

Chat for February 17, 2021

09:15:17 From Jen Masciadrelli, CARLI (she/her) : https://www.carli.illinois.edu/products-services/i-share/physical-res-man/auth_control

09:16:02 From Ted Schwitzner, CARLI (he/him/his) : https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Authorities

09:17:25 From Tami Luedtke : Basic question here: How or where do we see the Publishing to Primo profile? Trying to figure out what the settings for that are and can't seem to find it

09:20:55 From Bill Schultz : I think it's resources --Publishing-- publishing profiles...

09:21:19 From Tami Luedtke : Good to know. Worried I wasn't quite awake enough

09:22:18 From Joan Schuitema : I would just like to mention that I am appreciative of the quality of CARLI staff trainers!

09:22:54 From Jessica Grzegorski : Non-preferred 4XX terms do appear to be searchable in Primo by keyword or Advanced Search under "Creator" (and by searching Authorities in CZ in Alma). Do you know if this is truly the case?

09:25:49 From Jessica Grzegorski : I wasn't sure if that had to be enabled by the Publishing profile that Yoel mentioned.

09:25:57 From George Woolsey : He mentioned the F3 and F8 keys to check headings ... can you comment or elaborate?

09:26:18 From Jessica Grzegorski : Great, thanks, Jessica, good news!

09:27:33 From Joan Schuitema : So, there are no visible "see" or "see also", right?

09:27:47 From Jessica Gibson (CARLI) : &showPnx=true

09:28:35 From Jessica Grzegorski : Yes, unfortunate that "see" and "see also" aren't more visible and transparent

09:30:31 From constance.k.lee : I looked at the scheduled jobs and see that the Preferred Term Correction job is not active and I can't turn it on.

09:31:59 From Tami Luedtke : I can see that we don't have the job for replacing with preferred terms he referred to on or scheduled. So am trying to figure out the pros/cons of turning that on at this point.

09:33:22 From George Woolsey : He said F3 actually flips the heading if there is a 4XX in the AR.

09:33:58 From George Woolsey : Haven't tried it at all--

09:34:06 From Joan Schuitema : My function keys don't seem to work at home, but maybe that's just me. Works fine in the office

09:35:36 From George Woolsey : Unfortunately, some bibs I make have headings that match a 4XX but to the wrong entity (person, author, etc.)

09:37:13 From Tami Luedtke : Thanks Ted. That's good to know!

09:37:55 From constance.k.lee : Okay. Thanks. Seems like off is good.

09:40:50 From Tammie Busch : Is there a NZ level job that updates authorities?

09:41:47 From Joan Schuitema : We have been changing headings in a record we use in the NZ, but haven't touched other records for corrections at this point. Waiting for direction on that, but anything we use or bring in...the headings are correct as of that day.

09:41:51 From Gail Heideman - Greenville University : Will authorities only live in the CZ and the IZ? or will we have NZ authorities?

09:41:57 From Tammie Busch : How do dates get updated in authorities at the NZ level?

09:43:07 From George Woolsey : From where I sit, updated headings must be made in OCLC first, then the headings can be updated in our NZ--right? There was an instance where an undifferentiated name had been upgraded to a more specific heading in some OCLC records but not others. So, should we report to you the cases where this happens with MMSIDs, etc.?

09:43:25 From constance.k.lee : Is there a report that can be run like we had with Voyager on authorities that might need to be changed?

09:43:39 From Tammie Busch : Yep, I missed that. That answers my question. Thanks!

09:44:44 From Tammie Busch : So if the CZ authority is updated and the NZ record is linked, the access point in the NZ record will be updated.

09:47:51 From Joan Schuitema : I would be in favor of shared authority control on the NZ. That would not only make for consistency, but would really save time.

09:48:14 From Tami Luedtke : I know we have been talking about more ethical and inclusive terms, which seems to lead back to some sort of local authority project whether at the IZ or NZ. But I know we would be interested if that was something others were also thinking about

09:48:16 From Lori Murphy : Agreed.

09:49:11 From Tammie Busch : Definitely interested!

09:49:28 From gporter : Authority control in NZ would be helpful especially to smaller libraries with not enough staff...

09:50:05 From Megan Kelly : How would shared authority control in the NZ impact (or not) records in the IZ not linked to the NZ?

09:50:39 From Joan Schuitema : We should bring that up during the Local authorities discussion ExLibris would bring up. We could either make a local directory for shared local headings, or use local fields in bibs....or???

