

Semi-automated catalog management:

Making de-duplication a part
of your eResources workflow



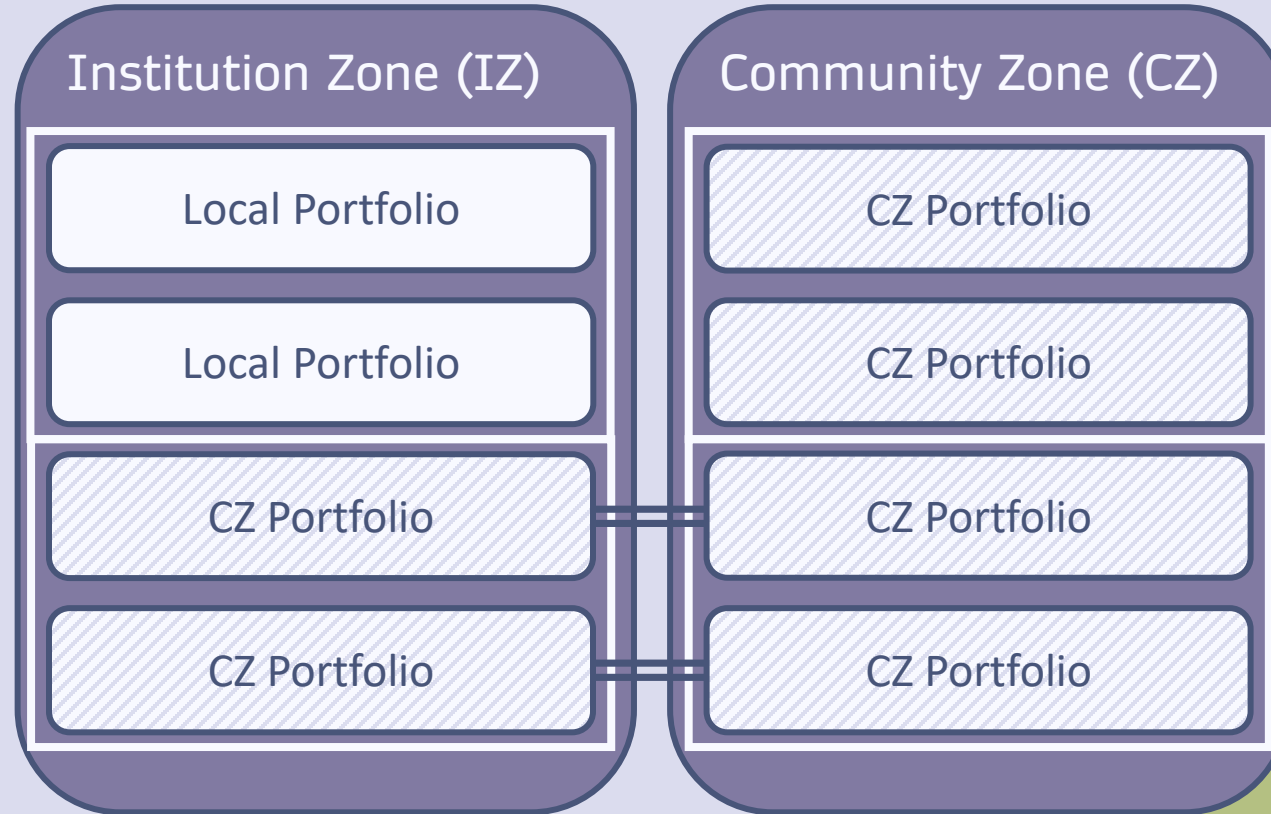
Katie Peterson
University of Iowa Libraries
June 29, 2023



	Alma	FOLIO	WorldShare
Central Knowledge Base	Community Zone	eHoldings app	WorldCat Knowledge Base
Analytics tool	Alma Analytics	FOLIO Analytics	WorldShare Reports



Alma Community Zone



Alma Analytics

Frontlog of ebooks to catalog, marked as either new eb or new ebook

not-cataloged-ebook-new-ebook

Total 21

MMS Id	Material Type	Resource Type	945 ▲▼	Title (Filing)	OCLC Control Number (035a)	Uniform Resource Identifier	Subjects
9984423348702771	Book	Book - Electronic	New EB mcr 20230608	Integrated critical thinking and clinical reasoning in pharmacy practice / [edited by] William Cary Mobley, Robin Moorman Li.	1372498429		Pharmaceutical Services.; Clinical Reasoning.; Patient-Centered Care--methods.; Thinking.
9984423348802771	Book	Book - Electronic	New EB mcr 20230608	Mohrman and Heller's cardiovascular physiology / David M. Harris.	1381144285	http://accessmedicine.mhmedical.com/book.aspx?bookid=3346	Cardiovascular system--Physiology.; Cardiovascular Physiological Phenomena
9984423348902771	Book	Book - Electronic	New EB mcr 20230608	ECG core curriculum / Franklin H. Zimmerman.	1378685387	https://accessmedicine.mhmedical.com/book.aspx?bookid=3339	Electrocardiography--Methods.; Cardiovascular system--Diseases--Diagnosis.; Electrocardiography.; Heart Diseases.--diagnosis



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How can we give patrons
immediate access to our
medical textbooks and have
automatic linking updates?



