, and Optionally Relink to the Network Zone

I. Special Collection Workflow to Restore Voyager Bibliographic Records Replaced During Migration and Set Higher Cataloging Permission Levels

During the Alma migration, I-Share institutions' bibliographic records undergo a matching process with the Network Zone (NZ) records built from the I-Share Union Catalog. When a match of the OCLC number in tag 035 subfield a or z is found, an institution's record links to the NZ record. During linking, the NZ record becomes the record visible for the institution when searching in Alma or Primo VE. When a linked NZ record replaces an institution's original Voyager bibliographic record, the original version can still be viewed through the Alma Metadata Editor Tools- View Versions of Original Record feature. Linking to the NZ record is an ongoing benefit of the shared catalog environment and allows updates to the NZ record to benefit all institutions who have records linked.

Institution and copy-specific local data existing in holdings data is preserved during the migration. Also, institution and copy-specific local data existing in or moved to a bibliographic record's 09X, 59X, 69X, 77X, 78X, and 950-999 field for the migration will transform into local extensions if specified in the migration form as containing local data. Local extensions remain visible only to those affiliated with the institution when a record is linked to the NZ record.

However, institutions with highly specialized bibliographic records containing item and institution-specific data too extensive to be reasonably preserved through local extension fields might experience this data being replaced if matching and linking occurs with a NZ record lacking the item-specific data.

To preserve item and institution-specific data in these highly specialized bibliographic records, an institution can follow the Special Collections workflow described below to restore these records post-migration. In order to take advantage of this workflow, an institution needs to identify any highly-specialized bibliographic records, preferably ahead of the Voyager Technical Services Freeze [insert date]. Then, during the Voyager Technical Services Freeze, they should file an "Other" type Work Request Online with CARLI to request the records be extracted from Voyager. Soon after migration [should we say within X weeks of migration?], an institution would follow steps 1-4 below to restore these records using the original Voyager bibliographic records file and set high cataloging permission levels on the records to add an additional level of protection. Optionally, records with higher cataloging permission levels set could be relinked to the NZ, if it was deemed appropriate to do so.

This process includes the following steps:

Step 0: Prepare two files before you start.
Step 1: Create a Set.
Step 2: Unlink records from the NZ to the IZ.
Step 3: Import and overlay those IZ records with the original Voyager records.

Step 4: Assign a high cataloging permission level to the set.

Step 0: Prepare two files before you start

a. During the Technical Services Freeze, request that CARLI extract the original bibliographic records in Voyager that you wish to preserve through this workflow by filing an "Other" type WRO and sharing an excel or text file of bib ids to extract. The Technical Services Freeze is the best time to extract the bibliographic records since they should not be changing during that period. (For testing small sets ahead of time, Voyager Cataloging client's save the records to a local file functionality is useful for manually extracting records.)

b. From the extracted Voyager record file, create an Excel or text file containing OCLC numbers or 959 Voyager bib ID numbers to use for **Step 1** below. Header types should follow the structure of those identified in *Managing Search Queries and Sets*. MarcEdit's Tab Delimited File option may be useful to compile the control numbers easily for large sets. Contact CARLI at support@carli.illinois.edu if you would like assistance with this step.

Step 1: Create an Itemized set of bibliographic records

Create an Itemized set of records in Alma from the Excel or text file you created in **Step 0b**.
- **Admin > Manage Sets > Add Set > Itemized**
- **Set a descriptive name, content type, and privacy and active status**
- **Upload Excel or text file**
- **Save**

To check the itemized set results and confirm if they are linked to the NZ, return to **Admin > Manage set > select created set > select Members**

Step 2: Unlink records from the NZ to the IZ

Run job **"Unlink a set of records from the Network"**. (Note, this job will not restore original migrated record.)
- **Admin > Run a Job > Unlink a set of records from the Network > Next > Select the set you created in Step 1 > Submit > Confirm**

To confirm records successfully unlinked, return to **Admin > Monitor Jobs > History > Select job to view Job report, select Bibliographic records successfully unlinked > Preview records**. Search them with an NZ query to be sure they unlinked.

Skip to step 3 if you will be matching on OCLC number.

