# Cataloging: Migration of Local Data

Definitions:

- **Local data** = Data in a record that is pertinent only to the institution cataloging the record.
- **Local fields** = MARC fields that are used for local data, such as 090, 590, 690, 9xx, etc.
- **Data enhancements** = Data about a resource that is not specific to a particular institution, for example, table of contents, summaries, and subject headings.
- **Non-local fields** = MARC fields such as 505, 520, 650 that contain data that is not specific to a particular institution.
- **Bibliographic extension fields** = MARC fields in a specific range (see below) that are provided by ExLibris for the purpose of storing local data. These fields are stored in the Institution Zone (IZ). Display, display labels, and indexing of these fields are controlled at an institutional level.

## Local data in local fields

Local data is data that is particular to your library only, and that is intended to be stored in true local fields such as 090 for local call number, 590 for local notes, 69x for local subjects. This data is not appropriate to have in the master record in OCLC, nor should it be in the Network Zone (NZ) in Alma.

In Alma, this local data will be stored in local bibliographic extension fields in your Institution Zone (IZ). This will prevent the data from being overlayed when the record in the NZ is refreshed from OCLC.

The IZ record will link to the NZ record (providing that the record is one that is in the NZ), and Primo VE will display both the NZ record, along with the fields from the IZ that you have configured to display. Only your library will see the data in your local bibliographic extension fields (i.e., this data is not shared with other libraries' Primo VEs).

Bibliographic extension fields are limited to a specific range of fields, as defined by ExLibris:

- 09x, 59x, 69x, 77x -78x and 950 - 999 ranges only
- 900-949 are used by migration during the implementation project
- After Go Live, entire 9XX range can be used

In an effort to create a consortial cataloging standard, and following the example of the CSUs, the Cataloging Work Group has defined a list of local fields to be used as local extensions and a mapping of local fields for migration of local bibliographic data.This document reflects the responses to the *Local fields/Data Enhancements Survey*, which was sent out to LSP project leads in April.

In order to retain your local data in Alma, you will need to move all local data you wish to migrate into these bibliographic extension fields and mark them ǂ9LOCAL. The symbol is the subfield delimiter, which will vary depending on your ILS.

Note: Your migrated data in Alma will use a double dollar sign $$ as the subfield delimiter.

For example:

| | |
|---|---|
| 590 | ǂa Library has discs 2, 3, and 4 only (disc 1 missing). ǂ9LOCAL |

ExLibris does not provide support for this. Each library is responsible for doing this work to their records in their ILS before cutover, which is currently set for sometime in October. To do this, you will need to use MarcEdit, or another global data change tool that is compatible with your ILS.

### Special note about Voyager libraries

The exception is Voyager libraries who answered this question on their migration form (in the Questionnaire tab): “Specify bib tags which will be marked as local, for Alma consortial environments.” For those fields (provided they are bibliographic extension fields as defined by ExLibris), you do *not* need to mark them ‡9LOCAL.

Use the chart at the end of this document to map your local fields to bibliographic extension fields.

Special note about call numbers in the bibliographic record

- Call number fields from the bibliographic record (example, 090 field), do not need to be marked ‡9LOCAL. This data should be present in the holding record post-migration.

### Special note about data in holdings and item records

- Data in the holdings and item level does not need to be marked with ‡9LOCAL.
- If you are a Voyager library, all data in the holdings and item record will be migrated (assuming it was included in your data extract, which was determined by the migration form that your library completed).
- For non-Voyager ILSes, all data in holding and item records can be migrated. The fields that the data is migrated to is determined by the field mapping form or the data validation tool.

## Local data in non-local fields

If you have added local data to non-local fields in your ILS, for example, adding notes about donations in a 500 field, you will need to identify which records you have added these fields to, so that you can isolate those fields in those records only and move them to the appropriate bibliographic extension fields. See the section *Process for identifying local data entered in non-local fields, i.e, non-local data* below.

## Data enhancement in non-local fields

The responses to the *Local fields/Data Enhancements Survey* indicate that some libraries have been adding non-local data to non-local fields such as 505s, 520s, and 650s, to records in their local ILS, but not adding it to the master record in OCLC. Migrating data from these non-local fields is more difficult, because unless you can identify exactly which records you added these fields to, there is no way to distinguish between those fields which you’ve added, and those which were/are already in the record when you imported from OCLC or another external source. That is, there is no way to distinguish between the 650 *you* added to a record and the 650 which is already in the OCLC record, for example.

