

CZ Management Group Presents: CZ Metadata Overview, Contribution and Best Practices

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Webinar agenda

- Overview of CZMG and what we do
 - Scope of the group and responsibilities
- Community Zone overview
- Contribution and editing in the CZ (local vs. global)
 - Paying attention to when and why
 - Tips and tricks
 - Local extensions
 - Collection level vs title level contribution
 - Reporting to Ex Libris with issues; when and how
- Survey results from 2021
- Helpful resources/documentation

Overview of The Community Zone Management Group (CZMG)

- Established in 2015, as a subgroup of the Alma Product Working Group.
- A liaison and advisory group consisting of Ex Libris staff and library customers.
- Consist of 13 community members and 3 Ex Libris members
- Currently have representation on:
 - Alma Product Working Group (Liaison member: Stacie Traill)
 - Content Working Group (Liaison member: Galen Jones)
- Aiming to have representation on:
 - Authorities Working Group
 - Linked Data Interest Group

Membership 2022

Galen Jones (The Open University)	Joanne Rowan (University of Auckland)
Elizabeth York (Rutgers University)	Nicolle Glen (The Open University)
Jennifer Browning (Carleton University)	Hanna Elise Hansen (UiT The Arctic University of Norway)
Timothy Kaneshiro (Getty Research Institute)	Lauren Syer (Harvard University)
Stacie Traill (University of Minnesota)	Ardie Bausenbach (Library of Congress)
Steven Shadle (University of Washington)	Kristen Fredericksen (The City University of New York)
Amanda Perez (Spartanburg Methodist College)	Rael Elstein (Ex Libris)
Amotz Movshovitz (Ex Libris)	Dahlia Wisner (Ex Libris)

Scope of The Community Zone Management Group (CZMG)

Review, update and advise Ex Libris on policies and procedures related to Community Zone bibliographic metadata maintenance.

Advise on Community Zone training needs and the development and delivery of educational resources encompassing existing and evolving functionality.

Advocate for adherence to international metadata standards by content providers, industry bodies and the community.

Address misunderstandings or disagreements regarding detrimental editing, or the addition of incorrect metadata, to the Community Zone.

Scope of The Community Zone Management Group (CZMG)

Engage with the library community via discussion lists, conferences, etc., to communicate completed work, consult on proposed Community Zone projects.

Advise Ex Libris, and other community groups on matters concerning bibliographic records and functionality in the CZ and beyond.

Initiate a system to suggest specific improvements and adjustments to Ex Libris on a formal, regular basis and work closely with Ex Libris on planning improvements and changes to the community zone .

CZMG Webpage

<https://igelu.org/products-and-initiatives/product-working-groups/alma/community-zone-management-group/>



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Community Zone Management Group

About

The Community Zone Management Group (CZMG) functions under the auspices of the joint IGeLU and ELUNA Alma Product Working Group (PWG). It is a liaison and advisory group consisting of Ex Libris staff and library customers.

Membership

[Members](#)

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Community Zone Contributions/Contributors

Serial Records

- CONSER
- German Union Catalogue of Serials (ZDB)

Publishers/Providers

- ~55 contributors (mostly publisher eBook collections)

Customers

- Complete collections
- Individual titles to the free and miscellaneous collections

Tips to Remember while editing CZ records

CZ bib records display a people icon

If you are editing a CZ record, even if it is in your IZ, you are editing the CZ record itself, and your edits will be inherited by all libraries using the CZ record

Make sure the edits you make to CZ records are correct and beneficial for the entire community, including libraries that have access to the resource on a different platform

The screenshot shows a library catalog search results page. At the top, there are search filters for 'All titles' and 'Title'. The search criteria are: 'where (Title contains keywords "new york law journal" AND Tag Suppressed (Title) equals "No")'. The results are displayed in a list format with three entries. Each entry includes a selection checkbox, a people icon, the title, MMS ID, language, creation and modification dates, and a record number. Below each entry, there are tabs for 'Physical', 'Electronic', 'Digital', and 'Other details'. A table below the first entry shows the 'Interface Name', 'Collection Name', 'Service Type', 'Availability', and 'Portfolio' for the 'Electronic' version.

