

Overlaying Bibliographic Records in Alma NZ: Procedures

Background


Procedures outline detailed steps for overlaying bibliographic records in Alma. To be used in conjunction with the policy “Overlaying Bibliographic Records in Alma.”

Procedures

Searching

Catalogers must search for a title in both the IZ and the NZ tabs. The goal is to determine whether there is a bib record in one, in the other, or in both zones.

For the IZ, you may search by any convenient data element. The NZ icon next to a title shows that the bib record is already in the NZ and linked.

1  [Chomsky : ideas and Ideals / Neil Smith.](#)

Book (Book - Physical) text; unmediated; volume By Smith, N. V. (New York : Cambridge University Press 2004.)

Language: English MMS ID: 99736193605264

Subject: Chomsky, Noam,--(1928- ...) Chomsky, Noam. Linguistics. and others ISBN: 052183788X and others

Creation Date: 11/04/2019 24:42:41 PST Record number: 54073866-01caccl_scccd

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Edition: 2nd ed.

Physical (1) Electronic Digital Other details

It is important to click on the NZ tab to see the results in the NZ (to avoid adding duplicate records).

For the NZ, the most accurate method is to search by OCLC number. You need to know if the WorldCat record you intend to add to Alma is already there, i.e., does another CCC library have holdings on this? However, there are also brief records in the NZ which may lack an OCLC number, so a thorough search of the NZ means using additional search keys beyond the OCLC number such as title or ISBN. If there are multiple records in the NZ for the same manifestation, you should use the best record available in the NZ (even if brief).

- When you find your title only in the IZ or only in the NZ, use the procedure for “One Bib in Alma”.
- When you find the title separately in both zones (that is, without any icons), use the procedure for “Two Bibs in Alma”.

The top screenshot shows the Alma interface with the 'Institution' tab selected. The search result is for 'Winter of the world / Ken Follett.' with details including subject, series, creation date, and modification date. A red arrow points to the 'Institution' tab.

The bottom screenshot shows the Alma interface with the 'Network' tab selected. The search result is for 'Ken Follett Three Bestsellers' with details including ISBN, creation date, modification date, and record number. A red arrow points to the 'Network' tab.

One Bib Record in Alma

In most cases, there is only one bib record for your title in Alma, whether it is in the NZ or in the IZ.

1) Same OCLC Number

Catalogers may edit a bib record in OCLC that was exported by Acquisitions to Alma in order to create a PO line. The case described here is when the existing Alma record has the same OCLC number (in field 035) as the record selected for cataloging; that is to say, Acquisitions already used the best OCLC record.

1A) Record in the NZ

In most cases, bib records that are in the NZ, which can be determined by an NZ icon next to a title in an IZ search. Overlay takes place automatically and no special action is required by the cataloger.

1B) Record in the IZ

Records that have no icon in repository search in the IZ and are not present at all in the Network Zone. These records must be moved to the NZ before overlay: once a record is in the NZ, overlay takes place automatically.

- Search for your record in the IZ.
- Click the Edit action link to start the Metadata Editor.
- In the File menu, click Share With Network.

- The record automatically releases.
- Close the Metadata Editor (Ctrl+Q) or click the Back link.
- Export from Connexion.

2) No OCLC Number

2A) Record in the NZ

For new purchases since migration, bib records used for ordering could be in the NZ, which can be determined by an NZ icon next to a title in an IZ search.

Search for your record in the Institution Zone, and if not found, search in the Network Zone.

- When the NZ record, click the Edit action link to start the Metadata Editor.
- Click on a field above where field 035 should be inserted.
- Press F8, or in the Edit menu, choose Add Field.
- Type 035 for the tag number and blanks for both indicators.
- In \$\$a, enter (OCoLC) followed immediately by the OCLC number, e.g.

035 __ \$\$a(OCoLC)32627360

- Save and Release the record.
- Close the Metadata Editor (Ctrl+Q) or click the Back link.
- Export from Connexion.

2B) Record in the IZ

Migrated brief bibs are in the IZ. They need to be moved to the NZ for an overlay to occur successfully: failure to do so results in duplicate records. Important: do the steps in this order, that is, add an 035 first and then Share with Network.

- Search for your record in the Institution Zone.
- Click the Edit action link to start the Metadata Editor.
- Click on a field above where field 035 should be inserted.
- Press F8, or in the Edit menu, choose Add Field.
- Type 035 for the tag number and blanks for both indicators.
- In \$\$a, enter (OCoLC) followed immediately by the OCLC number, e.g.

035 __ \$\$a(OCoLC)32627360

- In the File menu, Save the record.
- In the File menu, click Share With Network.
- The record automatically releases.

- Close the Metadata Editor (Ctrl+Q) or click the Back link.
- Export from Connexion.

3) OCLC Number in Alma is Different From OCLC Record To Be Downloaded

On occasion, there is a bibliographic record in Alma but it is not the one a cataloger intends to use. For example, it could be a less-than-full record chosen at the time of ordering, or a record for a different edition of a book.

3A) Record in the NZ

Deletion of existing 035s should be limited to those cases when the OCLC number in a record is different than the number in the preferred WorldCat record. (**STOP!** Cataloger must be certain about the matching record and only delete OCLC records numbers for titles not held by other CCC libraries.)

- Search for your record in the Institution Zone.
- Click the Edit action link to start the Metadata Editor.
- If there is an 035, replace it with the matching OCLC record number.
- In the File menu, Save the record.
- The record automatically releases.
- Close the Metadata Editor (Ctrl+Q) or click the Back link.
- Export from Connexion.

3B) Record in the IZ

Deletion of existing 035s should be limited to those cases when the OCLC number in a record is different than the number in the preferred WorldCat record. **Important: do the steps in this order, that is, add an 035 first and then share with network.**

- Search for your record in the Institution Zone.
- Click the Edit action link to start the Metadata Editor.
- If there is an 035, replace it with the matching OCLC record number.
- In the File menu, Save the record.
- In the File menu, click Share With Network.
- The record automatically releases.
- Close the Metadata Editor (Ctrl+Q) or click the Back link.
- Export from Connexion.

Two Bib Records in Alma

On occasion, there are two records in Alma for your title: one in the NZ and one in the IZ, not linked together. For example, another CCC library has holdings in WorldCat, so there is a bib record in the NZ, while you have a brief record in your IZ. It is important to relink any existing inventory and PO lines to the NZ record so that your inventory will end up on the NZ record that will be overlaid.

It is also important to relink all inventory and delete any extraneous IZ bib records BEFORE you export from OCLC, especially if the two separate unlinked bibs have the same OCLC number. Alma will create duplicate records if it sees identical OCLC numbers in any zone, even if you have your OCLC export set to the NZ only.