

From Becka Cooling

OCLC

Our work group has already determined that the NZ is to be populated with the holdings from all libraries in the CCL LSP consortium, and that the OCLC number is the matching point for identifying and avoiding duplicates in the NZ and determining the match between the record in the NZ and its corresponding OCLC master record.

1. Do libraries need to maintain their holdings in OCLC Connexion? Assuming that their records are in the NZ, what are the advantages of also having accurate holdings reflected in OCLC? (I'm thinking ILL for one). And if they do need to maintain accurate holdings in OCLC, is there a way to attach and delete holdings from inside of Alma, or can that work only be done in OCLC Connexion?

Yes (for physical materials). A bit trickier for electronic resources managed via the CZ (no synchronization of knowledge bases CZ and WorldShare Collection Manager for e-collections).

2. Do we need a system-wide normalization rule for importing records from OCLC into the NZ? Or can we import the record as it is, directly from OCLC, and just configure the display of the record in Primo VE to hide certain MARC fields?

- Our group created a [Migration of Local Data to Local Bibliographic Extension Fields](#) document (adapted from CSUs), which outlines the use of MARC fields for local data. For example, the 900-925 fields are reserved for consortial data. Wouldn't we need an import profile to at least strip those fields from the record from OCLC before we add it to the NZ?

Yes. See the CSU documents:

- [Alma Daily OCLC Bib Record Updates & OCLC WorldShare Collection Manager](#)
- [Import Profiles for Loading Brief Order Records and WCP into NZ](#)
- [See also the Systems Policies and Procedures:
<https://calstate.atlassian.net/wiki/spaces/ULMSS/pages/108560391/Systems+Policies+and+Procedures>](#)

Yes, libraries can continue to catalog directly in Connexion and use export function for title-by-title catalog. Set up OCLC gateway export settings. Note, however, that libraries have the option to use the functionality "Publishing to OCLC" to synchronize holdings from Alma to OCLC. See [Publishing to OCLC](#)

3. Does most of the cataloging at the CSUs happen in OCLC Connexion (except adding local bib extension fields) as opposed to inside the Metadata Editor in Alma? If so, was any OCLC training offered to staff/librarians at the CSUs?

Yes. Currently no way to add and export Local Fields directly from OCLC to Alma.

A brief training about setting up gateway and following procedures to check Alma first (both IZ and NZ) to avoid adding duplicate records and ensuring proper overlay of records (brief order records, for example).

4. If a library currently uses OCLC WorldShare Collection Manager (for example, to overlay brief bibs received from the vendor at time of purchase with full bibs from OCLC), would there be any reason to retain that service? Assuming that the brief bibs provided by the vendor could be added and then merged with records from the NZ, it seems like that service would be redundant?

To be discussed during meeting. Not sure if question refers to use of GOBI API.

Network Zone (NZ)

1. Can *all* CSU libraries import records into the NZ? Did CSU staff receive training about working in the NZ? Is there a minimum level (quality-wise) that a record must be to be imported into NZ?

- It looks like CSUs allow brief records to be imported into the NZ -- what is the reasoning for this? Are brief bibs only allowed under certain conditions (say, if there is no full level record in OCLC)? Are libraries encouraged to attach their holdings to a brief record in the NZ, or are duplicates allowed (until a higher quality record can be imported?) If so, how do those brief records get merged eventually?

CSU adopted a number of policies and procedures governing cataloging in this shared environment. That is, records should be added to the NZ (except for a few types: equipment, etc.). See many of the policies here: <https://calstate.atlassian.net/wiki/spaces/URM/pages/144572454/Documentation>

From Michael Habata

Network Zone

2. When the records for all the CCC libraries are added to the Network Zone, how will the system deal with duplication of title records with different OCLC numbers?

No way the system can detect duplicate records representing the same resource. In this case, some training is needed to ensure all catalogers know which records to choose in Connexion and how to avoid duplicate records for the "same resource." (To be discussed further. Note the section in OCLC Bib Formats: When to Input a New Record.) Some training here and reminders will be necessary.

3. If dealing with duplicate bib records would have to be handled manually, should certain libraries/librarians have the authority to combine bibliographic records or make similar changes in the Network Zone? How does Cal State handle this, and should it be done differently with 110 participating libraries in CCC's Network Zone?

Here is what I call the problem of managing the Network Zone. We formed an NZ Management Group to deal with some of these issues and a mechanism to notify campuses to move their holdings, etc. (I can provide more details during our session.)

4. This may be more of a question for ExLibris, but when I have been doing practice cataloging in Alma, it doesn't seem possible to see print books owned by other libraries in the Network Zone, only those in one's own Institution Zone.

Not true. In Alma, HELD BY is shown in the NZ record indicating every campus holding that title. (I can demo this live.)

How does one make sure not to duplicate existing print resource records in the Network Zone in adding records to the Network Zone?

Mentioned above. This is really governed by policy and training.

From Glorian Sipman

Does he have a recommendation on the best place to start cataloging?

Basically, I'm trying to figure out for us, if it makes sense to catalog within Alma, looking for records in the NZ first, and then adding our holdings in Connexion (whether through an automated report or manually). Presumably, if we don't find records in Alma, then we'd have to look in Connexion.

Or, if we can/should continue to catalog in Connexion, loading the bib files into Alma. This is what we're used to, so it would be nice if we could at least start this way. If so, what happens in the NZ if the bib record is a dup? Will our incoming record be merged with the existing NZ record? Presumably, if we add the \$9LOCAL to 590 notes, they'll be preserved for us.

At this point, we don't have plans to implement acquisitions beyond what seems to be required for serials check-in and e-resources. We also don't include brief order records in our current ILS, so I'm not concerned with issues of overlaying the brief record when the item is received.

All good questions. Yes, you can continue to catalog in Connexion, as you currently do. Just make sure to check Alma to identify record in NZ (if any) and/or brief order lacking OCLC record number.. Here is an initial document we followed: [Overlaying Bibliographic Records in Alma: Procedures, which needs to be updated.](#) .

From Cheryl Cruse

1. (Related to Becka's question #4): How is cataloging of delivered files of DDA eBooks handled? Currently our library currently has MARC records delivered from Ebsco to OCLC WorldShare Collection Manager and then we load them into ILS. Will we still need WorldShare for this purpose? If we don't have WorldShare, where are the DDA records delivered? OR since they are going into Ebsco ebook database collection, maybe this step is no longer needed?

This is a good question and I believe Alma handles DDA for a consortium. If it is a Consortium DDA program, then records are loaded and managed at the NZ level. As for a local DDA, then managed locally. I was not involved with the setup for these e-collections, but other colleagues have developed some procedures and I will see if they can share how they have done it.