09:51:06 From constance.k.lee : Is there a report that can be run like we had with Voyager on authorities that might need to be changed?

09:51:16 From Joan Schuitema : Can we also bring over the genre terms, etc and have them update bibs in the NZ too?

09:52:02 From Tammie Busch : Oh! That stinks!

09:56:18 From Joan Schuitema : Re: George's question....could the TS Committee take that up? A computer can't make those kind of distinctions. Maybe TSC could take it on....or we would have to wait for corrected bibs to come out (NACO folks have to submit record corrections when they fix an undifferentiated name...

09:57:34 From Joan Schuitema : A CARLI NACO library might take that on?

09:58:20 From Joan Schuitema : That would be cool!!!!

09:58:40 From Renata Schneider : I love the idea!

10:00:50 From Tammie Busch : Thanks for sending that out!

10:01:17 From Alice Creason : I love these discussions. So helpful to connect with our colleagues and CARLI.

10:01:50 From George Woolsey : I'd really be glad to see a system of See and See Also's in place in our system (an old term, Syndetic structure)

10:02:03 From Sylvia P : Thank you!

10:02:09 From Tami Luedtke : Thanks!

10:02:09 From Jessica Grzegorski : Thanks, CARLI!

10:02:13 From constance.k.lee : Thanks.

10:02:16 From alisha : Thank you

Chat for February 23, 2021

09:21:50 From Bill S : I liked the 670 field idea he mentioned...and 040

09:22:11 From Brent Eckert : Can you please explain why we are not using the "update preferred terms" job? I thought one valuable feature of Alma is that it will automatically update terms in bib records when the preferred term is changed.

09:24:37 From Jessica Grzegorski : I don't think it would be best practice to copy a LC or LCSH over and modify it locally and still call it LC or LCSH. I think it would be better to save to a completely local vocabulary. Perhaps add a 670 to mention it was originally copied from LCSH, etc.

09:26:23 From Brent Eckert : So, do we need to continue manually updating bibs when authorities change, like we did with Voyager? I had quit doing that because I thought Alma did it automatically? (How) are our bibs being kept up-to-date?

09:26:50 From Brent Eckert : Sorry if this was discussed last week. I missed that session.

09:33:31 From Brent Eckert : Would it be best practice to create local authorities routinely for situations where it is unlikely that LC will ever create an authority record (for example, for local authors)? Or only if we feel there is a need for a cross-reference?

09:34:58 From Bill S : If possible, can you briefly explain what Yoel was doing when he "published" and ran a job in the context of creating an authority?

09:38:43 From Jessica Grzegorski : Is the publishing job a Primo thing?

09:38:51 From Bill S : :) Thought that might be beyond needs right now. Thanks!

09:39:07 From Brent Eckert : What are other I-Share libraries' practices? Do you create local name authority records for every local author?

09:39:45 From Jen Masciadrelli, CARLI (she/her) :
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/090Integrations_with_External_Systems/030Resource_Management/100Publishing_to_Primo_and_Primo_Central](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/090Integrations_with_External_Systems/030Resource_Management/100Publishing_to_Primo_and_Primo_Central)

09:43:31 From Jessica Grzegorski : Since becoming a NACO library, we don't create local name authorities. We just contribute to LC NAF.

09:44:05 From Joan Schuitema : We used to use them for series that we needed to establish tracing practices for prior to LC headings coming out.....but that was before LC started tracing pretty much everything.

09:44:46 From Jessica Grzegorski : We are considering creating local subject headings, though. Would be interested to hear if others are doing this.

09:45:27 From Ted Schwitzner, CARLI (he/him/his) to burmaa(Privately) : Burmaa, would you like to talk about JKM's practices?

09:45:38 From Bill S : I can see us doing some of that for sure...

09:45:53 From Bill S : Especially now after seeing the session...

09:46:04 From George Woolsey : At Elmhurst we have a local "pattern" heading arranging selected terms based on local user manuals, for example, our "Textbook collection" pattern headings.

09:47:46 From Brent Eckert : I've created name authority records for our own faculty/employees who don't already have LC authority records. But I haven't created them for every local author I've encountered. I'd be very interested in a NACO funnel.

09:48:21 From Jessica Grzegorski : Has CARLI considered hiding terms like "Illegal aliens" and displaying something else instead using normalization rules, like this SUNY project?
<https://slcny.libguides.com/c.php?g=986218&p=7623203>

09:49:48 From burmaa to Ted Schwitzner, CARLI (he/him/his)(Privately) : I'm an ACQ person at JKM. I do copy cataloging. Still, I want to know how authority records work on Alma.

