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A bookmarklet based application to interface the Alma Metadata Editor with the IdRef Authority Web application

The ULiège Library experience

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Session Abstract

ULiège Library has been working with IdRef French authority file for name and subject access since 2021. In order to improve the cataloguing workflow, we searched for a way to integrate the Alma MDE with the IdRef search and cataloguing Web application. The developed bookmarklet based application allows cataloguers to launch a search in the IdRef Web application from a bibliographic Marc21 record opened for editing in the Alma MDE, and to import the retrieved authorized form, its identifier, and URI in the record. It makes it also possible for cataloguers to easily create new authority records in the IdRef Web application by pre-filling the input fields with the metadata from the record in Alma. Moreover, cataloguers can submit requests for authority record creation, modification, or deduplication. Finally, moving to IdRef led us to change the linking method from text matching to ID matching, employing a large number of batch alignment tasks.

Context

Context

- 1,7 million bibliographic records
- LMS: Alma since 2015
- Discovery tool: Primo VE
  - Library main catalog: https://lib.uliege.be
- Large heritage collections since the University's foundation (1817)
  - More than 44,000 items in our rare books and special collections
  - Specific Primo view: Legito https://lib.uliege.be/legito
- Marc21 format
  - Until early 2021, few local authority records created in Alma: minimal records just for disambiguation

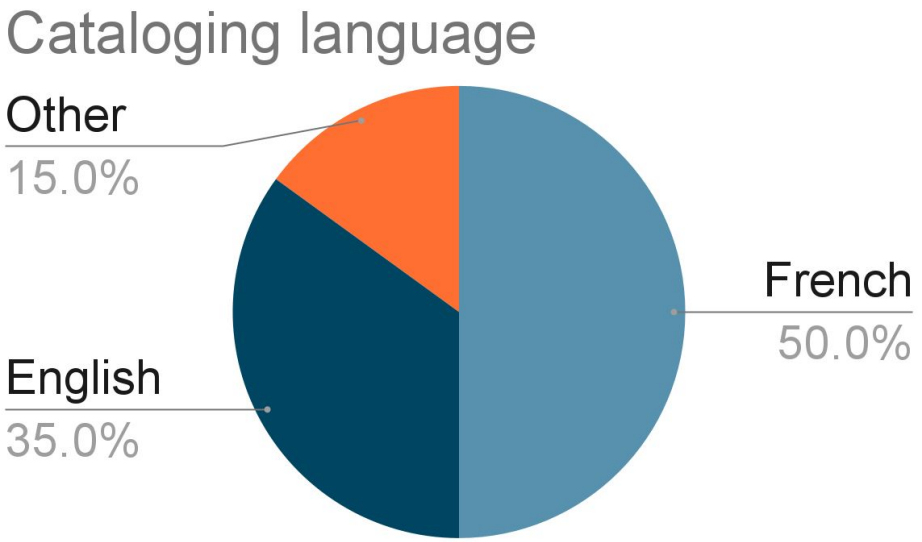
Context

- Our main Authority file for Names, Titles and Subject authority control in Alma: **IdRef** (2021-). Example: https://www.idref.fr/111043654
  - from Abes (*Bibliographic Agency of Higher Education*), France
  - integrated in Marc21 format in Alma CZ (since August 2020)
  - updates every 6 hours (OAI-PMH) in Alma CZ
- For Abes foreign partners:
  - production environment accessed from IdRef web interface
  - interface used by Swiss and Belgian libraries for authority records creation and enhancement
- Alma MD Editor + IdRef cataloging interface = two separate environments

→ We looked for an efficient way to work to interconnect both

Context

- Linking configuration based on **Originating System ID**:
  - changed in Feb. 2023
  - previous configuration was **text-based**
    - wrong links due to
      - system changes (and authority file changes)
      - lack of control
      - automatic linking jobs…
- A “French language-oriented” cataloging



Objectives

What about data enrichment?

- Benefit of few Alma “linked data enrichment”: *limited to some vocabularies*
- Look up to Alma Refine: tests made with the Bibliothèque nationale de France (BnF) and the French union catalog SUDOC (2020)
  - not related to authority control
    - can’t be part of a mandatory cataloging workflow
  - not easily usable
    - response time sometimes very long
    - no external link to the source record
    - no way to identify entities with certainty (just the heading, no access to other information from source authority records)

What about data enrichment?

