



## Eluna Learns Metadata Session Q & A

### **Have you thought about using students for the scanning step?**

Yes, we'd like to have students do book scanning and physical processing but unfortunately due to budget issues we do not have student workers in technical services.

### **Do you use item policies to control checkout policies? If so, when do you add the item policy, as they're not included by default in GOBI to Alma POLine creation, but the information is needed in order for Circulation to check out an item.**

Yes, we use item policies. For shelf ready books, we use the default (blank) item policy associated with the main stacks location.

### **It looks like you perform physical processing before cataloging. During the cataloging process the call number needs to be adjusted sometimes. How do handle such adjustments?**

Yes, GOBI performs physical processing for shelf ready books. If we need to adjust the call number, we can retrieve the book from the stacks. Fortunately, this is rare, and I also try to catch call number issues with my Analytics reports before we receive the book.

### **What proportion of your shelf-ready titles arrive with only brief bib records or with records that have errors other than incorrect call numbers?**

Brief bib records and incorrect/incomplete/missing call numbers are rare. My estimate: less than 5 per shipment.

### **Does your suppressed location allow checkout? Patrons could find books on shelf (or get an Interested In email) and want to check out before copy cataloging is finished.**

Our technical services location (camoff) does not allow for checkouts. Cataloging should change the location to an unsuppressed location but if we forget to, our circulation folks can update the location to enable checkout.

### **Why do you leave the records suppressed from discovery, if they are going to the shelves the day after they arrive?**

After ordering the item is placed in a suppressed location because we don't know when or if we'll receive the book and we don't want users to think we have something we don't yet. During copy cataloging we move the book to an unsuppressed location so that it displays as available in discovery.

**Was any of this workflow was developed in COVID conditions when potentially having to catalog remotely?**

Yes, we were facing backlogs of print books and had to figure out a way to quickly make available the shelf ready books and allow flexibility in copy cataloging remotely.

**For call #s that need adjustment, do you request a refund for the incorrect numbers?**

No, I didn't know we could do this, but it is rare, so I don't think we'll pursue refunds.

**What if a patron pulls a book off the shelf to check out prior to it having been catalogued?**

If the book is still in the camoff (tech serv location) the book will not checkout but our circulation dept can update it to a circulating location.

**If the location is suppressed until copycat is complete, but the book is already on the shelf, is it fair to say the benefit is for patrons who are physically browsing, but not for those who are searching the catalog?**

Possibly? (Sorry I had trouble figuring out how to answer this question.) Ideally, we want shelved books to be available in discovery as soon as possible. For browsing users we're trying to get the book on the shelf promptly and for catalog searchers we want the book available in the system promptly too.

**Can you share the link again? We missed it here.**

[https://docs.google.com/presentation/d/1s05wcDPRuuFFaEyAer\\_SzDI1mCGD-H6CKVFbNpva9xo/edit?usp=sharing](https://docs.google.com/presentation/d/1s05wcDPRuuFFaEyAer_SzDI1mCGD-H6CKVFbNpva9xo/edit?usp=sharing)

**Do you check illustrious, maps for field 300? Also, the unnumbered pages of plates 500 notes?**

No, we usually don't scan illustrations, maps, plates. The book scanner can if they wish to but mostly, we assume that if the other info matches (title, author, edition, publication year, page numbers of front matter and book) then the book matches the bib record

**I thought they were shelved in the collection prior to cataloging being done.**

Depending on when we scan and when the students shelve, we can copy catalog before, during or after a book is shelved. It would be ideal if a book were made available in real-time as it's being shelved but I think the only way to do this is if the shelving students scanned the book in to clear the acq tech serv work order.

**Do you do the same level of verifying a title with ebooks from GOBI after receiving a title?**

For title-by-title ebooks we do less verifying than print books. We compare title and author and view a random page to confirm full text access. We rely on the CZ as much as possible for efficiency even though we know knowledgebases are not perfect.

**Why do you want books on the shelf if they can't be checked out?**

Ideally all books on shelf should have the correct location which enables checkout. But if there are books with the incorrect location our circ folks can update the location.

**Why do you not use the full record overlay when the title is invoiced?**

I'd rather we get the full bib record before receiving and invoicing. I don't do the invoicing but I'm not sure if GOBI sends us full bib record with invoices.

**How does this process allow users faster access to the books if the books stay suppressed from discovery until after copy cataloging?**

The books don't sit in technical services and wait to be cataloged. Copy cataloging from book scans is usually fast enough so that we can make the books available (unsuppressed) within a few days of receipt.

**COVID - makes sense! This is a much longer time-consuming process. I have received and copy cataloged 100 % 2B books in a day, and they were on the shelf displaying in primo and ready to check out within 48 hours.**

The workflow has worked for us due to our hybrid flexible work environment. It takes about 1 minute to scan 2 books.

**I thought from the demo it looked like the Holdings information was suppressed, but not the bibliographic record. Maybe that way the record is still visible and searchable in Primo?**

Yes, the holdings and item info is suppressed but title-level (bib record) info displays in Primo VE.

**Have you compared the time spent on pre-cataloging, such as scanning, handling PDF files, etc. and the time on real copy cataloging? Wondered if this procedure is faster?**

I don't have time studies to compare scanning vs copy cataloging with the item in hand. Book scanning doesn't take too long about 2 books per minute. Also, pre-cataloging is rare (most of our bib records) are full and it helps us do prep work before we receive the book shipment.