### Process for identifying local data entered in non-local fields, i.e, non-local data:

If you can identify which records you have added those fields to, the work will be easier. The CSUs provided these instructions for finding local data entered in non-local fields:

- Find fields that contain specific words or phrases that denote a local field that does not use one of the standard local fields, e.g., 500 notes with ‘restricted’ or ‘gift’ or ‘SIMPLIFIED EDITION FOR ESL

STUDENTS''. Other common fields might be local collection names in 7XX added entries or local form/genre headings.

- Find fields that contain specific coding (indicators; or, subfield $2 local) that denote local data and map field to corresponding bibliographic extension field. Example: move 655 $2 local in your ILS to a 694 field.

When you have identified these fields, move them to a bibliographic extension field (the "Alma field" in this document), and tag them with ǂ9LOCAL (Voyager libraries, see *Special note about Voyager libraries* above).

### If you can't identify which records you've added non-local data to:

If you cannot identify which records you've added non-local data in non-local fields to, you'd have to take *all* of the fields of that kind (all 505s, all 650s, for example), and move them into local bibliographic extension fields. This will require an extensive amount of work and may be unwieldy to maintain.

Some things to consider:

*ExLibris recommendations*

- Technically, ExLibris intends local bibliographic extension fields to be used for data that is truly local, i.e., not this type of non-local data. The rationale is that local information should be limited to information that you plan to maintain at the college level.
- Ideally, this type of non-local data would be added to the master record in OCLC. **If you have a small number of records that contain data enhancements in your ILS that are not in OCLC, consider if it is possible for you to add that data to OCLC. That is the cleanest solution.** However, if adding this data to the master record in OCLC is too labor intensive, but migrating this data is crucial for you, local bibliographic extension fields are an option.

*505s, 520s*

- You can move this data to 59x fields. However, you may be duplicating 505s and 520s that have since been added to the OCLC master record. For example, 10 years ago a record in OCLC may not have had the TOC (505 field), so you added it manually in your local ILS. But since then, somebody else has added the TOC to the OCLC record. It is a strong possibility (for non-rare or non-unique items) that 505s and 520s have since been added to the master record in OCLC, and that by doing nothing to migrate your 520s and 505s, you will gain a lot of this data just by the simple act of accepting the NZ record (which comes from OCLC).

- When the CSUs migrated to Alma, they ran an analysis of 50,000 bib records from the CSUs, and compared the ILS data to the OCLC data, and only a very small percentage of ILS records had data (505s, 520s) that wasn't already in the OCLC record.
    - Out of 50,000 records, only 175 records had a 505 in the ILS record that wasn't in the OCLC record (.4%).
    - Out of 50,000 records, 12,114 records had a 505 in OCLC that wasn't in the ILS data (24.2%).
    - Out of 50,000 records, 37,711 records had a 505 in both the ILS and the OCLC record (75.4%) [This data was compiled by the CSUs and used here with permission].

- If you do decide to move all of your 505s (or 520s, etc.) to local bibliographic extension fields, for example the 591 field, then you run the risk of the OCLC record having been updated with a 505, and now you have duplicate 505s displaying in your Primo VE, because one is coming from the IZ and one is coming from the NZ. A solution would be to write a "normalization rule" in Primo VE that says

something like *IF there is a 505 in the NZ record, THEN suppress the 591 in the IZ from displaying in Primo VE*[1]. You would need to work with ExLibris to do this.

*546s, 586s*

- You can move this data to a 59x field. As with the 505s and 520s, there is a chance you will duplicate a 546 or 586 already present in an NZ record.