- For **Names**, **Titles** and **Subjects**

- Batch and manual enrichments in bib records: **adding IdRef IDs and URIs** (2021–)
  - IDs: for authority control
  - URIs: external link in discovery
    => just what we can do *for now*

manual enrichment with
our bookmarklet based application

- Batch and manual enrichments in bib records: adding IDs for other vocabularies (LCSH, MESh, FAST)

record ID added with
Alma F3 in MDE

Improving cataloging workflow

- Two types of catalogers:
  - **Bibliographic catalogers** = catalogers who just use existing IdRef authorities
  - **Authority catalogers** = catalogers who use & create or modify authority records in IdRef
    - on a voluntary basis (20 out of 47)

=> Developing a tool:

1) to provide some interoperability between Alma and IdRef (= the **bookmarklet**)
2) to reconcile “catalogers” with “authority catalogers”: how to dispatch cataloging tasks? (= the bookmarklet + an external application named **IdRef Request**)

Goals:

- Limiting the time needed to catalog
- Adding value to the work of cataloging

What we wanted

- Starting from Alma MDE and searching the IdRef interface
  - not just a browse (like F3 in Alma MD): benefit of IdRef **search** capabilities
- An easy way to retrieve the authorized form, ID and URI in Marc21 bibliographic format
  - managing all types of access points: names, titles, subjects - with subdivisions…
- Creating and editing authority records in the IdRef cataloging application
  - with basic metadata for creation directly from the Alma bibliographic record
  - newly created records in IdRef should be usable immediately
- Bibliographic catalogers should be able to create requests for authority record creation or modification

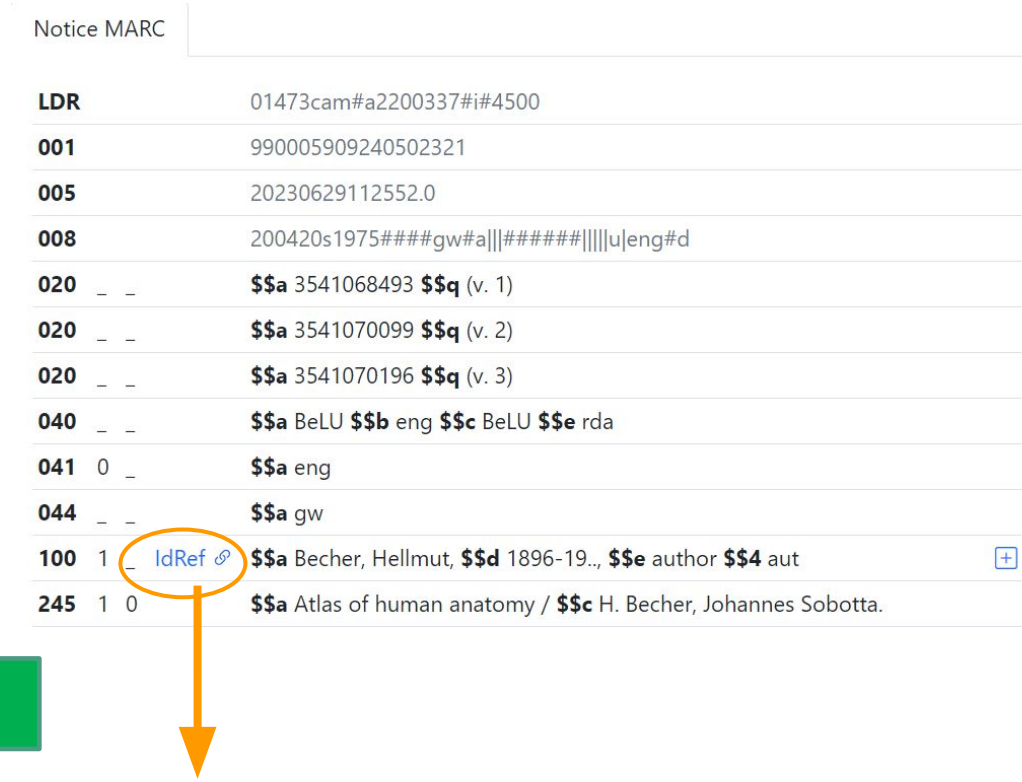
Bookmarklet & workflow

The bookmarklet based application

- Is a small JavaScript code (in the bookmark) and Perl scripts (the main application)
- Uses Alma API “Retrieve Bib” and “Update Bib record”
- Uses IdRef Interconnection processes

