Semi-automated catalog management:
Making de-duplication a part of your eResources workflow

Katie Peterson
University of Iowa Libraries
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<table>
<thead>
<tr>
<th>Central Knowledge Base</th>
<th>Alma</th>
<th>FOLIO</th>
<th>WorldShare</th>
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<tbody>
<tr>
<td>Community Zone</td>
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<td>eHoldings app</td>
<td>WorldCat Knowledge Base</td>
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<td>Analytics tool</td>
<td>Alma Analytics</td>
<td>FOLIO Analytics</td>
<td>WorldShare Reports</td>
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Alma Community Zone

Institution Zone (IZ)
- Local Portfolio
- Local Portfolio
- CZ Portfolio
- CZ Portfolio

Community Zone (CZ)
- CZ Portfolio
- CZ Portfolio
- CZ Portfolio
- CZ Portfolio
<table>
<thead>
<tr>
<th>MMS Id</th>
<th>Material Type</th>
<th>ResourceType</th>
<th>945</th>
<th>Title (Filing)</th>
<th>OCLC Control Number (035a)</th>
<th>Uniform Resource Identifier</th>
<th>Subjects</th>
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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
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
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.
The process:

3) Alma adds the textbooks to the CZ

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

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.

<table>
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<tr>
<th>Title</th>
<th>Author</th>
<th>Publication Date</th>
<th>MMS Id</th>
<th>Portfolio Linked To CZ</th>
<th>Local Param 02</th>
<th>Electronic Collection Public Name</th>
<th>Portfolio URL</th>
</tr>
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</table>
The report:

Ensures that resources appearing are current

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

Selects which collections to look at

Filters

Electronic Collection Id is equal to /is in /51489869000002771; 51489860320002771; 61486857710002771

AND

Lifecycle is equal to /is 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 "hit" THEN SUBSTRING("Portfolio URL Information" "Portfolio Parser Parameters" FROM 6)) WHEN '3-s' THEN https://www.clinicalsearch.com/#/browse/book/1 SUBSTRING("Portfolio URL Information" "Portfolio URL Information" "Portfolio URL 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 "hit" THEN SUBSTRING("Portfolio URL Information" "Portfolio Parser Parameters" FROM 5)) WHEN '3-s' THEN https://www.clinicalsearch.com/#/browse/book/1 SUBSTRING("Portfolio URL Information" "Portfolio URL Information" "Portfolio URL Information" "Portfolio Parser Parameters" (override) 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
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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