09:50:34 From Jessica Grzegorski : Fair enough :)

09:51:25 From George Woolsey : When I assign one of these "Textbook" terms, the local directions explain which "kinds" of terms to select and how to arrange them (subdivisions, etc.). Not sure that headings could be "established" via individual authority records.

09:52:21 From Jessica Grzegorski : We are thinking of display norm rules for outdated/offensive LSCH terms for Indigenous materials

09:52:56 From George Woolsey : Each time a Textbook collection heading is used, we use as a "Local extension" visible only at Elmhurst.

09:55:00 From Ted Schwitzner, CARLI (he/him/his) to burmaa(Privately) : Okay thanks.

09:55:20 From George Woolsey : One thing that Voyager was so great at is that a display could be generated at the Pattern of previous usage of local headings (sigh)

09:57:13 From Jessica Grzegorski : I would be interested in testing local authorities in IZ

09:57:32 From Megan Kelly : Yes

09:57:36 From Alice Creason : Yes, I think it's a worthwhile project.

09:57:45 From Joan Schuitema : I think it would be worth looking at and I bet we would have someone willing to participate

09:57:56 From Renata Schneider : I like the idea of using normalization rules for display of certain headings and using local headings for others.

09:58:44 From Jessica Grzegorski : +1 Renata

09:59:24 From George Woolsey : I'll check with Elaine to see if normalization rules can be applied to our Textbook headings, or whether it's worth it.

09:59:28 From Bill S to Ted Schwitzner, CARLI (he/him/his)(Privately) : I'm very interested in local authorities, Don't know how much I can commit to participate. Not as interested in normalization based on your warnings...

09:59:51 From Jessica Grzegorski : Thanks, Ted and Jen!

Chat for March 10, 2021

00:10:37 Ted Schwitzner, CARLI (he/him/his):
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Metadata_Management/060Working_with_Authority_Records/010Using_the_Authority_Control_Task_List](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Metadata_Management/060Working_with_Authority_Records/010Using_the_Authority_Control_Task_List)

00:15:12 Alice Creason: I looked at our authority control task list after the webinar and found that all but 5 of the issues reported were in CZ records, not our physical inventory records. Is there really anything we can or should do about authority issues in CZ records?

00:21:42 Ted Schwitzner, CARLI (he/him/his): <https://www.youtube.com/watch?v=BgQam-QxyAo>

00:21:45 Jen Masciadrelli, CARLI (she/her):
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/070Contributing_to_the_Community_Zone_%E2%80%93_Bibliographic_Records#Editing_Community_Zone_Bibliographic_Records](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/070Contributing_to_the_Community_Zone_%E2%80%93_Bibliographic_Records#Editing_Community_Zone_Bibliographic_Records)

00:23:15 Jen Masciadrelli, CARLI (she/her):
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/060Community_Zone_Contribution_Guidelines](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/060Community_Zone_Contribution_Guidelines)

00:25:40 Jodi Craiglow: Are the recordings for those sessions online? I didn't even realize they were offering that series.

00:26:16 Jen Masciadrelli, CARLI (she/her):
https://knowledge.exlibrisgroup.com/Alma/Training/Extended_Training/Presentations_and_Documents_-_Authorities

00:26:35 Jodi Craiglow: Fabulous -- thanks!

00:26:36 Liz : You can also go to Youtube and type in Ex libris ltd. Then you can watch them under Authorities in Alma.

00:27:00 Gail Heideman: So, I am looking at a record in my Authority Task list and when I opened the record and looked at the location it is a Resource Sharing Record

00:39:34 Brent Eckert: So, an authority record can exist in the IZ or NZ or CZ? Or any combination of the three?

00:41:55 Brent Eckert: Are there currently any authority records in our NZ? And there are only ones in our IZ if we have created a local authority record?

00:44:46 Denise Green: Like editing terms related to immigration or Native Americans?

00:46:02 Jessica Grzegorski: Yes, we're hoping to do that at Newberry

00:47:34 Brent Eckert: How frequently are new and updated authorities added to the CZ?

00:49:39 Jen Masciadrelli, CARLI (she/her):
[https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Metadata_Management/060Working_with_Authority_Records](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Metadata_Management/060Working_with_Authority_Records)

00:49:48 Brent Eckert: Thanks

00:50:23 Mingyan Li: Thanks!