click-on bookmarklet

Alma API Retrieve Bib



Interconnection with IdRef

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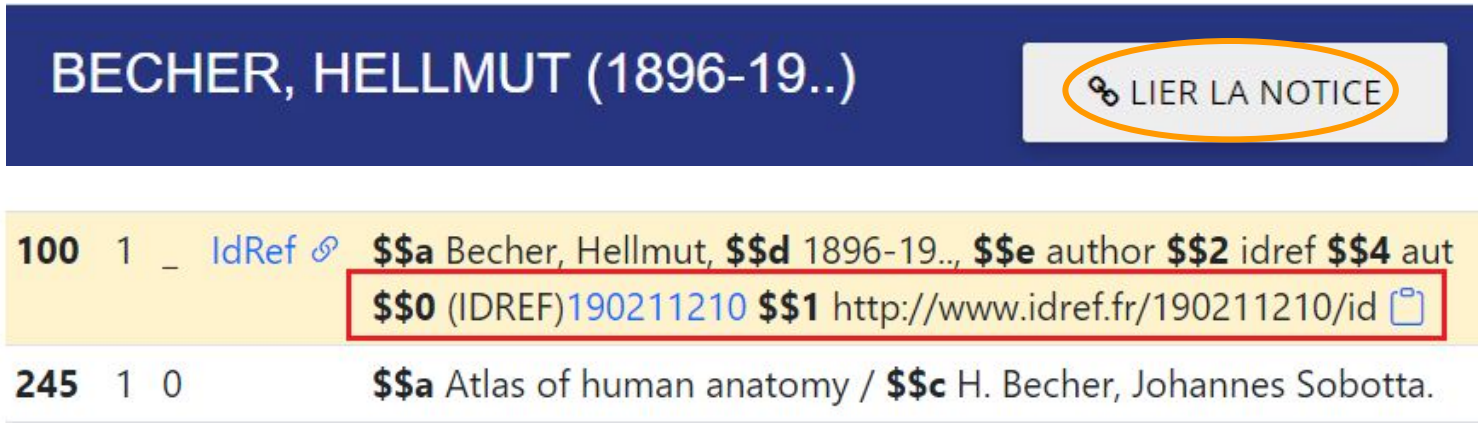
Interconnection with IdRef

Opening the IdRef iFrame



The bookmarklet connects the main application with IdRef in order to:

- send the search request
- pre-fill the input fields for a new record creation
- retrieve the whole Unimarc/Marcxml record
- convert to Marc21 via XSLT
- copy preferred form subfields
- copy record identifier and add prefix
- keep relator subfields, subfields 3 and 5 if exist + manage punctuation
- build the URI from record ID

Save and come back in Alma

100	1	_	IdRef	**$$a** Becher, Hellmut, **$$d** 1896-19.., **$$e** author **$$2** idref **$$4** aut **$$0** (IDREF)190211210 **$$1** http://www.idref.fr/190211210/id
245	1	0		**$$a** Atlas of human anatomy / **$$c** H. Becher, Johannes Sobotta.
250	_	_		**$$a** 9th english edition.
264	_	1		**$$a** München : **$$b** Urban & Schwarzenberg, **$$c** 1975.
300	_	_		**$$a** 3 volumes : **$$b** illustrations ; **$$c** 26 cm
336	_	_		**$$a** text **$$b** txt **$$2** rdacontent
337	_	_		**$$a** unmediated **$$b** n **$$2** rdamedia
338	_	_		**$$a** volume **$$b** nc **$$2** rdacarrier
505	0	_		**$$a** Volume 1, Region. Skeleton. Ligaments. Joints and muscles -- Volume 2, Visceral anatomy -- Volume 3, Central nervous system. Autonomic nervous system. Sense organs and skin, peripheral nerves and vessels.
650	_	0		**$$a** Human anatomy **$$v** Atlases. **$$0** (DLC) sh 85004840
650	_	7	IdRef	**$$a** Anatomie humaine. **$$2** idref **$$0** (IDREF)027219151 **$$1** http://www.idref.fr/027219151/id
655	_	7	IdRef	**$$a** Atlas. **$$2** idref **$$0** (IDREF)027280810 **$$1** http://www.idref.fr/027280810/id
700	1	_	IdRef	**$$a** Sobotta, Johannes, **$$d** 1869-1945, **$$e** author **$$2** idref **$$4** aut **$$0** (IDREF)034640754 **$$1** http://www.idref.fr/034640754/id

Enregistrer la notice dans Alma

Alma API Update Bib

Back in Alma MDE

Results

	100	1		$$a Becher, Hellmut, $$d 1896-19.., $$e author $$2 idref $$4 aut $$0 (IDREF)190211210 $$1 http://www.idref.fr/190211210/id
	245	1	0	$$a Atlas of human anatomy / $$c H. Becher, Johannes Sobotta.
	250			$$a 9th english edition.
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	505	0		$$a Volume 1, Region. Skeleton. Ligaments. Joints and muscles -- Volume 2, Visceral anatomy -- Volume 3, Central nervous system. Autonomic nervous system. Sense organs and skin, peripheral nerves and vessels.
	650		0	$$a Human anatomy $$v Atlases. $$0 (DLC) sh 85004840
	650		7	$$a Anatomie humaine. $$2 idref $$0 (IDREF)027219151 $$1 http://www.idref.fr/027219151/id
	655		7	$$a Atlas. $$2 idref $$0 (IDREF)027280810 $$1 http://www.idref.fr/027280810/id
	700	1		$$a Sobotta, Johannes, $$d 1869-1945, $$e author $$2 idref $$4 aut $$0 (IDREF)034640754 $$1 http://www.idref.fr/034640754/id

‘Reload Original Record’ action must be performed

Use case 1 - Linking author name and subjects fields

- Manage complex Subject headings

650 _ 7 IdRef $$a Tolérance religieuse $$2 idref $$0 (IDREF)027488659 $$1
http://www.idref.fr/027488659/id $$x 16e siècle. $$0 (IDREF)027794520 $$1
http://www.idref.fr/027794520/id

650 _ 7 IdRef $$a Liberté de conscience $$2 idref $$z Europe $$y 16e siècle.