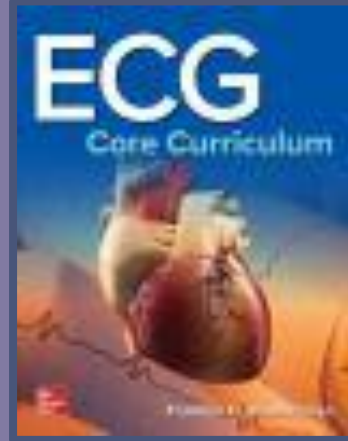
The process:

1) Library assistant adds medical textbooks to Alma as they become available

2) Textbooks appear in a New eBook Analytics report, and I enhance the records as necessary

Institution Zone (IZ)

Local portfolio



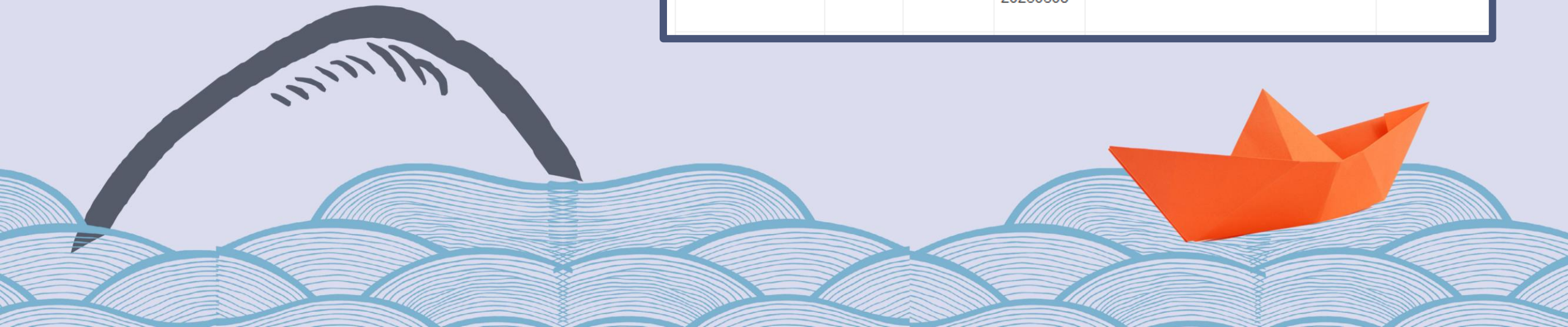
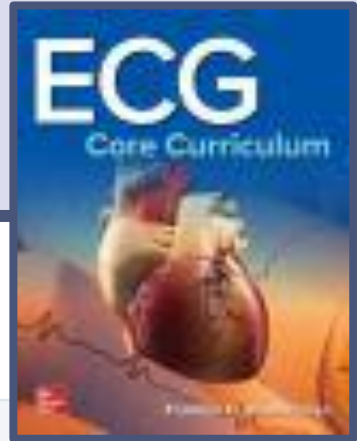
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The process:

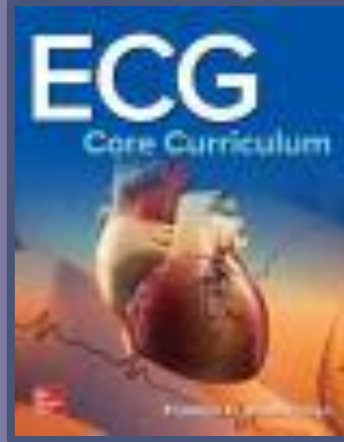
3) Alma adds the textbooks to the CZ



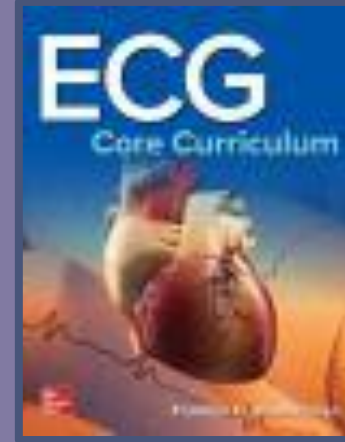
Old method:
Review these additions through
weekly Community Zone updates.
Manually activate the new addition
and delete the local portfolio.

