**CSU Migration of Local Bibliographic Data to Alma Local Extensions to Bibliographic Records[[1]](#footnote-1)**

Adopted February 29, 2016; revised March 15, 2016

**Background**

Ex Libris has developed Alma functionality that will allow a library to migrate local bibliographic information into local fields, referred to as “local extensions to bibliographic records.” These local extensions would display to users in both Alma and Primo as if they were part of the bibliographic record, but would be stored in the library’s Institution Zone (IZ). This protects the local fields in bibliographic records from being lost when master records in the Network Zone (NZ) are overlayed with an updated record.

Local information (information not contained in the WorldCat master record) in a non-local bibliographic field (e.g., 500 note or 700 added entry) will be lost when that record’s inventory (holding and item records) are relinked to the master record in the Network Zone. Information in fields with specific field tags, and marked with a subfield $9 LOCAL, will be moved to local extensions during migration and retained until deleted by the library.

**Scope**

This document provides a list of local fields to be used as local extensions, mapping of local fields for migration of local bibliographic data to ensure data is protected, and procedure for marking local fields for migration.

**Proposal**

Ex Libris has proposed that the following MARC fields be reserved for local extensions:

09X – Local call numbers

59X – Local notes

69X – Local subject access fields

950-999 – reserved for NZ members’ local notes

Ex Libris has reserved 900-949 fields. Do not use these fields for local data![[2]](#footnote-2)

OCLC has reserved the following fields exclusively for OCLC use: 936, 938, 950, 951, 994, 987, 989-999. To avoid potential problems in the future, these fields should not be used for local data.

The table below represents a set of fields that should cover all of the use cases reported by CSU campuses in response to the survey on “**Inventory of Local Fields**.” All fields would be indexed and searchable in Alma.[[3]](#footnote-3) Display and indexing of the fields in Primo is controlled at an installation level by the CSU as part of standard Primo Back Office configuration. This is not institutionally customizable, though display labels are customizable at an institution level. The list below contains examples of local field tags in existing records (**Pre-Alma** column); the local extension tag (**Alma** column), the standard MARC tag the field is intended as an equivalent to (**MARC Field**), the name of the bibliographic local extension field (**Description**).

|  |  |  |  |
| --- | --- | --- | --- |
| **Pre-Alma** | **Alma**  | **MARC Field** | **Description** |
| 09X | 09X | 09X | Local call numbers *[See note below about call numbers]* |
| 500\*, 590 | 590-597  | 500 | Local institution-defined public notes |
| 541† | 591 | 541 | Immediate Source of Acquisition note (Gift) |
| 561† | 592 | 561 | Ownership and Custodial History  |
| 583 | 593 | 583 | Action Note (WEST shared print archive) |
| 020, 022, 024, 028\* | 598 | 020,022,024,028 | Local Standard Number |
| 599 | 599 | 500 | Local institution-defined public note |
| 690, 650\*  | 690 | 650 | Local–Topical Term |
| 691, 651\* | 691 | 651 | Local–Geographic Name |
| 693 | 693 | 653 | Local uncontrolled index term |
| 655 $2 local | 694 | 655 | Local Form/Genre |
| 696, 600\* | 696 | 600 | Local Subject Added Entry–Personal Name |
| 697, 610\* | 697 | 610 | Local Subject Added Entry–Corporate Name |
| 698, 611\* | 698 | 611 | Local Subject Added Entry–Meeting Name |
| 699, 630\* | 699 | 630 | Local Subject Added Entry–Uniform Title |
| 700\*, 790, 796 | 952 | 700 | Local Added Entry–Personal Name |
| 710\*, 791, 797 | 953 | 710 | Local Added Entry–Corporate Name |
| 711\*, 792, 798 | 954 | 711 | Local Added Entry–Meeting Name |
| 730\*, 799 | 955 | 730 | Local Added Entry-Uniform Title  |
| Item record856 42  | 956 | -- | Local Electronic Location and Access (Digital bookplate URL) *[Sacramento: Alma & SJSU]* |
| 909 | 957 | -- | Bookplate ID *[Sacramento: Alma]* |
|  | 958 |  | Local institution-defined (Reserved) |
| 246  | 959 | 246 | Local Added Entry–Varying Form of Title |
| 740\* | 960 | 740 | Local Added Entry–Uncontrolled Related/Analytical Title |
| 440, 490, 830\* | 961 | 830 | Local Series Added Entry–Uniform Title |
|  | 962-969 |  | Local institution-defined internal notes |
| 970 | 970 |  | YBP Table of Contents  |
| 971 | 971 |  | Local Added Entry—Personal Name *[San Marcos: Alma]* |
|  | 972 |  | Local institution-defined internal note |
| 793 | 973 | 793 | Local Collection Title  |
| 910, 911, 920, 946, 948, 949 | 974 |  | Local institution-defined internal note: Cataloger’s initials |
| 970 | 975 | -- | Digital bookplate (Image) *[Northridge]* |
|  | 976-999 |  | Network-defined internal notes |
|  | 980-981 |  | Network-defined internal note: Order Information (e.g., YBP/PromptCat) |

