

Working with IdRef Authorities within Alma and Primo

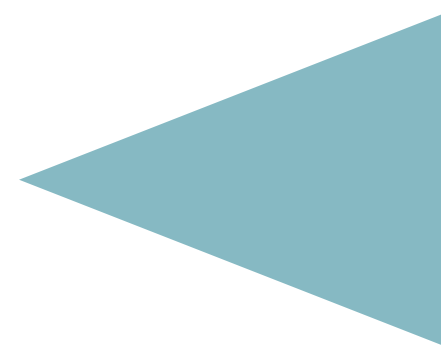
“Meet our Staff” Erasmus week 2025

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Abstract

In this session, we'll present our IdRef Project and the Alma-IdRef integration workflow set up. We'll also focus on authorities cataloguing task and how we manage it.



IdRef: What is it?



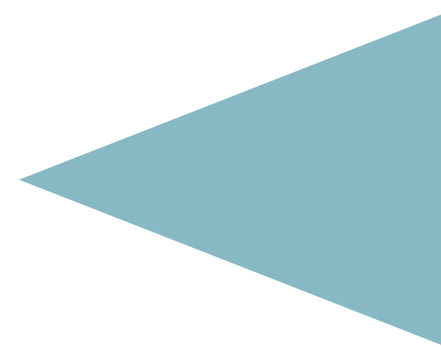
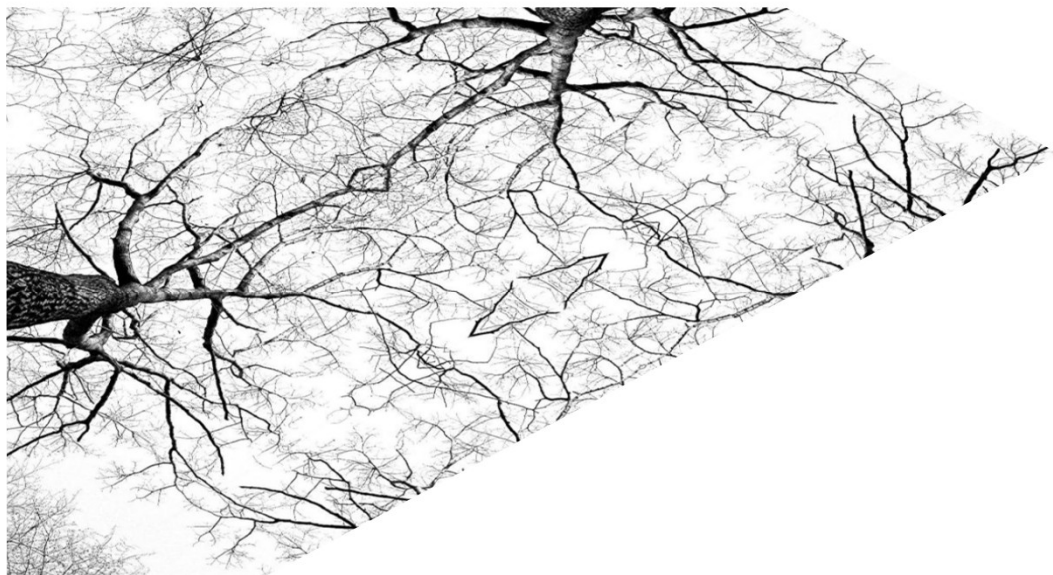
IdRef: What is it?

- ❑ IdRef = Identifiants et Référentiels (Identifiers and Authority Files)
- ❑ IdRef = an Authority file created by the French Bibliographic Agency of Higher Education (Abes)
- ❑ IdRef = a public interface that allows users to consult authority records produced by institutions that are members of the French Higher Education and Research library networks (Sudoc for french universities libraries catalogs, Calames for Archives and Manuscripts and Star for thesis)
- ❑ IdRef with authentication = a cataloguing module that is available as a stand-alone cataloguing tool



IdRef: What is it?