Institution Zone (IZ)

Local portfolio

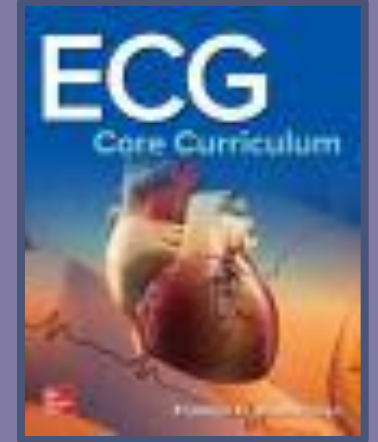


CZ portfolio



Community Zone (CZ)

CZ portfolio



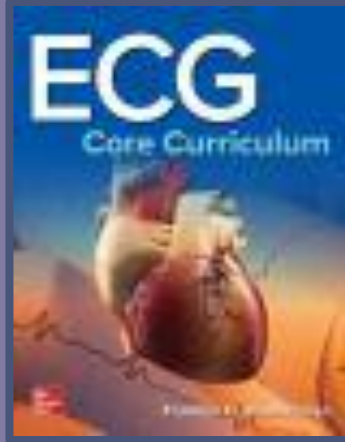
The process:

3) Alma adds the textbooks to the CZ

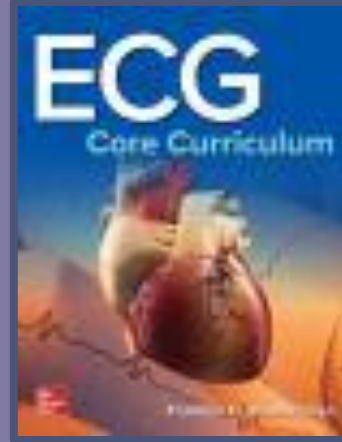
New method:
Auto-activate the textbooks. Use an
Analytics report to detect
duplicates.

Institution Zone (IZ)

Local portfolio

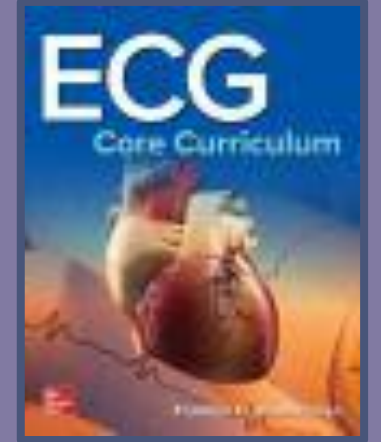


CZ portfolio



Community Zone (CZ)

CZ portfolio



4) I remove the duplicates
that were detected



The report:

New CZ bibs with IZ counterparts

These are titles that were added locally before a record was created in the CZ. Now that there is a record in the CZ, there are two records and they must be de-duplicated.

Title	Author	Publication Date	MMS Id	Portfolio Linked To CZ	Local Param 02	Electronic Collection Public Name	Portfolio URL
ECG Core Curriculum		2023	9984429848402771	Yes		McGraw-Hill AccessMedicine	https://accessmedicine.mhmedical.com/book.aspx?bookid=3339
ECG core curriculum /	Zimmerman, Franklin H., author.	[2023]	9984423348902771	No	Cataloged kmp 20230619	McGraw-Hill AccessMedicine	https://accessmedicine.mhmedical.com/book.aspx?bookid=3339
Pharmacotherapy Handbook, 12th Edition		2023	9984429845802771	Yes		McGraw-Hill AccessPharmacy	https://accesspharmacy.mhmedical.com/book.aspx?bookid=3324
Pharmacotherapy handbook /		2023.	9984397640902771	No	Cataloged kmp 20230523	McGraw-Hill AccessPharmacy	https://accesspharmacy.mhmedical.com/book.aspx?bookid=3324