Facets

- Material Type**
 - Book (18)
 - Journal (35)
- Resource Type**
 - Book - Physical (18)
 - Journal - Electronic (7)
 - Journal - Physical (5)
 - + More (5)
- Language**
 - English (51)
- Publication Year**
 - 1888 - 1974 (11)
 - 1976 - 1980 (11)
 - 1981 - 1990 (11)
 - + More (2)

All Titles (1 - 20 of 53)
where (Title contains keywords "new york law journal" AND Tag Suppressed (Title) equals "No")

Save and Filter Query
Push Selected to MDE

Institution Community

Select All Sort by: Rank Secondary Sort by: Rank 0 rows selected Expand: Electronic

1 **New York law journal.** [Portfolio List](#) [Display in Discovery](#) ...

MMS ID: 991031122823504646 Language: English Creation Date: 02/25/2012 18:36:07 EST
Journal (Journal - Electronic) text; unmediated; volume (New York, N.Y. : New York Law Journal, 1888-) ISSN: 0028-7326
Modification Date: 04/14/2022 12:29:08 EDT
Record number: (OCoLC)2255104

Physical **Electronic (1)** Digital Other details

Interface Name	Collection Name	Service Type	Availability	Portfolio
Factiva	Factiva	Full Text	Active	View

[Portfolio List](#)

2 **New York law journal [microcard]** [Display in Discovery](#) [Order](#) ...

MMS ID: 991031375936804646 Medium Type: microcard Creation Date: 01/12/2020 06:05:26 EST
Book (Book - Physical) text; unmediated; volume (New York : New York Law Journal Publishing Co.) Modification Date: 07/25/2021 14:25:08 EDT
Record number: (NJR)48334-01ruIsLinst

Physical (1) Electronic Digital Other details

3 **New York law journal [microfiche]** [Display in Discovery](#) [Order](#) ...

MMS ID: 991031349360604646 Medium Type: microfiche Creation Date: 01/12/2020 05:41:07 EST
Book (Book - Physical) text; unmediated; volume (New York : New York Law Journal Publishing Co.) Modification Date: 07/26/2021 11:15:30 EDT
Record number: (NJR)44000-01ruIsLinst

Physical (1) Electronic Digital Other details

CZ Metadata Changes to Make Yourself

You can edit most metadata fields. There are just a few exceptions:

- Some fields cannot be added to CZ records because they are for institution or platform-specific information: 856, many 9XX fields
- 022 field (ISSN) cannot be added or edited because it is so important for linking (request edits from ExL instead)

Be sure to make changes useful for all Alma users, regardless of institution or provider. Some examples of good edits to make yourself include adding or correcting:

- Subtitles
- Author, editor, and other contributor information
- Publication information (location, publisher, year, etc.)
- Edition information
- Tables of Contents
- Standard subject headings
- Correct identifiers (such as ISBNs)
- ISBD punctuation
- Subfield indicators

CZ Metadata Changes not to make

Changing a CZ record for one work into a different work

Changing a CZ record for one edition into a different edition

Removing valid identifiers, as they may be used for link resolver linking and as matchpoints in record loads and analyses

Adding platform or institution-specific information

CZ Metadata Changes to Request from Ex Libris

File a Support ticket to request:

- 022 (ISSN) additions and corrections

- Merging of duplicate CZ records for same ebook

- Correction of a CZ record that mixes metadata for different resources

- Correction of metadata error occurring across many records that will require batch action

Recording institution-specific information for
CZ resources

Using Local Extensions for Institution-Specific Information

Local Extensions are fields you add to a CZ record that are only visible to users at your institution.