*65xs*

- The 65x fields are uniquely challenging. You could move them all to 69x bibliographic extension fields, which are searchable, but they don't have authority control. So if you want to maintain the validity of these headings (i.e., if you are using LCSH), you would need to maintain your own authority control on these fields, thereby not taking advantage of the automatic authority control that happens to 65x fields in records in the NZ.
- You will also face the problem of duplicative data described above, i.e., the 65x field that you moved to a 69x field in your IZ is the same 65x field that is in NZ (because it is in the master record in OCLC). So now you have the same subject heading displaying twice (one coming from the IZ, one coming from the NZ), in your Primo VE. You could perhaps write a normalization rule to prevent duplicative subject headings from displaying in Primo VE, but you'd have to work with ExLibris to do so[2].

*If none of your data enhancements are in OCLC vs if some of it is, some of it isn't*

- Israel Yanez from Los Rios Community College District has created a document describing how to identify WorldCat records that lack data enhancements
- The document is written for Sierra ILS, but can be adapted for use by other ILSs
- This document is only helpful if #1 you use OCLC (currently have access to OCLC Connexion, and your records have OCLC #s in them), and #2 if you only need to identify the exceptional/unusual cases where the OCLC record wasn't updated with the data enhancements that you added to your ILS. It is not useful for libraries that have consistently not added their data enhancements to OCLC.

[1] The rule would look like this: rule "Primo VE - Lds02" when MARC is "591"."a" AND NOT MARC."505" has any "a" then create pnx."display"."lds02" with MARC "591"."a"

[2] You can write normalization rules with syntax like "If 691 contains "text" then" but you would need to write it in a way to capture all possible local subject heading fields.

# Migration of Local Data to Local Bibliographic Extension Fields

[Adapted from CSUs]

The table below represents the standard that the LSP Governance Committee recommends to be used in migrating local data. All fields would be indexed and searchable in Alma. Display, indexing, and labeling of the fields in Primo VE is controlled at an institutional level.

The list below contains examples of local field tags in existing records (**Pre-Alma** column); the local extension tag (**Alma** column), the standard MARC tag the field is intended as an equivalent to (**MARC Field**), the name of the bibliographic local extension field (**Description**).

| Pre-Alma | Alma | MARC Field | Description |
|---|---|---|---|
| 037 | 958 | 037 | Source of acquisition |
| 09X | 09X | 09X | Local call numbers *[See note below about call numbers]* |
| 500*, 590, 598, 599 | 590-599 | 500 | Local institution-defined note (can be configured as internal or display) |
| 690, 650* | 690 | 650 | Local–Topical Term |
| 691, 651* | 691 | 651 | Local–Geographic Name |
| 653 | 693 | 653 | Local uncontrolled index term |
| 655 $2 local | 694 | 655 | Local Form/Genre |
| 696, 600* | 696 | 600 | Local Subject Added Entry–Personal Name |
| 697, 610* | 697 | 610 | Local Subject Added Entry–Corporate Name |
| 698, 611* | 698 | 611 | Local Subject Added Entry–Meeting Name |
| 699, 630* | 699 | 630 | Local Subject Added Entry–Uniform Title |
| 700*, 790, 796 | 951 | 700 | Local Added Entry–Personal Name |
| 710*, 791, 797 | 952 | 710 | Local Added Entry–Corporate Name |
| 711*, 792, 798 | 953 | 711 | Local Added Entry–Meeting Name |
| 730*, 799 | 954 | 730 | Local Added Entry-Uniform Title |
| 246* | 956 | 246 | Local Added Entry–Varying Form of Title |
| 740* | 957 | 740 | Local Added Entry–Uncontrolled Related/Analytical Title |
| 440, 490, 830* | 960 | 830 | Local Series Added Entry–Uniform Title |
| | 900-925 | | Do not use. Do not put data in the 900-949 fields, as these are reserved for ExLibris during migration. Post-migration, the 900-925 fields will be reserved for consortial/system use only. |
| | 926-950 | | Do not put data in these fields until after post-Go Live. After migration, these fields can be used for local institution-defined notes, in addition to the 961-999 fields. |
| | 961-999 | | Use these fields for local institution-defined notes. These fields can be configured to show internally or to display in Primo VE. |

*If local data in these non-local data fields can be identified, then data can be migrated to the proposed fields. See the "Non-local Data" section in this document.

*Special note about call numbers in the bibliographic record*:

Call number fields from the bibliographic record (example, 090 field), do not need to be marked ‡9LOCAL. This data should be present in the holding record post-migration.