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WASHINGTON, DC

Holdings records and MarcEdit come to rescue:

GW's approach to local data display

TJ Kao
Director of Resource Description
George Washington University Gelman Library
tkao@gwu.edu

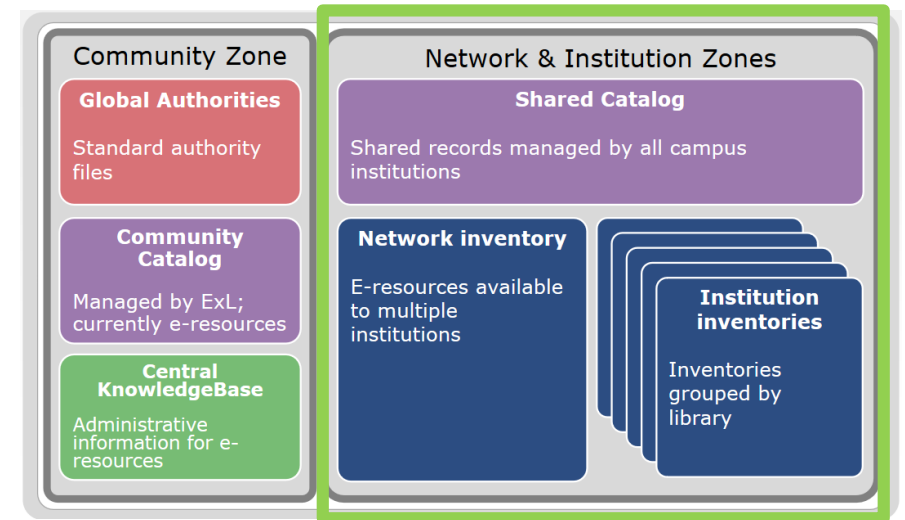


Himmelfarb
Health Sciences Library



Background

- Went live on Alma/Primo VE in July 2018
- NZ is used as the repository for shared bibliographic records and to facilitate fulfillment network
- Each consortium member manages its own IZ
- Institution specific data needed to be moved to local extensions
 - e.g. 541 -> 975, 561 -> 961, 562 -> 962, 563 -> 963, 700 -> 970



WRLC's mapping of local extensions

	A	B	C
	Local Field Mapping		
	Original MARC tag	Content	IZ tag
1	505	TOC, Vendor Supplied TOC	955
2	506	Access restriction	596
3	510	Citation, Reference	597
4	520	Summary	598
5	521	Grade level	954
6	524	Preferred citation	984
7	530	Additional Physical Form available Note	953
8	536	Funding information	594
9	540	Terms of usage	976
0	541	Immediate Source of Acquisition	975
1	545	Biographical or historical data	
2	561	Provenance note	961
3	562	Copy and version note	962
4	563	Binding note	963
5	583	DDA	969
6	586	Award note	
7	590	Local note (public)	590
8	595	Internal Notes	595
9	599	Non-public notes	599
0	600	Subject - personal name	690
1	610	Subject - corporate name	691
2	611	Subject - meeting name	692

Issues relating to local data exposure

1. Local extension data only appear in home institution's Primo instance
2. Some data stored in local extensions are searchable in other consortium institution's Primo instance but don't show up
3. When there are multiple copies at an institution, it is confusing to users which copy the information applies to

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MARC 21 Format for Holdings Data

[Library of Congress](#) >> [MARC](#) >> [Holdings](#) >> 3XX, 5XX, 84X

MARC 21 Holdings

"Full" documentation refers to the *MARC 21 Format for Holdings Data* that contains

"Concise" documentation refers to the *MARC 21 Format for Holdings Data* that contains

- 337 - Media Type (R) [Full](#) | [Concise](#)
- 338 - Carrier Type (R) [Full](#) | [Concise](#)
- 347 - Digital File Characteristics (R) [Full](#) | [Concise](#)
- 506 - Restrictions on Access Note (R) [Full](#) | [Concise](#)
- 538 - System Details Note (R) [Full](#) | [Concise](#)
- 541 - Immediate Source of Acquisition Note (R) [Full](#) | [Concise](#)
- 561 - Ownership and Custodial History (R) [Full](#) | [Concise](#)
- 562 - Copy and Version Identification Note (R) [Full](#) | [Concise](#)
- 563 - Binding Information (R) [Full](#) | [Concise](#)
- 583 - Action Note (R) [Full](#) | [Concise](#)
- 841 - Holdings Coded Data Values (NR) [Full](#) | [Concise](#)
- 842 - Textual Physical Form Designator (NR) [Full](#) | [Concise](#)
- 843 - Reproduction Note (R) [Full](#) | [Concise](#)
- 844 - Name of Unit (NR) [Full](#) | [Concise](#)
- 845 - Terms Governing Use and Reproduction Note (R) [Full](#) | [Concise](#)

541 - Immediate Source of Acquisition Note (R)

MARC 21 Holdings - Full

October 2005

First Indicator

Privacy

- No information provided

0 - Private

1 - Not private

Second Indicator

Undefined

- Undefined

Subfield Codes

\$a - Source of acquisition (NR)

\$b - Address (NR)

\$c - Method of acquisition (NR)

\$d - Date of acquisition (NR)

\$e - Accession number (NR)

\$f - Owner (NR)

\$h - Purchase price (NR)

\$n - Extent (R)

\$o - Type of unit (R)

\$3 - Materials specified (NR)

\$5 - Institution to which field applies (NR)

\$6 - Linkage (NR)

\$8 - Field link and sequence number (R)

FIELD DEFINITION AND SCOPE

Information on the immediate source of acquisition of the described materials. Used primarily for original or historical items or other archival collections.

Original source of acquisition is recorded in field 561 (Ownership and Custodial History).

Field 541 is repeated when recording the acquisition of additional material in a collection. An additional field 541 is made for each addition. This field is identical to [field 541](#) (Immediate Source of Acquisition Note) defined in the *MARC 21 Format for Bibliographic Data*.

Observation

- Identical to their counterparts of MARC 21 Format for Bibliographic Data
- All four tags are for notes but not for access points
- All four tags have \$3 material specified subfields

Pre-implementation preparation

1. Check Primo VE's configuration for holdings records
2. Do these notes appear in other consortium partner's Primo?
3. Have we been using these MARC tags in bibliographic records consistently?
4. Have we been sticking to the "1 holdings record for 1 copy" policy?
5. Is there other MARC tag or subfield we need to use additionally?
6. Are there tools available for batch processing?
7. What's stakeholder's reaction?

Workflow

1. Identify bib records with local notes and create a set
2. Export this set
3. Export MMS IDs of bib records in this set
4. Download these bib records by searching their MMS IDs
5. Clean up the format of 9XX notes and save these records as set #1
6. Download these holdings records by searching their MMS IDs
7. Copy 999 \$b to 001 and save these records as set #2
8. Merge set #2 with set #1's 9XX
9. Flip 9XX to the corresponding generic MARC tag
10. Update these holdings records in Alma

Unresolved issues

- Holdings records don't deal with access points
- Have to keep data in both bibliographic and holdings records, at least, for now
- More clean-up for data erroneously put in 500/590

Conclusion

- Low barrier in terms of implementation and maintenance
- Take advantage of well-established standards
- Facilitate data transformation/repurpose

Q & A