650 _ 7 IdRef $$a Histoire religieuse $$2 idref $$z Europe $$y 16e siècle

650 _ 7 IdRef $$a Liberté de conscience $$2 idref $$0 (IDREF)027459276 $$1
http://www.idref.fr/027459276/id $$z Europe $$y 16e siècle.

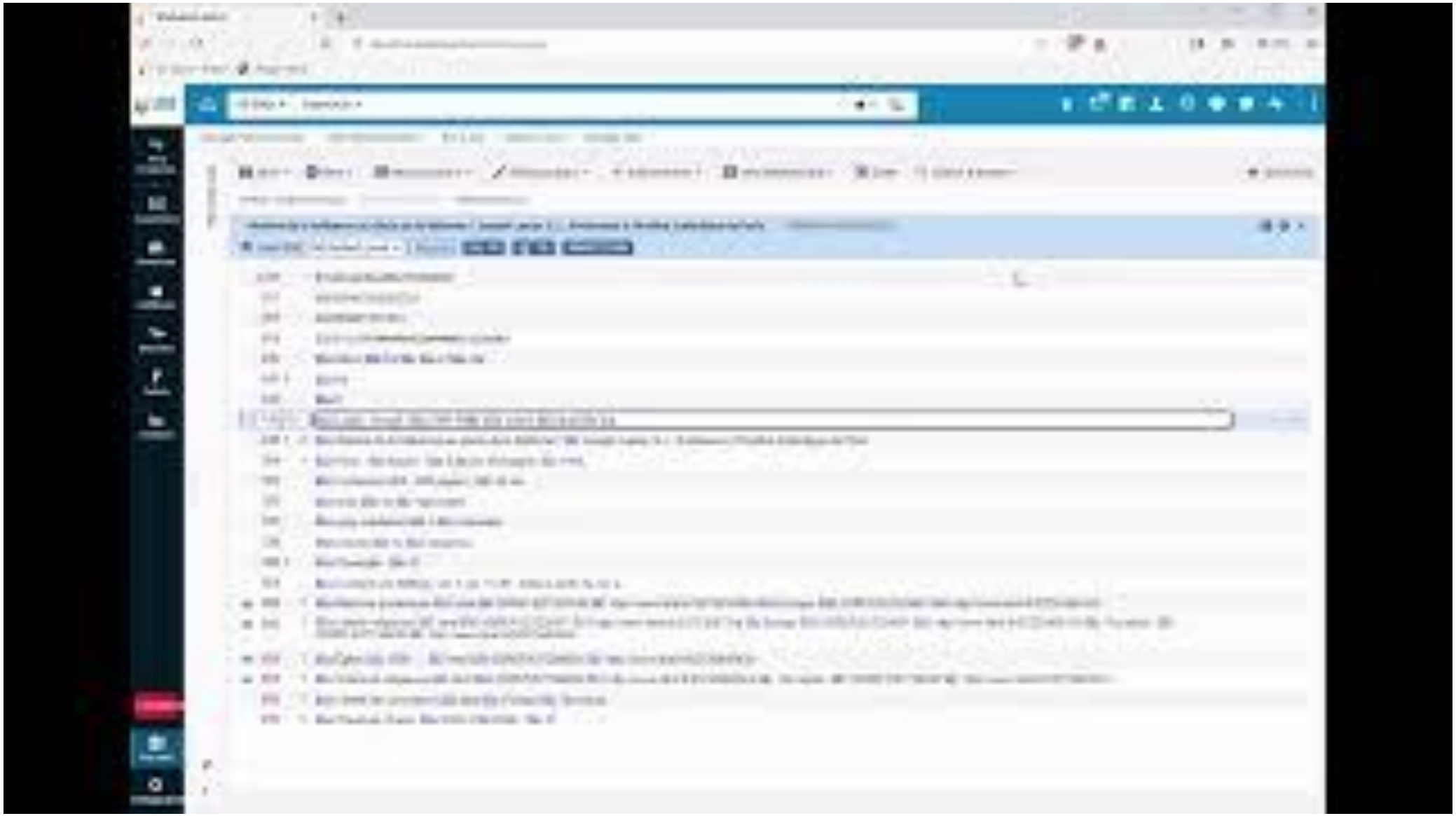
650 _ 7 IdRef $$a Liberté de conscience $$2 idref $$0 (IDREF)027459276 $$1
http://www.idref.fr/027459276/id $$z Europe $$0 (IDREF)027224651 $$1
http://www.idref.fr/027224651/id $$y 16e siècle.