Example Use Cases:

- A database offers multiple modules, and you want to list just the ones your institution purchased
- You would like to add local subject headings
- You would like to add a local call number
- You would like to add a note explaining how this resource is especially relevant to your community

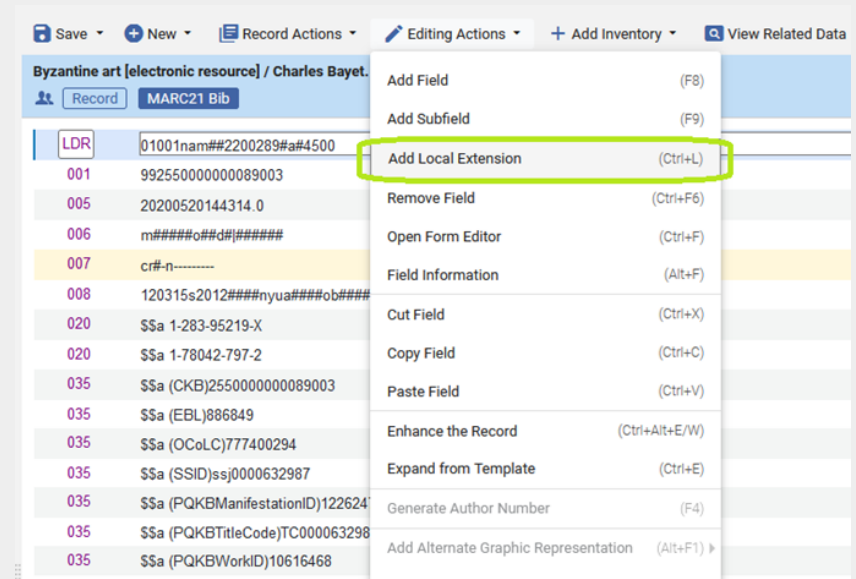
Which fields can be added as Local Extensions?

As shown in [Knowledge Center Documentation](#):

Format	Fields
MARC21	77X/78X, 09X, 59X, 69X, and 9XX
KORMARC	009, 77X/78X, 09X, 59X, 69X, and 9XX
UNIMARC, CNMARC	0X9, 1X9, 2X9, 3X9, 4X9, 5X9, 6X9, 7X9, 8X9 and 9XX

How to add local extensions

- Open a CZ record in the metadata editor
- In the Editing Actions menu, select “Add Local Extension”
- The new field will appear with an institution icon next to it
- Add your field and save and release the record.
- You can also use normalization processes to maintain local extensions
- You can also add Local Extensions in the Repository, Update Inventory, and New Order import profiles



Local Extensions IZ View

- We purchased several modules on the Audio Digest platform. Other libraries may have purchased different modules. We want to add local extensions to show our users exactly which modules we purchased.
- We activated the Audio Digest Database collection from the Alma CZ
- In the CZ MARC record, we added 590 fields as local extensions listing the modules we have purchased
- The local extension fields are published to our institution's Primo.
- When viewing the record in our IZ, the institution icons show which fields are local Extensions.

The screenshot shows the ExLibris Record View interface. The top navigation bar includes the ExLibris logo, a search icon, and dropdown menus for 'All titles' and 'MMS ID'. A dark sidebar on the left contains navigation icons for Alma Production, Market, Acquisitions, Resources, Admin, Analytics, Discovery, and Fulfillment. The main content area is titled 'Record View' and has tabs for 'MARC' and 'BIBFRAME'. The record is displayed in MARC format with the following fields:

LDR	00414nac 2200169 u 4500
001	997471009900041
005	20220518200816.0
008	170212s xx 000 0 mul
245	00 a Audio-Digest
246	10 a Audio digest
246	_ a AudioDigest
300	_ a Collection
300	_ a Database
590	_ a Audio Digest - Anesthesiology
590	_ a Audio Digest - Internal Medicine
590	_ a Audio Digest - Obstetrics & Gynecology
590	_ a Audio Digest - Orthopedics
590	_ a Audio Digest - Otolaryngology
590	_ a Audio Digest - Psychiatry
650	_0 a Medicine.
650	_0 a Medical education.
710	2_ a Audio Digest Foundation.
904	00 a (CKB)611396678000041

Local Extensions CZ View

•When viewing the record in the CZ, we do not see our local extensions.