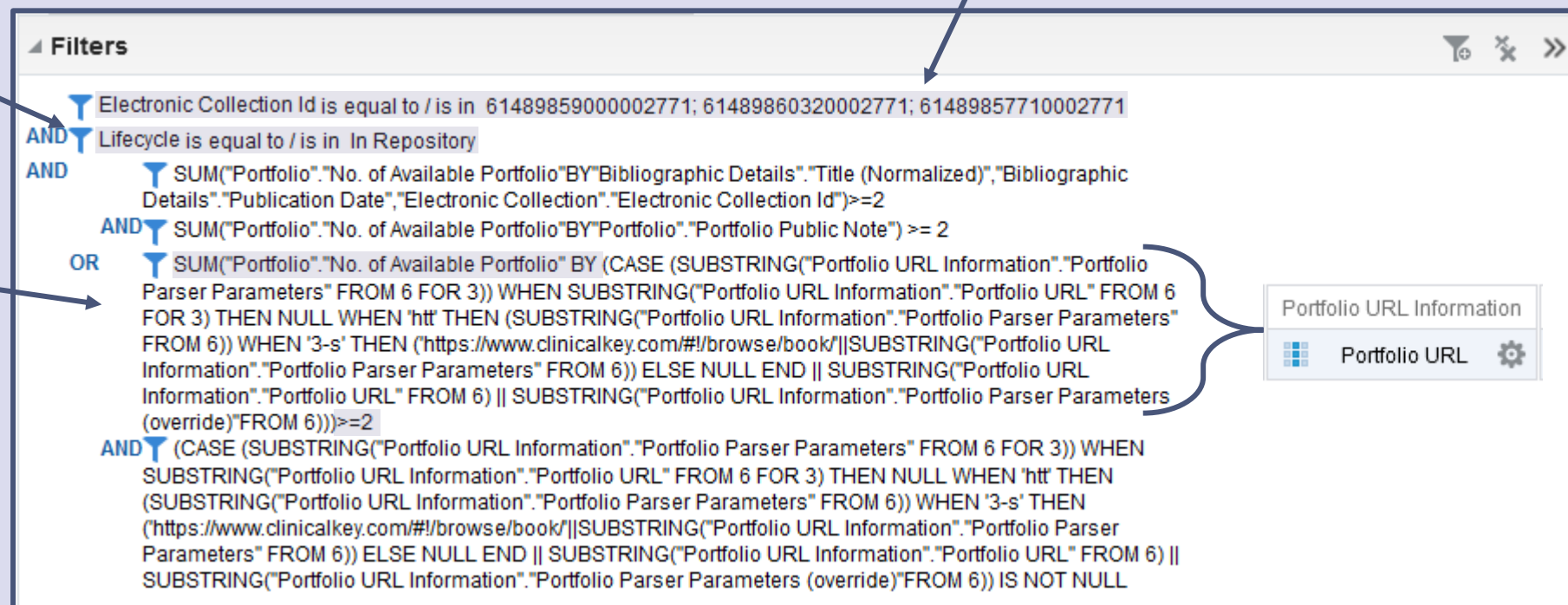


The report:

Selects which collections to look at

Ensures that resources appearing are current

Checks for resources that are within the same collection and have the same link



The screenshot shows a search filter interface with a list of filters. Annotations point to specific parts of the interface:

- An arrow points from the text "Selects which collections to look at" to the first filter: "Electronic Collection Id is equal to / is in 61489859000002771; 61489860320002771; 61489857710002771".
- An arrow points from the text "Ensures that resources appearing are current" to the second filter: "Lifecycle is equal to / is in In Repository".
- An arrow points from the text "Checks for resources that are within the same collection and have the same link" to the third filter, which is a complex SUM function involving "Portfolio URL Information".

The filter list includes:

- Electronic Collection Id is equal to / is in 61489859000002771; 61489860320002771; 61489857710002771
- AND Lifecycle is equal to / is in In Repository
- AND SUM("Portfolio"."No. of Available Portfolio" BY "Bibliographic Details"."Title (Normalized)", "Bibliographic Details"."Publication Date", "Electronic Collection"."Electronic Collection Id") >= 2
- AND SUM("Portfolio"."No. of Available Portfolio" BY "Portfolio"."Portfolio Public Note") >= 2
- OR SUM("Portfolio"."No. of Available Portfolio" BY (CASE (SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters" FROM 6 FOR 3)) WHEN SUBSTRING("Portfolio URL Information"."Portfolio URL" FROM 6 FOR 3) THEN NULL WHEN 'htt' THEN (SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters" FROM 6)) WHEN '3-s' THEN ('https://www.clinicalkey.com/#!/browse/book/||SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters" FROM 6)) ELSE NULL END || SUBSTRING("Portfolio URL Information"."Portfolio URL" FROM 6) || SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters (override)" FROM 6))) >= 2
- AND (CASE (SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters" FROM 6 FOR 3)) WHEN SUBSTRING("Portfolio URL Information"."Portfolio URL" FROM 6 FOR 3) THEN NULL WHEN 'htt' THEN (SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters" FROM 6)) WHEN '3-s' THEN ('https://www.clinicalkey.com/#!/browse/book/||SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters" FROM 6)) ELSE NULL END || SUBSTRING("Portfolio URL Information"."Portfolio URL" FROM 6) || SUBSTRING("Portfolio URL Information"."Portfolio Parser Parameters (override)" FROM 6)) IS NOT NULL

On the right side, there is a sidebar with a search icon, a close icon, and a right arrow. Below these is a section titled "Portfolio URL Information" with a sub-section "Portfolio URL" and a gear icon.

Takeaways

- This workflow does the heavy lifting by locating the duplicates for us, but it also enables human control to maintain the catalog quality
- Central Knowledge Bases are extremely helpful, but we must use them in a manner that still aligns with our patrons' needs





Thank you!

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