650 _ 7 IdRef $$a Liberté de conscience $$2 idref $$0 (IDREF)027459276 $$1
http://www.idref.fr/027459276/id $$z Europe $$0 (IDREF)027224651 $$1
http://www.idref.fr/027224651/id $$y 16e siècle. $$0 (IDREF)027794520 $$1
http://www.idref.fr/027794520/id

- First, search on the whole field, then link what is found
- Repeat for remaining subdivision subfields: click on the “red” subfield to rerun a search, then link again

Demo - Use case 1

https://youtu.be/FIRzmiXf5sg



Use case 2 - Creating a new authority record

Authority catalogers:

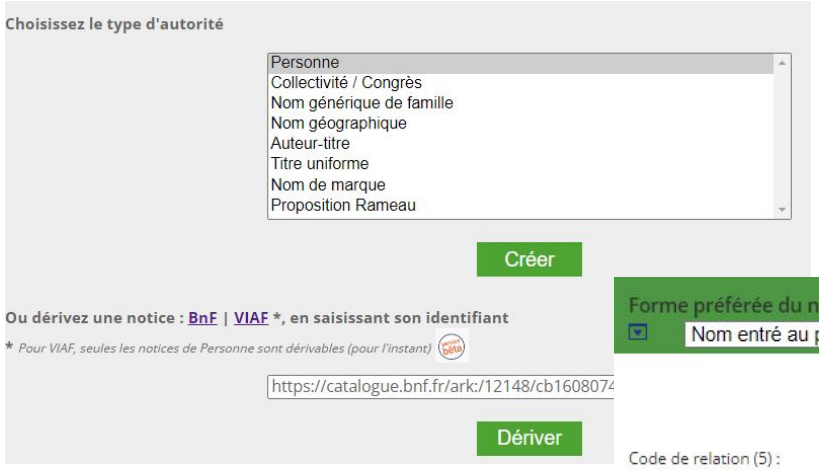
- can easily create a new authority record in IdRef
- always start from Alma MD editor

Vidéo 100 + recherche + création par formulaire
=> MMS ID 990004558210502321
https://maisondelapoesie.be/poetes-list/fallais-pierre/

No results?