•Other Alma libraries using this CZ record do not see our local extensions either. Our local extensions are only visible in our IZ and in our Primo.

Alma
Production

Market

Acquisitions

Resources

Admin

Analytics

Discovery

Fulfillment

< Record View

MARC

BIBFRAME

LDR	00414nac 2200169 u 4500
001	997471009900041
005	20220518200816.0
008	170212s xx 000 0 mul
245	00 a Audio-Digest
246	10 a Audio digest
246	_ a AudioDigest
300	_ a Collection
300	_ a Database
650	_0 a Medicine.
650	_0 a Medical education.
710	2_ a Audio Digest Foundation.
904	00 a (CKB)6113966780000041

Using Electronic Collection & Portfolio fields for institution & platform-specific information

Some information is specific to your institution and to a specific platform or provider, and it is thus best stored in the Electronic Collection or Portfolio:

- Number of simultaneous users
- Special authentication instructions

Contributing Content (portfolios & collections) to the Alma CZ

Most CZ content is managed by Ex Libris

Most CZ Electronic Collections are created and maintained by Ex Libris from provider-supplied title lists (typically, KBART files).

When Ex Libris loads the KBART file into Alma, its rows match to CZ records and create portfolios attached to them.

Ex Libris loads updates from providers on a regular basis (typically monthly).

To request a change to one of these collections, contact Ex Libris (and the provider too, supplying your Ex Libris ticket number).

Contributing Electronic Portfolios and Collections

Ex Libris offers a couple ways for libraries to contribute content to the Alma CZ.

You can contribute, update, or delete any portfolio in the 5 **Community-Managed Electronic Collections** in the Alma CZ:

- Free E-Journals
- Miscellaneous Ejournals
- Miscellaneous Free eBooks
- Miscellaneous eBooks
- U.S. Government Documents

Unlike most Alma collections, these collections aren't based on a provider's title list. They contain resources from various providers.

You can contribute an entire electronic collection to the Alma CZ. This is called a **Community-Contributed Electronic Collection**.

Differentiating between Community-Managed and Community-Contributed Collections

The 5 **Community-Managed** collections are managed portfolio by portfolio by the Alma Community.

- Alma users may contribute, update, and request deletion of any portfolio in these collections, including those contributed by other libraries.

A **Community-Contributed** collection is managed by the Alma library that contributed it.

- Only the library that contributed the collection can add, update, and delete the collection's portfolios.
- Use case: a library wants to share its own institutional digital collection.

Ex Libris Support has been retrained, and Knowledge Center documentation updates are pending

In August 2022, Ex Libris will introduce a new CZ field that will show each CZ collection's type.

Contributing, Updating, and Deleting Portfolios in Community-Managed Collections

Alma users with portfolio-editing permissions may, within Alma (without filing a Support ticket):

- Contribute new portfolios
- Update existing portfolios, including those contributed by other libraries

Alma users may request deletion of portfolios by filing a Support ticket. Beginning with the August 2022 release, users will be able to delete portfolios within Alma without filing a Support ticket.

Before making changes, check the collection scope, and make sure the changes you make will be beneficial for all libraries.

See [Knowledge Center documentation](#) for more detailed steps.

The key step to contributing and updating portfolios: The “Contribute” row action in the Portfolios tab of the Service editor

Activation Service Description Linking Portfolios Notes History

1 - 1 of 1 Title Jahrbuch der österreichisch

Link Local Portfolios to Community Move Set of Portfolios Activate/Deactivate Load Portfolios Add Delete Selected

Status: All CZ Linking: All COUNTER Platform: All

	Availability	Title	Identifier	Coverage	Perpetual Coverage	Material Type	MMS ID		
1	<input type="checkbox"/>		Jahrbuch der österreichischen Byzantinistik.	0378-8660	Available from 2003.	-	JOURNAL	991031229146604646	...

