

## Migration Process

There are two parts to the migration process when your topology includes a Network Zone.

1. Data from each individual college and/or district, again depending upon the topology that was determined, is migrated to your Alma institution zone.

2. **Bibliographic Data Only** from all institutions is linked to the network zone. There are two ways of doing this.

A. CCC provides a load order, telling us which institutions should be loaded in which order. All the records in the first institution are loaded. When the second institution is linked, any records they have with the same OCLC number as a record that has already been loaded in LINKED to that record – and that is the bibliographic data you see in your institution zone. Any records that do not have a match in the network zone is LOADED.

As such, you will see records in which all of your current data is retained, because you were the first institution with that specific record that was loaded. You will also see records where there may be loss of data, because the version of the record that was loaded first did not have the customizations you added to your record.

B. CCC provides a file of records; typically this will come from OCLC. This would then be the master OCLC record, and any customizations will not be present. Any records that are not in the master OCLC file, i.e. records that are truly local, will have migrated to your institution zone in step one, but will not be linked to the network zone.

## Local Fields

Local bib extensions can only be added to 59X, 69X, 77X, and 9XX fields. A subfield 9|LOCAL must be added to these records, and it needs to be done prior to the start of the migration. It can be omitted for test load, given the tight schedule, but should be part of the data preparation planning for cutover. Fields cannot be localized after the migration. Any data you want to retain from non-local fields, i.e. 246 fields and 650 fields, must be moved to a local field and the 9|LOCAL subfield indicator added in order to retain it.

We can only speak to how it might be done using Voyager tools – Non Ex Libris ILSes may have their own tools to assist. In Voyager, you would utilize Global Update to investigate this. Ideally, any local information you have would have some marker to note that it is not part of the master record; this marker would allow you to differentiate. Otherwise, this task becomes much more difficult, because there is little in the way of data to allow you to separate your local fields out from the non-local fields.

In Alma, these records could be located using indication rules – which allow you to create a set

based upon the presence of certain fields and certain strings within those fields. This would again be aided by a marker identifying these as local.

If there is no way to identify these additional fields as local, then you will need to discuss either copying ALL instances of these fields to a local field for retention or none of them. The ability to identify them is key.

#### Logistical considerations

In terms of whether any of this can be facilitated by Ex Libris working with individual libraries, in general this is an internal project for CCC. Ex Libris can advise, but policies and specific data projects prior to the migration need to be facilitated by the working group.

#### Enhancements

Typically all enhancements must go through the Ex Libris Ideas Exchange. Certainly we liaise with our product management team as required, and certainly we can do so if needed on this topic – but enhancements to how the institution and network zones interact will likely be complex and would not be able to be completed prior to your cutover in the fall of 2019. When we make changes like this we need to ensure that they don't have far-reaching ill effects, and that process can take time. We appreciate your understanding.

2. What is the data structure that links those local bib extensions fields in IZ to the NZ records? Just thinking ahead to the next migration to the next new system (totally theoretical, but worth a thought) – how would we “re-attach” these local fields to the main bib record, should we need to export our records out of Alma? This is less of a concern than the points above, but any details they have about this would be welcome.

**Ex Libris:** When records are linked to the network zone, whether during migration or when new records are added post-migration, the record is added to the network environment sans local fields; local fields are appended to the institution zone copy of the record. Upon export, the record will be the master network zone record with the local fields appended for each individual institution.

If more details about the data structure are required, then we will liaise with our development team for further information.

3. How should records for eResources handled? Particularly for owned vs. subscription titles? Let's say a library subscribes to EBSCO's subscription ebook collection. Are the record sets loaded at the NZ? If so, what happens if a library buys a copy of one of the ebooks, that is later dropped from the subscription collection? Would they add the record to their IZ? Or, if EBSCO drops a title that none of us has purchased separately. This is maybe more a question for us than for Ex Libris, but are we going to maintain MARC records for titles that might be ephemeral (i.e., part of a collection over which we have

no control)?

**Ex Libris:** Just as with physical resources, all e-resources are migrated to the institution zone and then linked to the network zone based on the presence of the OCLC number.

If a library buys a copy of an e-book that is dropped from a subscription collection, they will create a local portfolio for that e-book and it will be retained in your repository. This is done at the institution zone.

You're correct that data maintenance policies is more of a consortial decision, but we can discuss today.

4. What will happen with copy numbers on records with multiple copies some of them missing because that item was deleted. Will the exact copy numbers be retained or will they be renumbered?

**Ex Libris:** Copy numbers are item level data and will be migrated to and retained at the institution zone level. How and where it migrates to is source ILS dependent, and should be in the ILS migration guides.

5. Scenario: If a library has a large DVD collection and has locally added closed-captioning or SDH information to the 546 field because it is not consistently added in WorldCat, will that information be lost? This is an important field for California Community College libraries who purchase DVDs, but this specific library does not have the authority to add this on OCLC so it is only added locally. Is there a way for this library to save the 546 field information so it is not lost in the overlay? How would this library prevent this information from being lost every time the master record is refreshed?

**Ex Libris:** As discussed in the first question, this data would have to be copied to a local field such as 596 and 9|LOCAL would need to be added to that field.

6. Can you explain more about how "bound-withs" work and why these types of records should not reside in the NZ? According to Orbis Cascade and the CSUs, they provide confusing displays in Primo, but I'm not sure I understand this completely.

**Ex Libris:** Community colleges rarely have extensive collections of bound-withs, as they are more typical in historical and legal collections.

Having said that, bound-withs are different titles that are bound together. Typical examples I've seen are different papers written in the same collection, i.e. a historical collection of Thomas Payne's pamphlets, with separate titles. Using bound-withs allows you to see in Primo that there are related titles.

Due to the inherent uniqueness of said titles, these often are better managed at the institution zone.

7. When do we need to let EXL know which local fields we want to keep in order to populate the Network Zone? (referencing page 37 of Amanda's PowerPoint called "Alma Collaborative Networks")

**Ex Libris:** Local fields need to be defined in your source ILS prior to migration.