1) Authenticate in IdRef
2) Create new record

Use case 2 - Creating a new authority record

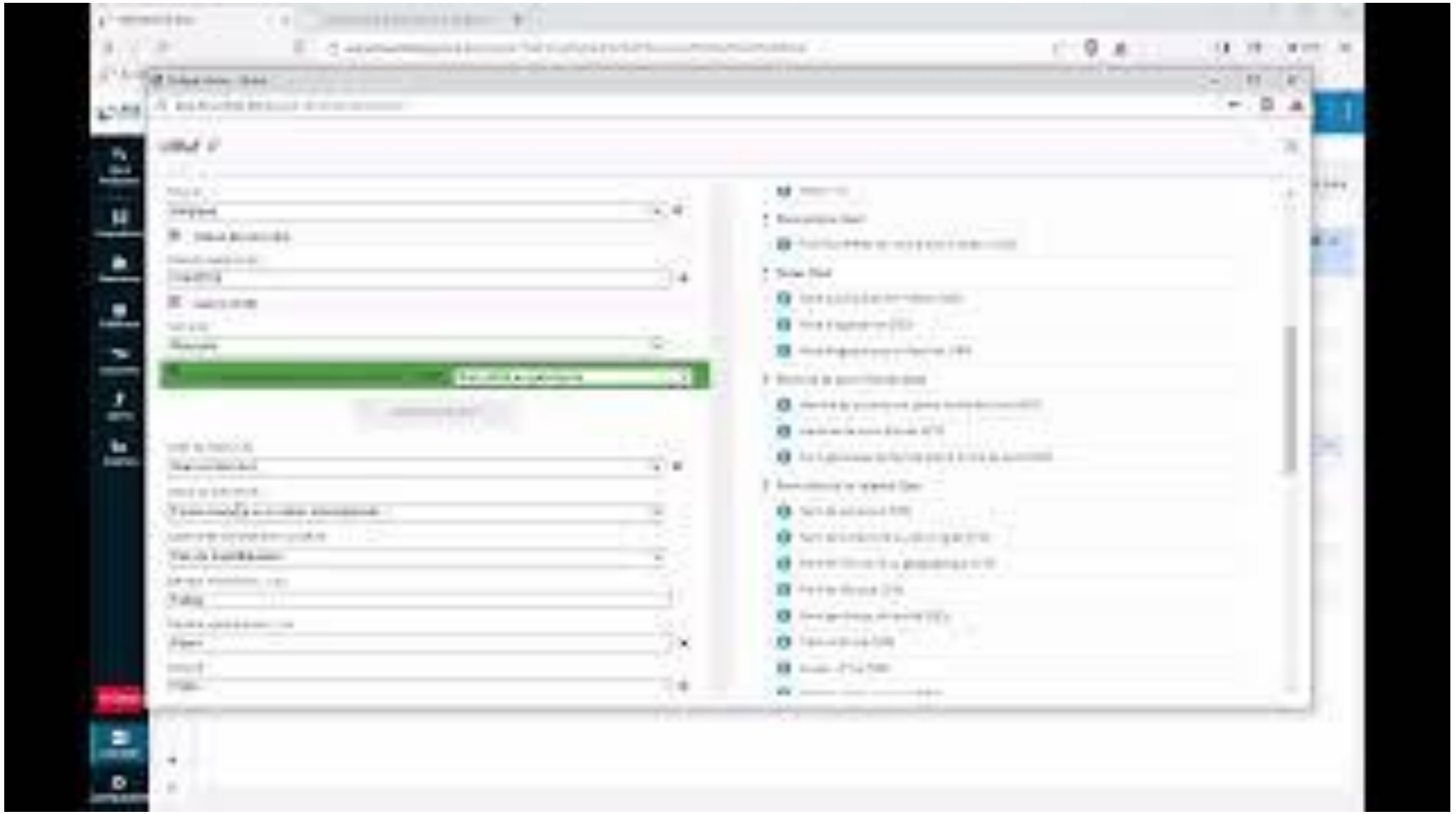


IdRef cataloging form (in Unimarc)

- Metadata can be retrieved from bibliographic record or the new authority record can be derived from BnF or VIAF
- Link the record:
  - Bibliographic record is immediately updated with authorized access point, ID and URI
- Authority control in Alma must wait for the next IdRef harvesting in CZ

Demo - Use case 2

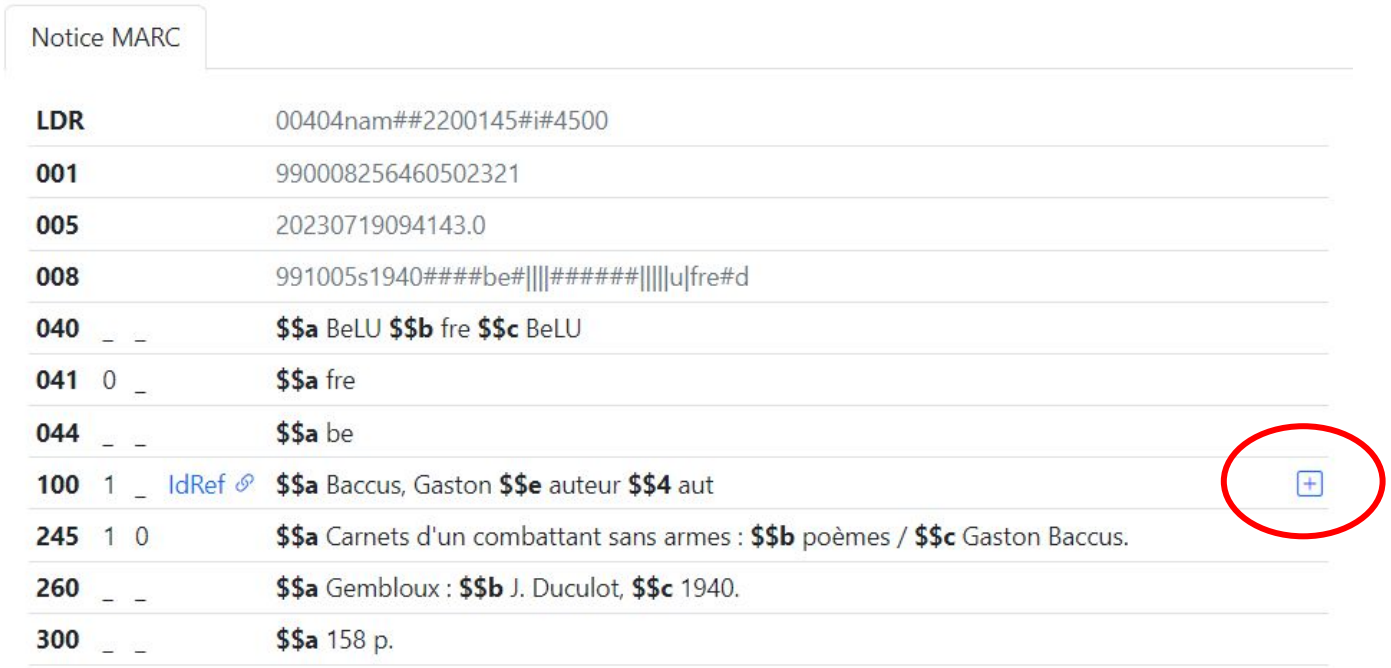
https://youtu.be/awFe6mJd5-M



Use case 3 - Request for creation

No results in IdRef?