- ❑ Alma Community Zone:
 - ❑ Electronic resources
 - ❑ Authority files
 - ❑ Harvested if in Marc format
 - ❑ IdRef: in Marc21 in the CZ since summer 2020
 - ❑ Unimarc to Marc21 mapping by Abes
- ❑ IdRef contains authority records for:
 - ❑ Names of persons, families, corporates and meeting
 - ❑ Titles, trademarks, geographical names
 - ❑ Topical term and Genre/form term = RAMEAU
 - ❑ No creation for topical and genre/form
 - ❑ National proposal circuit



Authority control



Authority control

Before 2015, with Aleph ILS

- ❑ Highlight the importance of working with real authority files and advantage of using files with an international scope
- ❑ No tool exists at the national level in Belgium
- ❑ Choose BNF authorities for name and titles & RAMEAU for topical subject headings
 - ❑ Initial import into Aleph: local mapping from Unimarc to Marc21 (around 1,2 millions records)
 - ❑ + Monthly releases
 - ❑ Creation of local authorities if the heading was not in BNF file
 - ❑ Authority link based on text (= Marc21 standard)



Authority control

2015, Alma

- Authority file from Aleph (BNF + local creations) can't be imported into Alma
- Alma CZ = LCNAMES
- No linking at the time of Alma migration but we did many jobs on important sets of bib records
 - links were made with LCNames on our 'BNF' or local headings
 - with all the errors you can imagine



Authority control

End of 2016, Alma

- ❑ Ex Libris uploads BNF Name-title authorities and Rameau file
 - ❑ Configuration of 'priorities' which allows us to use 2 authority files for names authority control
 - ❑ But quality of records is not so good
 - ❑ Fixes are applied to new and modified records, not to the whole database
- ❑ Local authority records are still created, but creation can't be mandatory
 - ❑ Less creation
 - ❑ Sometimes less information, sources... in records
 - ❑ Create when homonyms
 - ❑ Often ends with a duplicate when BNF creates the record



Authority control

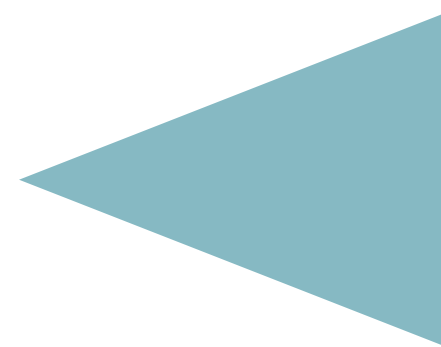
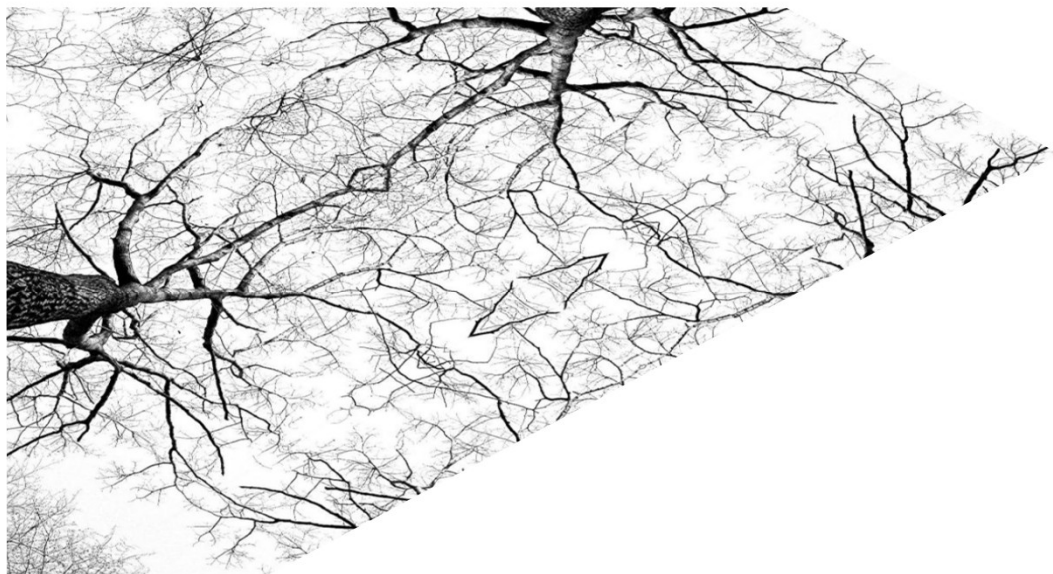
End of 2020

- ❑ First contacts with IdRef team => 3 choices will be made
 - ❑ Using IdRef in CZ Alma instead of BNF and LCNames files
 - ❑ Becoming a producer within the IdRef network
 - ❑ Enriching bib records with IdRef identifiers

- ❑ IdRef will become the main authority file for names and title access and subject headings in french at the end of 2021

Changing: why?