- Edit
- Move
- Delete
- View
- Test access
- Deactivate
- View in search
- Contribute
- View hidden

Publisher Site

Collection ID
61467300130004646

Electronic collection allowed for

Service type
Full Text

Service ID
62467300120004646
View all services

Provider package code (DB ID)
-

MMS ID
991031072607004646

Electronic collection allowed for



Dispelling a Myth about Community-Managed Collections

Myth: If you contribute a portfolio, you are the only user who can update it. If another Alma library notices that an update should be made, they have to contact you to request the update.

Fact: Any Alma user with portfolio-editing permissions can update any contributed portfolio from within the Alma interface. Ex Libris Support will not update a contributed portfolio, but Alma users can!

Creating and Updating a Contributed Collection

Useful for cases where you have unique free local content you would like to share.

Start by organizing your local portfolios into a local electronic collection.

In the Electronic Collection Editor, use the “Contribute to Community” button to contribute your collection to the CZ. Your collection will be added to the CZ with status “In Review.” Ex Libris will check the collection linking and verify it isn’t in the CZ already.

After you contribute the collection, the “Contribute to Community” button becomes an “Update in Community” button. After you make changes locally, use this button to push the changes to the CZ.

Your institution will be responsible for updating the collection; other libraries will not be able to add, update, or delete portfolios.

See [Knowledge Center Documentation](#) for more detailed steps.

The key step: The “Contribute to Community” button in the Electronic Collection Editor

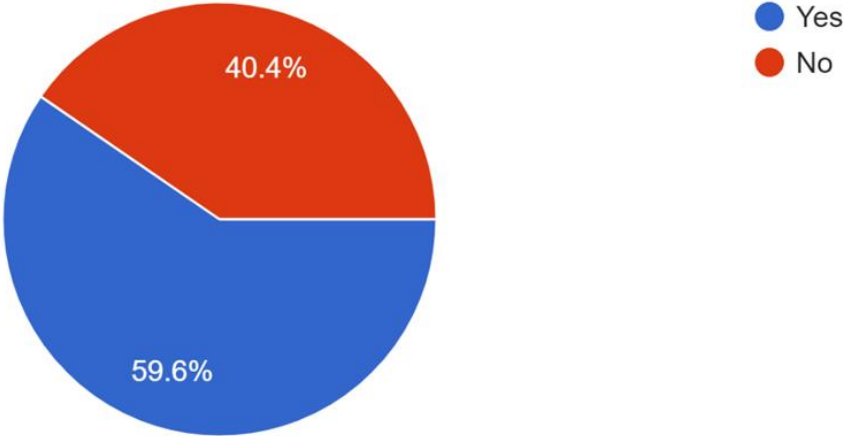
The screenshot shows the ExLibris Electronic Collection Editor interface. At the top, there is a navigation bar with the ExLibris logo, a search bar, and various utility icons. Below the navigation bar, the main header reads "Electronic Collection Editor". A green box highlights the "Contribute to Community" button, which is positioned next to "Cancel" and "Save" buttons. The main content area is divided into tabs: "Electronic Collection Description", "General", "Additional", "Notes", "History", and "CDI". The "General" tab is active, showing several input fields: "Public name" (filled with "Rutgers University Libraries Free Digital Content"), "Public name (override)" (empty), "Description" (empty), "Internal description" (filled with "Collection created to hold portfolios that link to Rutgers University Libraries digital content and projects. We are not actively adding to this"), and "Library" (filled with "Rutgers Digital Library"). On the right side, a summary panel displays the following information: "Collection name: Rutgers University Libraries Free Digital Content", "Collection ID: 61575373190004646", and "Provider package code (DB ID): -". Below this information are two links: "View Full Text Service" and "View Full Text Portfolios". A vertical sidebar on the left contains navigation icons for "Alma Production", "Market", "Acquisitions", "Resources", "Admin", "Analytics", and "Discovery".