- Catalogers can request au new authority record to be created in IdRef



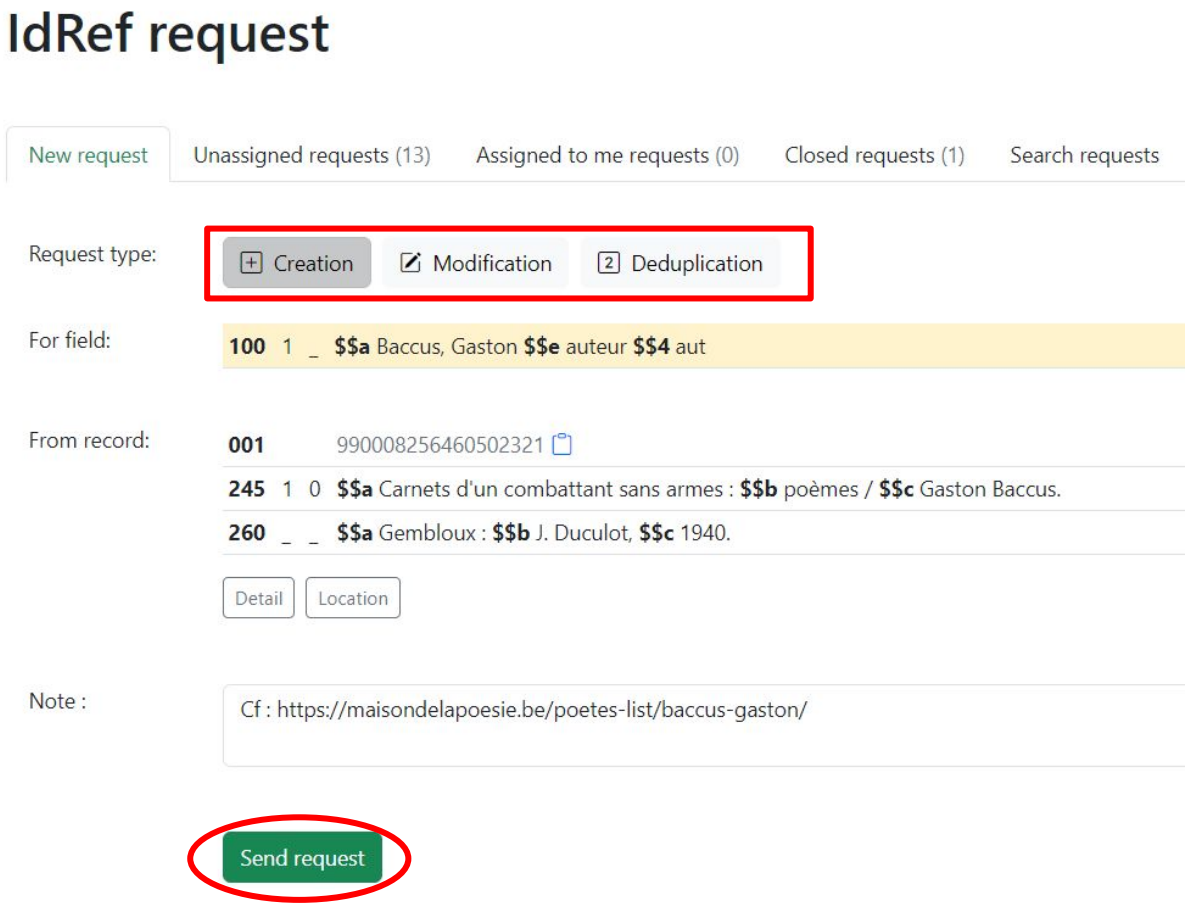
Use case 3 - Request for creation

Bibliographic catalogers can:

- request creation of a new record
- request enhancement of an existing record
- report duplicates

Authority catalogers can:

- consult the application
- self-assign requests
- activate the bookmarklet from the record in Alma MDE
- create new authority record in IdRef
- update bib record in Alma