- Opportunity to produce in an (inter)national reference file:
- not only local anymore
 - increased visibility (of authority data & the whole catalogue with the SRU search from IdRef interface)
 - focus on Belgian authors, ULiège researchers, heritage informations...
 - updated 4/day in CZ



IdRef project



IdRef project

- ❑ Emerging issues
 - ❑ **How to manage creation in IdRef in the most efficient way?**
 - ❑ **How to update our data to incorporate the IdRef identifiers?**
 - ❑ The project involves moving from text-based authority linking to identifier-based linking
 - ❑ **How to display in IdRef interface our data from bibliographic records?**
 - ❑ **Is the catalog the only repository that can be matched with IdRef data?**
 - ❑ **Staff training**



IdRef project

(1) How to manage creation in IdRef in the most efficient way?

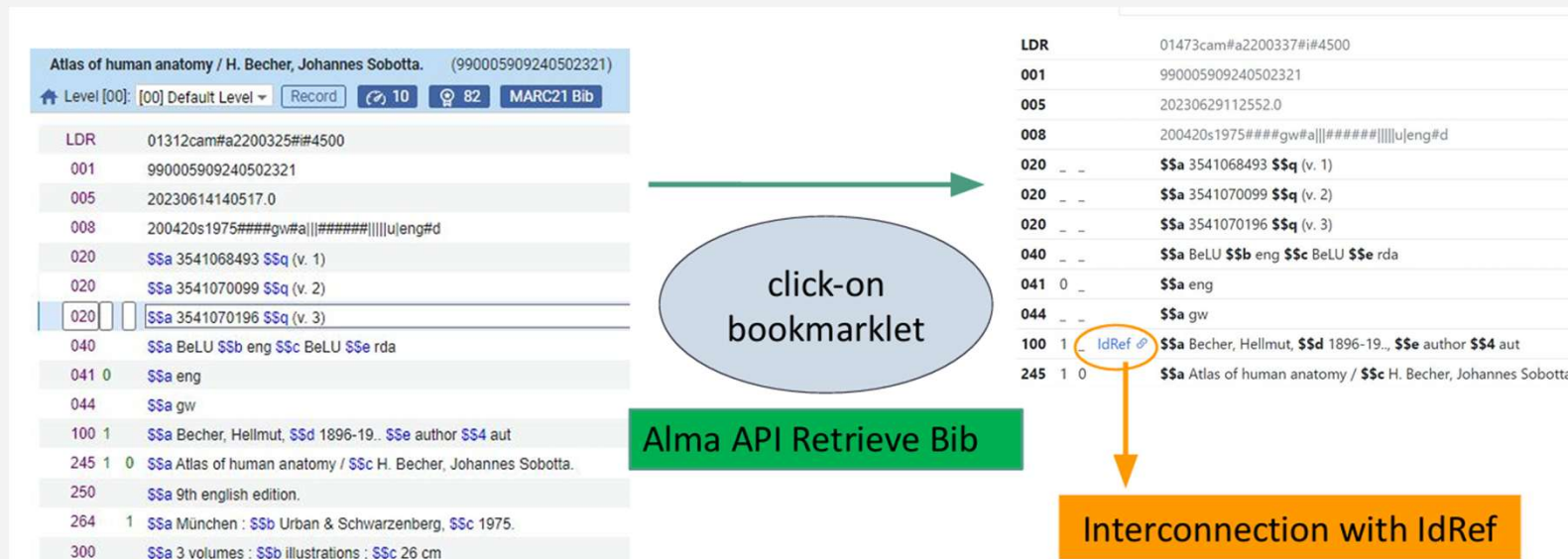
- ❑ Find a way to connect the Alma metadata editor with the IdRef web interface
- ❑ Easy linking with IdRef authority record
 - ❑ We retrieve from IdRef the exact form for access points in Marc21 format, the IdRef ID and URI
- ❑ Improved workflow for creation and enhancement of authority records in the IdRef web professional interface
 - ❑ Basic metadata for creation come directly from the Alma bibliographic record
- ❑ Newly created records in IdRef must be usable immediately

Objective: Limiting the impact on cataloguing time

Alma/IdRef plugin



- ❑ JavaScript code (in the bookmark)
- ❑ Perl scripts for the main application
- ❑ Uses Alma API “Retrive BIB” and “Update BIB record”
- ❑ Uses IdRef Interconnection processes





Alma/IdRef plugin

SEARCH

Opening the IdRef iFrame

Type d'autorité

- Nom de personne
- Nom de collectivité
- Congrès
- Nom commun

Termes de recherche

BECHER, HELLMUT (18

100	1	_	IdRef	\$a Becher, Hellm
245	1	0		\$a Atlas of hum

100 1 _ IdRef \$a Becher, Hellm \$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