CZMG Community Survey: Summer 2021

- We wanted to learn whether and how community members edit CZ records
 - Identifier fields that may affect link resolver functionality
 - Local information
- 141 total responses
- Results inform ongoing discussion with Ex Libris:
 - Restricting certain fields
 - Clean up of inaccurate identifiers

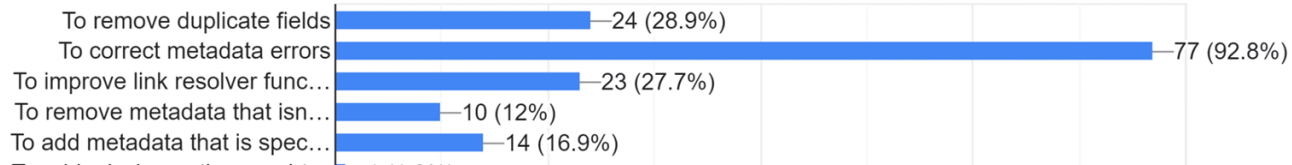
Do you ever make changes to Community Zone bibliographic records?

141 responses



For what purposes do you edit/change CZ records? Choose all that apply.

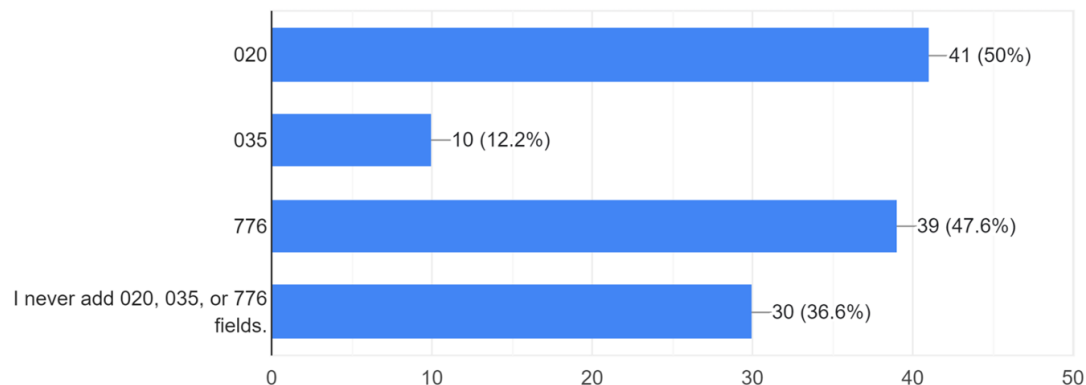
83 responses



- Of the 83 respondents who answered this question, the vast majority (92.8%) do so to correct metadata errors.
- About 29% remove duplicate fields.
- About 28% make changes to improve link resolver functionality.
- 12% remove metadata that isn't relevant to their institution.
- Other reasons: adding alternate and former titles, dates of publication, ISBN, Open Access designation (506), LCSH, and MeSH.

Do you ever ADD any of the following fields? Choose all that apply.