Demo - Use case 3

https://youtu.be/Jco6F4LBATM

Findings & conclusions

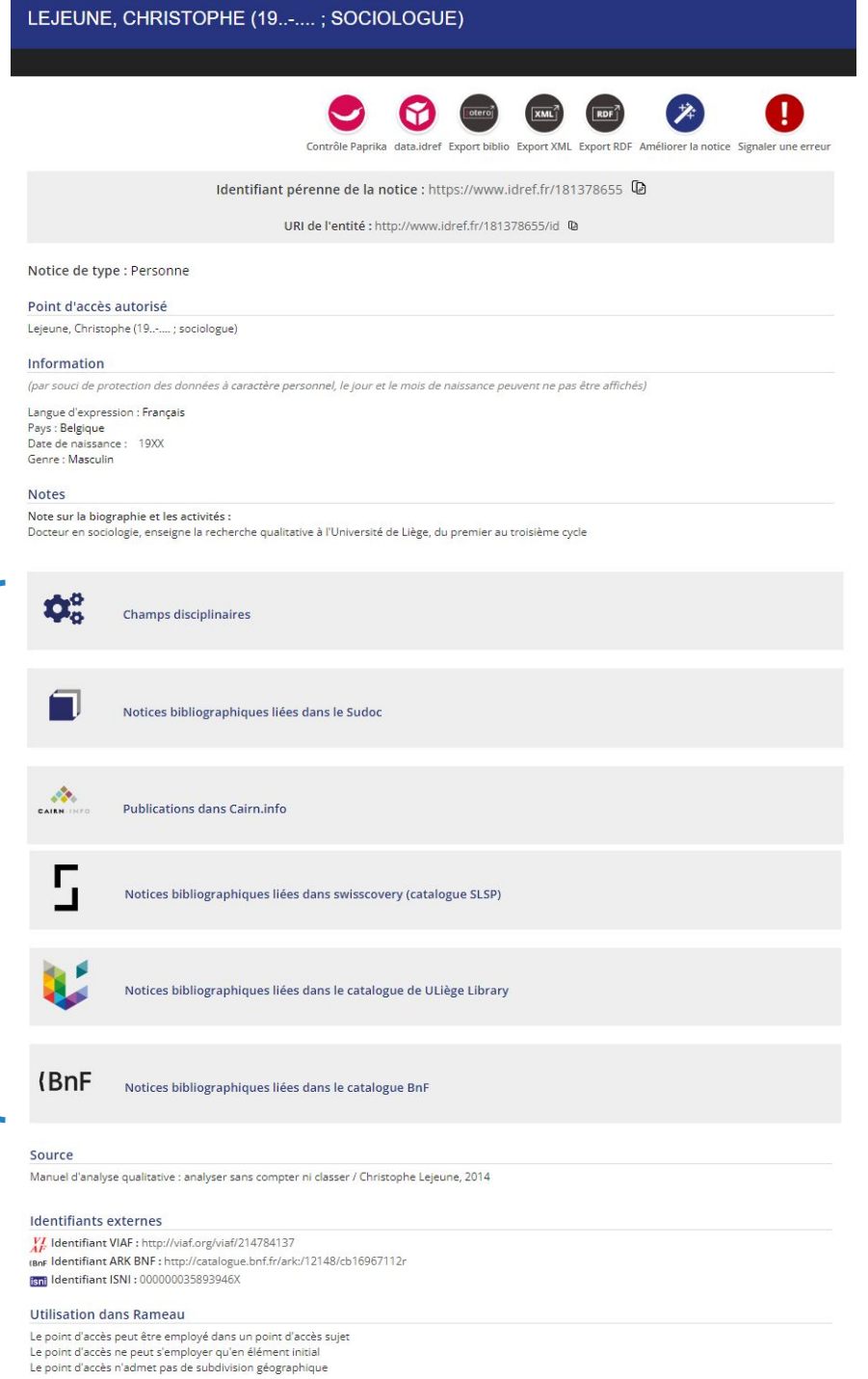
Figures

Staff with Cataloger role in Alma (not full time cataloging!)	47
Authority “IdRef” catalogers	20
IdRef Authority records created by ULiège in IdRef web interface (From scratch and copy-cataloging from BnF or VIAF) *(from Nov. 2021-)*	6,297
IdRef Authority records created by ULiège (Marc21 field 065) in Alma CZ (From scratch only)	4,950
IdRef Authority records created by other institutions and modified by ULiège *(from Nov. 2021-)*	1,363
Local application: Requests for creation, modification or merge *(from April 2022-)*	1,530
Bibliographic records in Alma with at least one IdRef ID (1XX, 6XX or 7XX fields)	497,057

Figures as of Sept 4, 2023

Findings & conclusions

- Easy to search for and to identify entities in IdRef
- Tool appreciated by catalogers:
  - search in IdRef
  - linking IdRef/Alma records
  - management of subdivisions
  - creation of new entities
  - requests (creation, update, duplicate management)
- **Increased visibility** of our catalog data
- Bookmarklet can be reused by other Alma/IdRef institutions



http://www.idref.fr/181378655/id

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Findings & conclusions

ENCOUNTERED ISSUES

- Some harvesting issues between the IdRef database and Alma CZ
  - no link between Alma CZ and the bib record

Thank you!

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