If you will be matching using the 959 bib ID, prepare for step 3 by creating a normalization rule to process this unlinked set.
a. *Create normalization rule:*
   Resources > Open Metadata Editor > File > New > Normalization Rules > Add Name "copy 959a to 035a" and description, shared, enabled; paste in text from "Normalization rule copy 959a to 035a.txt" located in Box.

b. *Add normalization rule to a process:*
Configuration > Resources tab > Metadata Configuration. On Metadata Configuration List – Active
Profiles, click MARC21 Bibliographic > Normalization Processes tab > Add Process. There are 3 tabs:
General tab: add name and description Copy 959a to 035a and status=Active;
Task List tab: Add Task MarcDroolNormalization;
Task Parameters tab: select copy 959a to 035a.

c. *Run Normalization Job:*
Admin > Run a Job > select Marc21 Bib Normalization > select Set from Step 1> review and Submit.

Resources on Normalization: [Working with Normalization Rules](#), [2 Videos](#), and many [examples.](#))

Step 3: Import and overlay records in IZ with original Voyager records

Import the file of Voyager original records from **Step0a** to overlay the unlinked records from **Step 2**.
- Create import profile: **Resources > Manage Import Profile > Add New Profile (or select existing) > Repository**
  - o **Uncheck "Use Network Zone"**
  - o **Set profile name, originating system, physical source format (Binary or XML), status > Next**
  - o **Select match method (OCLC number = Unique OCLC Identifier; 959a moved to 035a= 035 Other System Identifier and include institution's prefix in 959a).**
  - o **Select Match Actions: Automatic handling method, upon match=Overlay**
  - o **Upon no match=Do Not Import**
- Select **Run > Select File** (Voyager original bibs in .dat) **> Submit**

To confirm the records successfully replaced, **View Job Report > Bibliographic Records > Overlaid records.**

Step 4: Assign a high cataloging permission level to the set (ex. Special Formats/Special Collections).

When a high permission level is applied to a set of record, this will prevent users with lower cataloger permission levels from editing the MARC bibliographic data in the records. They will have limited abilities to add new holdings and PO lines, suppress, and view bibliographic record versions and inventory. Only those with the same or higher permission level may edit the bibliographic record.

Run job "Set Bib Records Cataloging Level".

- **Admin > Run a Job > Set Bibliographic Records Cataloging Level > Next >**
  Select the set you created in Step 1 > Select the appropriate Cataloger Level (ex. Special Formats/Special Collections) **> Next > Submit > Confirm**

To confirm the catalog level was assigned, return to **Admin > Manage Sets >** for the set you selected in Step 1, **select the ellipses: Members > Edit record > check Current cataloging level.**

Resource on Cataloging Levels: [Cataloging Privileges](#)

With higher cataloging permission levels set, consider the optional workflow to relink the records to the Network Zone. Relinking to the Network Zone is not required. Unlinked resources in your Institution Zone are discoverable through Primo VE's All I-Share Libraries search.

II. Optional: Relink Bibliographic Records to the Network Zone

The successful outcome of this process will link bibliographic records from the Institution Zone to the Network Zone.

Step 0: Prepare a file or query IZ to identify records.
Step 1: Create an Itemized Set.
Step 2: Link records in the IZ to the NZ.

Step 0: Prepare a file or query IZ to identify records.
Step 1: Create a Set.   Create a set of records in your Institution Zone to link to the Network Zone.   • **If uploading a file: Admin > Manage Sets > Add Set > Itemized** or   **If creating a set from an Alma search query, select Save Query to create a set**   • **Set a descriptive name, content type, and privacy and active status**   • **Upload Excel or text file if creating a set from a file**   • **Save**   To check the set results and confirm if they are linked to the NZ, return to **Admin > Manage set > select created set > select Members**

Step 2: Link records in the IZ to the NZ.
 	
 a. Identify your matching parameter (view options or view video)
 	
 b. Run job **"Link a Set of Records to the Network Zone"**
     • **Admin > Run a Job > select "Link a set of records to the Network Zone"**
     • **Select Set, select match method, unselect Ignore resource type during matching** (selecting causes the serial and non-serial match method parameters to be ignored), **Contribute IZ records=Yes** (non-matches will be contributed to the NZ)
 	
 To check the results of the job, return to **Admin > Monitor Jobs > History > Select job > Report.** Confirm the records linked according to the report, then check linked record in Alma through a search to confirm.

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