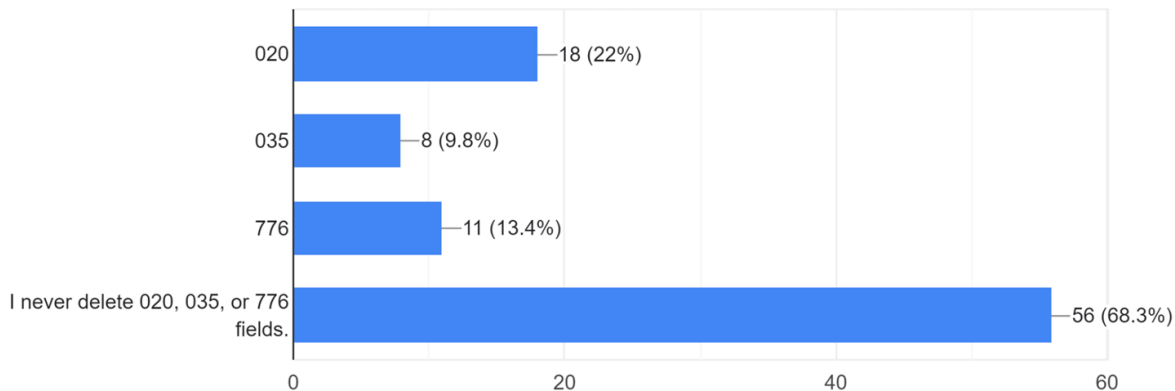
82 responses



- Many respondents indicated that they add these fields when identifiers are missing, without providing specific situations when they would do so.
- Circumstances in which respondents add these fields:
 - 020 and/or 776 to match CDI article metadata to fix link resolver failures.
 - 020 when 13-digit ISBNs are not present in the record
 - 776 for print version ISBNs.
 - 020 and/or 776 to improve dedup and/or FRBR in Primo.
 - 776 \$w for print version OCLC numbers, while removing those from 035 \$a.

Do you ever DELETE any of the following fields? Choose all that apply.

82 responses

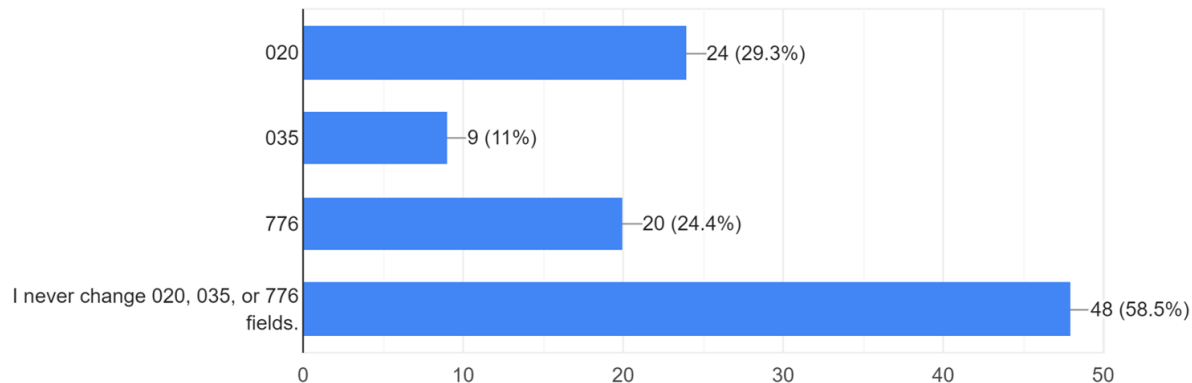


- Most respondents indicated that they only delete these fields if the identifiers are verifiably incorrect.
- Circumstances in which respondents delete these fields:
 - 035 fields with OCLC numbers if they are for print version records.
 - 020 and/or 776 if identifiers in those fields are causing inaccurate link resolution from CDI records.
 - 776 if it can be determined that it is contributing to inaccurate Primo FRBR/dedup.

Do you ever CHANGE the content of any of the following fields when they are already present?

Choose all that apply.

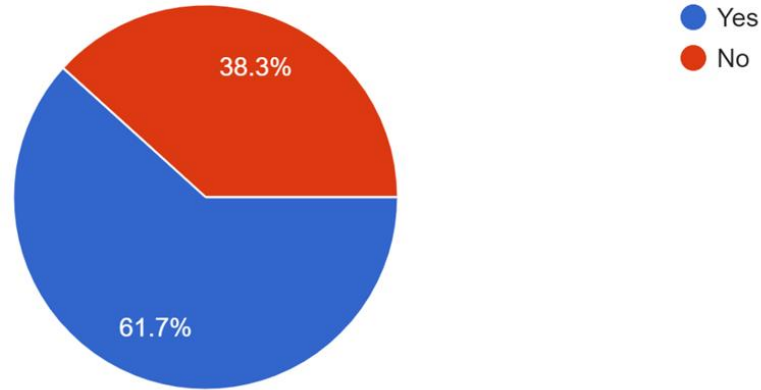
82 responses



- As above, respondents indicate they generally change these fields when identifiers are verifiably incorrect.
- Reasons for editing: to distinguish print version and e-version identifiers, or to fix link resolver failures