**Certainly, this procedure works to accommodate COVID conditions.**

Sure, it gives use the flexibility to work on site and remotely.

**How many copy catalogers works with just print books?**

We have 4 copy catalogers. They mostly work with print books but not exclusively. The cataloging unit also handles activation and copy cataloging of title-by-title ebooks.

**For the import profiles are we only allowed to have a rule to replace one specific field, or does the rule cover all the subject headings we want to replace?**

You can write several rules in one drool file for a normalization rule. For instance, the normalization rule that WRLC uses to add their local subject headings (which can be found in the Community folder under the name 'WRLC transform 650 to 650 subf 2 local subf 5 CAO') contains one rule for each local subject heading. If you'd like to learn more about writing normalization rules, I'd recommend going to the Alma Knowledge Base

([https://knowledge.exlibrisgroup.com/Alma/Product\\_Documentation/010Alma\\_Online\\_Help\\_\(English\)/Metadata\\_Management/016Working\\_with\\_Rules/020Working\\_with\\_Normalization\\_Rules](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Metadata_Management/016Working_with_Rules/020Working_with_Normalization_Rules)).

**Has WRLC made plans for when to use local authority records versus norm rules (or both) to make changes to subjects?**

WRLC adds local subject headings based on the existence of LCSH; for example, if a bib record has the LCSH of 'Foreign property' then a local heading of 'Noncitizen property' is added. Because we are not changing the original LCSH, we use normalization rules to add the local headings. If in the future we wish to update our local headings, we could edit our local authority records so that the old heading becomes the non-preferred term (is moved from the 150 field to a 450 field); then Alma would update our local headings through the Preferred Term Correction job that is run daily.

**Is there a reason why you move a local heading back to a 650\_7 instead of leaving it in the 690 field?**

We wanted our local headings to be in the MARC21 field for subject headings, that way when the Alma authority control jobs are run, the local headings will be linked to their respective local authority records. If the headings remained in the 690 field, they would not be linked to authority records by Alma.

**Do you have any opinion with using the normalization rules in the discovery system (PRIMO), using the BackOffice, instead of changing bib records in ALMA?**

With both Alma and Primo, there is always more than one way to do things. In this particular instance, using either Alma or Primo to enact changes in your metadata is up to personal preference. For our consortium, the issue of subject headings came about in our Metadata Committee - because we were all Catalogers, our instinct was to change the bibliographic metadata. If a person or group at a library wants to edit subject headings but feels more comfortable working with Primo than with Alma, it would make more sense for them to use Primo normalization rules. In the end, its up to personal preference.

**Have you had any issues if there are hundreds or thousands of rules in the import profile thing? (Lots I want to replace from LCSH.)**

I have not had any issues, though our normalization process only contains 7 rules total. I would suggest testing in a sandbox before making any changes in the production environment, just to be sure that everything runs smoothly.

**How many local subject headings do you have?**

We currently have seven local subject headings.

**Would a library need to make considerations/alterations to this process if they're part of a consortium?**

The most important thing to keep in mind with a consortium is making sure all schools agree to local subject headings in NZ records. If they do, then you would be able to make the necessary changes and configurations in the NZ. If individual schools wanted to replicate the local headings for their IZ-only records, they would need to configure everything in their own Alma IZ.

**Is the hidden 650 field still discoverable by keyword or subject search?**

Yes. If you "hide" a 650 field using a Primo VE display rule, the heading will still be searchable through a keyword search - the only difference is that it will not appear to the patron in the full record view.

**Has your org considered putting resources into working to change LCSH rather than, or in addition to, adapting your own catalog to LCSH as it is?**

When our consortia first discussed adding local headings, I believe the overall feeling was disappointment in how Library of Congress' efforts to update their subject headings became a political issue. Change either wasn't happening fast enough or wasn't happening at all. We thought the best way to make a fast change was to take matters into our own hands and utilize Alma's local authority features. Now that the political situation is a bit different, it would definitely be worthwhile to discuss actively working with Library of Congress to update their subject headings.

**Have you considered writing a norm rule to eliminate headings altogether and replace with preferred local headings?**

Yes, we did discuss that possibility when first discussing local subject headings. There were several schools in our consortia who did not feel comfortable actively deleting Library of Congress subject headings from bib records for a variety of reasons. Some staff and patrons were used to searching with the original LCSH term. Others pointed out that if LC were to update the problematic heading in the future to a more culturally sensitive term, would we have to add the headings back again. There were enough valid reasons presented that we thought it best to keep the LCSH.

**How have you achieved this level of knowledge about Alma?**

Through a mix of reading the Alma Knowledge Center and testing in the sandbox environment. Also, I'd recommend opening a Salesforce case if you can't find the answer to a specific question.

**Have you considered to keep both LC heading and add yours?**

That is the current workflow for our local headings; the LCSH is always kept in the record (it is not deleted); our normalization rule just adds a local heading.

**Does the LibAnswers report a problem in Primo feature require a second ticketing queue?**

It does not! It's totally optional to add a second queue IF you want to route the primo support tickets to a specific group of librarians, for example the ERM-Team / E-Resources Librarians instead of everyone getting notifications of the Primo tickets

**Is there a way to preview the new Databases A-Z? Very excited for the updates!**

Not yet, but as we get closer we'll be launching webinars to update folks.