†If note fields were not used primarily for archival collections (i.e., gifts/endowment notes for all types of materials); or, if note is not part of the master record.

\*If local data in these non-local data fields can be identified, then data can be migrated to the proposed fields (see section below “Process for finding local data entered in non-local fields”).

**Marking Fields for Migration**

To migrate local fields from bibliographic records to Alma local extensions, fields must be moved to fields using tags in the list above (Alma local extension column) and fields must be marked with the string **$9 LOCAL** (no period at the end of the subfield). It is the library’s responsibility to move the data present into the Alma column tag, and to mark it with $9 LOCAL, as illustrated below:

590 \_ \_$a Library's copy imperfect: upper left corner missing. **$9 LOCAL**

*Note: The number of fields migrated as bib record extensions needs to be restricted to information which is truly local information. If libraries move data (e.g., a 505, 700, and 740 that may or may not match the data in the OCLC master record) to a specified 9XX field and mark it for migration to bib record extensions, it will clutter up the Primo display and make it more difficult for our patrons.*

**Process for finding local data entered in non-local fields:**

There are many approaches a library could use in finding and marking local fields for migration to Alma local extension fields. The following general procedural steps are possible approaches:

* Find fields that contain specific words or phrases that denote a local field that does not use one of the standard local fields, e.g., 500 notes with ‘restricted’ or ‘gift’. Other common fields might be local collection names in 7XX added entries or local form/genre headings. In Millennium, copy those fields to their corresponding Alma field (example: copy 730 to a 955 field in Millennium), and mark that Alma field with “$9LOCAL”.
* Find fields that contain specific coding (indicators; or, subfield $2 local) that denote local data and map field to corresponding Alma field (example: copy 655 $2 local to 694 field in Millennium).

**Specific note about call numbers in the bibliographic record:**

If institutions have their local call number in the item record, and any data in their bib records with an 09X can be disregarded in the migration process, they simply do not mark those bib fields with $9 LOCAL and no localized fields will be created in Alma.

If institutions want to use the call number from the bib, this is reflected in the answer on the Millennium (III) Migration form and they do not need to mark that field as $9 LOCAL, but that call number will be selected from the bib and used in the Alma holding.

1. Adapted from Orbis document: “Preparing for Migration of Local Bib Data to Alma Bibliographic Record Extensions.” [↑](#footnote-ref-1)
2. Based on results of the Vanguard data load, Ex Libris notified CSU ULMS Implementation Team that 900-949 are reserved for Network Zone records. [January 27, 2016]. [↑](#footnote-ref-2)
3. Ex Libris allows each institution to select 5 Local Params (9XX fields) which can be defined as their own Alma Repository search index and made available through Alma Analytics. [↑](#footnote-ref-3)