2. Do you report problems with CZ records to Ex Libris via Salesforce cases?

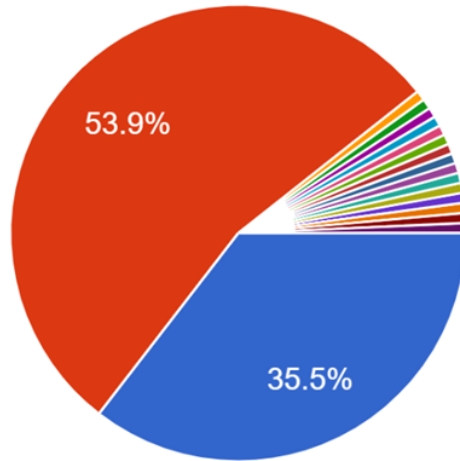
141 responses



- Reasons for reporting:
 - duplicate records.
 - incorrect or missing ISSNs in 022 fields.
 - problems in unprotected fields (rather than making corrections themselves).
 - print version records that are being used to represent electronic versions.
 - CONSER records that have not been updated in the CZ.
 - serial title changes or closed titles.
 - language of cataloging was changed from English to another language.

Do you use OCLC numbers in 035 fields of CZ records (when available) for any workflows or processes?

141 responses



- Yes
- No
- No, because they are often incorrect (...)
- When importing records I ignore cz re...
- Not for my job.
- I'm not entirely sure but I think our imp...
- We generally try not to use nor rely on...
- I would not delete information that is t...

▲ 1/3 ▼

OCLC numbers in CZ records

- Many use OCLC numbers as a secondary element for manual matching and enrichment.
- Some use OCLC numbers to identify duplicates in their own collections.
- Some have used CZ OCLC numbers for OCLC Datasync to set OCLC holdings.

- Some noted that they are not reliable enough to serve as a sole match point.
- Many expressed frustration at the prevalence of print-version OCLC numbers in CZ records.
- Some intentionally remove CZ OCLC numbers from records sent to OCLC to set holdings.
- Several stated that their institutions or consortia rely heavily on OCLC numbers, and are frustrated by both the inaccuracy of CZ OCLC and the lack of OCLC numbers for all records.
- Some respondents requested the removal of print version OCLC numbers from CZ records.

- This is clearly a major pain point.

List of Useful Links

Community Zone Serial Record Enrichment

- https://knowledge.exlibrisgroup.com/Alma/Content_Corner/Knowledge_Articles/Community_Zone_Serial_Records_Enrichment

Local Extensions

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Metadata_Management/040Working_with_Bibliographic_Records/070Working_with_Local_Extension_Fields_for_Community_Zone_Records](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Metadata_Management/040Working_with_Bibliographic_Records/070Working_with_Local_Extension_Fields_for_Community_Zone_Records)

Contributing to the Community Zone–Portfolios

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/040Contributing_to_the_Community_Zone_%E2%80%93Portfolios](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/040Contributing_to_the_Community_Zone_%E2%80%93Portfolios)

Contributing to the Community Zone–Local Electronic Collections

- [https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_\(English\)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/030Contributing_to_the_Community_Zone_%E2%80%93Local_Electronic_Collections](https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/Electronic_Resource_Management/030_Working_with_Local_Electronic_Resources/030Contributing_to_the_Community_Zone_%E2%80%93Local_Electronic_Collections)

Thank You!