Alma/IdRef plugin

The Application connects to 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
- build the URI from record ID

The screenshot shows a library catalog record with the following fields highlighted in green:

- 100 1 \$a Becher, Hellmut, \$d 1896-19... \$e author \$2 idref \$4 aut <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 \$a Anatomie humaine. \$2 idref <http://www.idref.fr/027219151/id>
- 655 7 \$a Atlas. \$2 idref <http://www.idref.fr/027280810/id>
- 700 1 \$a Sobotta, Johannes. \$d 1869-1945, \$e author \$2 idref \$4 aut <http://www.idref.fr/034640754/id>

A blue callout box on the right side of the record states: "Reload Original Record" action must be performed

IdRefApp for creation, enhancement and deduplication requests

245 1 0 **\$\$a** Mémorial de l'Exposition universelle et internationale de Liège en 1905 / **\$\$c** édité par Charles Piron.

700 1 **\$\$a** Piron, Charles **\$\$e** éditeur intellectuel **\$\$4** edt

Alma Bib record: 700 field heading not linked to any authority record

700 1 _ [IdRef](#) **\$\$a** Piron, Charles **\$\$e** éditeur intellectuel **\$\$4** edt



IdRef search:
no results

0 RÉSULTAT

Nom de personne=Piron, Charles

Request

Nouvelle demande

Demandes non assignées (10)

Assignées à moi (0)

Clôturées (0)

Rechercher des demandes

Demande de :



Création



Modification



Dédoublonnage

248

700 1 _ **\$\$a** Piron, Charles **\$\$e** éditeur intellectuel **\$\$4** edt

001 990001516800502321

245 1 0 **\$\$a** Mémorial de l'Exposition universelle et internationale de Liège en 1905 /
\$\$c édité par Charles Piron.

264 _ 1 **\$\$a** [Lieu de publication non identifié] : **\$\$b** [éditeur non identifié], **\$\$c** 1905.



29/06/2022

15:12

Non assigné

Me assigner

Assigner à ..

Détail

Localisation

Note



IdRef project

(2) How to update our data to incorporate the IdRef identifiers?

The project involves moving from text-based authority linking to identifier-based linking

- ❑ Current cataloguing task
 - ❑ Identifier and URI are added within the search process in CZ authority file: ID comes directly from authority record while URI is added by a Linked data enrichment process.
 - ❑ Identifier and URI can be added with the Alma/IdRef application
 - ❑ Most records come from french SUDOC catalogue: Marc21 export includes identifiers and RWO URIs
- ❑ Batch jobs on existing records
 - ❑ Alignment with the tool BIBLIOSTRATUS: alignment tool on bibliographic records from BNF and Sudoc that allows to retrieve IdRef data
 - ❑ Reconciliation process with OpenRefine



IdRef project

At present:

- ❑ Field 100 (main entry): 805.000 records
 - ❑ Number of IdRef: 426.550 hits
- ❑ Field 700 (added entry): 481.286 records
 - ❑ Number of IdRef: 224.165 hits

Next step:

- ❑ Restart a bulk alignment with the help of Abes:
 - ❑ We send our bibliographic records, and they handle the alignment
 - ❑ Then, we just have to re-import into the system
 - ❑ But not so simple: we get an Excel file with one line per alignment, and we have to return a full MARCXML record.



IdRef project

(3) How to display in IdRef interface our data from bibliographic records

- Configuration of our SRU server
- Set up a local search field in Primo configuration

The screenshot displays the IdRef interface for the profile of HALKIN, LÉON ERNEST (1906-1998). The interface includes a navigation bar with a 'Précédent' button and a row of icons for various export and control options: Contrôle Paprika, data.idref, Éléments EAD, Export biblio, Export XML, Export JSON, and Export RDF. Below this, the 'Identifiant pérenne de la notice' is shown as <https://www.idref.fr/0100000958100502321>.

The main content area is divided into two columns. The left column contains the following information:

- Notice de type : Personne
- Point d'accès autorisé: Halkin, Léon Ernest (1906-1998)
- Information: (par souci de protection des données à caractère personnel, les données relatives à la vie privée de la personne sont masquées)
- Langue d'expression : Français
- Pays : Belgique
- Date de naissance : 11 / 05 / 1906
- Date de mort : 19 / 12 / 1998
- Genre : Masculin
- Notes: Note publique d'information : Professeur d'histoire à l'Université de Liège

The right column features a 'Catalogues de bibliothèques' section with two links:

- Notices bibliographiques liées dans le Sudoc
- Notices bibliographiques liées dans le catalogue FRANTIQ

Below this, a section titled 'Notices bibliographiques liées dans le catalogue ULiège Library' shows '244 références ULiège Library : Tout voir dans ULiège Library'. The first 10 references are displayed:

(affichage limité aux 10 premières références)

- 990010049930502321 (1536-1986) : dix conférences sur Erasme : Eloge de la folie, Colloques : actes des journées organisées par l'Université de Bâle et le Centre culturel suisse, à Paris, les 11 et 12 avril 1986 / textes réunis par Claude BLUM, avec la collaboration de Jean-Claude MARGOLIN, préface de Léon-Ernest HALKIN. Paris : Editions Honoré Champion, 1988. Genève : Slatkine, 1988.
- 990000958100502321 A l'ombre de la mort / Léon-Ernest Halkin, préface de François Mauriac. Bruxelles : Pauli, [1965].
- 990005735760502321 A l'ombre de la mort / Léon-Ernest Halkin, préface de François Mauriac. Gembloux : J. Duculot, 1965.
- 990009656270502321 A l'ombre de la mort / Léon-Ernest Halkin, préface de François Mauriac. Tournai-Paris : Casterman, 1947.
- 990006148730502321 Algemene geschiedenis der Nederlanden. 011. Deel 11 : nieuwste tijd : socioculturele geschiedenis 1794/1795 - circa 1840, politieke geschiedenis 1794/1795 - 1840/1846, de Nederlandse koloniën 1795-1914 / sous la direction de Walter PREVENIER, sous la direction de Léon-Ernest HALKIN, rédigé par M. G. Elisabeth VENEKAMP, sous la direction de D. P. BLOK. Weesp : Fibula-Van Dishoeck, 1983.
- 990006285930502321 Algemene geschiedenis der Nederlanden. 015. Deel 15 : nieuwste tijd : de tweede wereldoorlog, het economische leven 1945-1980, het maatschappelijk-politieke leven 1945-1980, het socio-culturele leven 1945-1980, de




IdRef project

(4) Is the catalog our only repository that can be matched with IdRef data?

- Also harvest our IR

Publications académiques et de recherche

 Publications et communications dans ORBI

24 références ORBI :

(affichage limité aux 10 premières références)

- 316566 Halkin Léon-Ernest. La coadjutorerie des princes-évêques de Liège au XVIe siècle.
- 315735 Halkin Léon-Ernest. Le cardinal de la Marck, prince-évêque de Liège (1505-1538).
- 315731 Halkin Léon-Ernest. Histoire religieuse des règnes de Corneille de Berghes et de Georges d'Autriche, princes-évêques de Liège (1538-1557).
- 316565 Halkin Léon-Ernest. Contribution à l'histoire de Georges d'Autriche prince-évêque de Liège (1544-1557).
- 316258 Halkin Léon-Ernest. Jadin (Abbé Louis). Les actes de la Congrégation consistoriale concernant les Pays-Bas, la principauté de Liège et la Franche-Comté. 1593-1797.
- 261325 Halkin Léon-Ernest. Les archives des nonciatures: rapport au comité directeur de l'Institut historique belge de Rome.
- 316029 Halkin Léon-Ernest. Blet (Pierre). Girolamo Ragazzoni, évêque de Bergame, nonce en France. Correspondance de sa nonciature.
- 309325 Halkin Léon-Ernest. Documents et notes sur le Congrès International des Étudiants réuni à Liège en 1865.
- 309327 Halkin Léon-Ernest. Un centenaire : le Congrès international des Étudiants, Liège, 1865.
- 309331 Halkin Léon-Ernest. La section liégeoise de la Ligue de l'enseignement en 1865-1866.



IdRef project

(4) Staff Training

- Presentation of the project
- Training by IdRef team for project managers
- 10 sessions between june 2021 and october 2022
 - For 'bibliographic' cataloguers: a new authority file with own specific features and how to use it
 - For 'authority' cataloguers:
 - On a voluntary basis: only about 15 cataloguers out of about 45
 - Using IdRef cataloguing tool
 - Learning Unimarc format for authority records and becoming familiar with Abes documentation



IdRef project

- ❑ Since the end of 2021:
 - ❑ About 11,000 authority records created in IdRef by ULiège Library
 - ❑ About 2,400 modified
- ❑ What's the future of this collaboration?
 - ❑ Abes will switch to a new system in 2027/2028
 - ❑ IdRef application will disappear?
 - ❑ Can foreign partners continue producing authority data within the French authority framework? (Swiss networks and ULiège)



Thanks!