



DIY - How to integrate new libraries in your network

IGeLU, Siena, 2025-09-26

Who from SLSP is here today?

Raphaël Rey

Team Leader System
Operations



Rouven Schabinger

Senior Data and System
Specialist



swisscovery

1 NZ
31 IZs

500
Libraries

Agenda

- 1. Types of Migrations**
- 2. Planning**
- 3. Migration Process**
 - a) Preparation & Config
 - b) Deduplication
 - c) Tools
- 4. Involving Clarivate**
- 5. Conclusion**



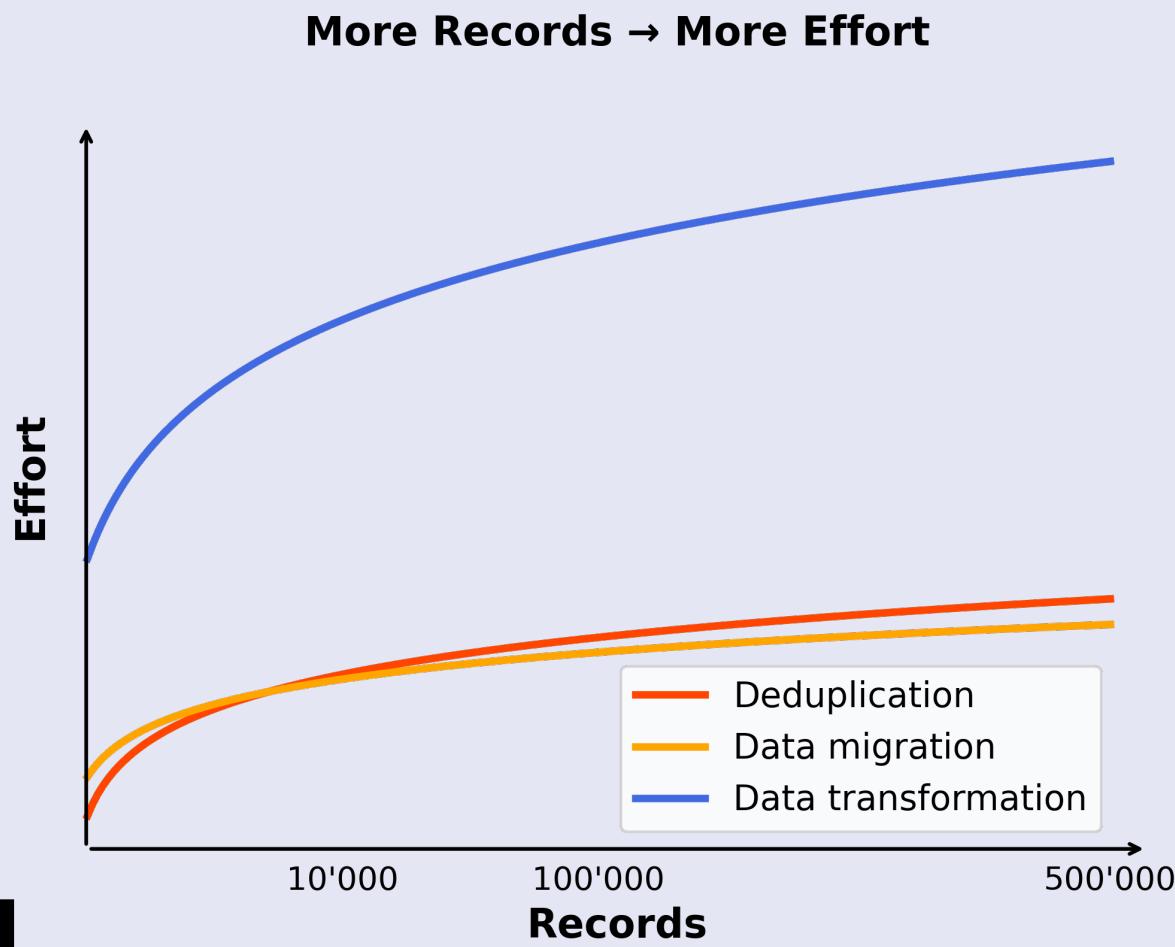
1) Types of Migrations

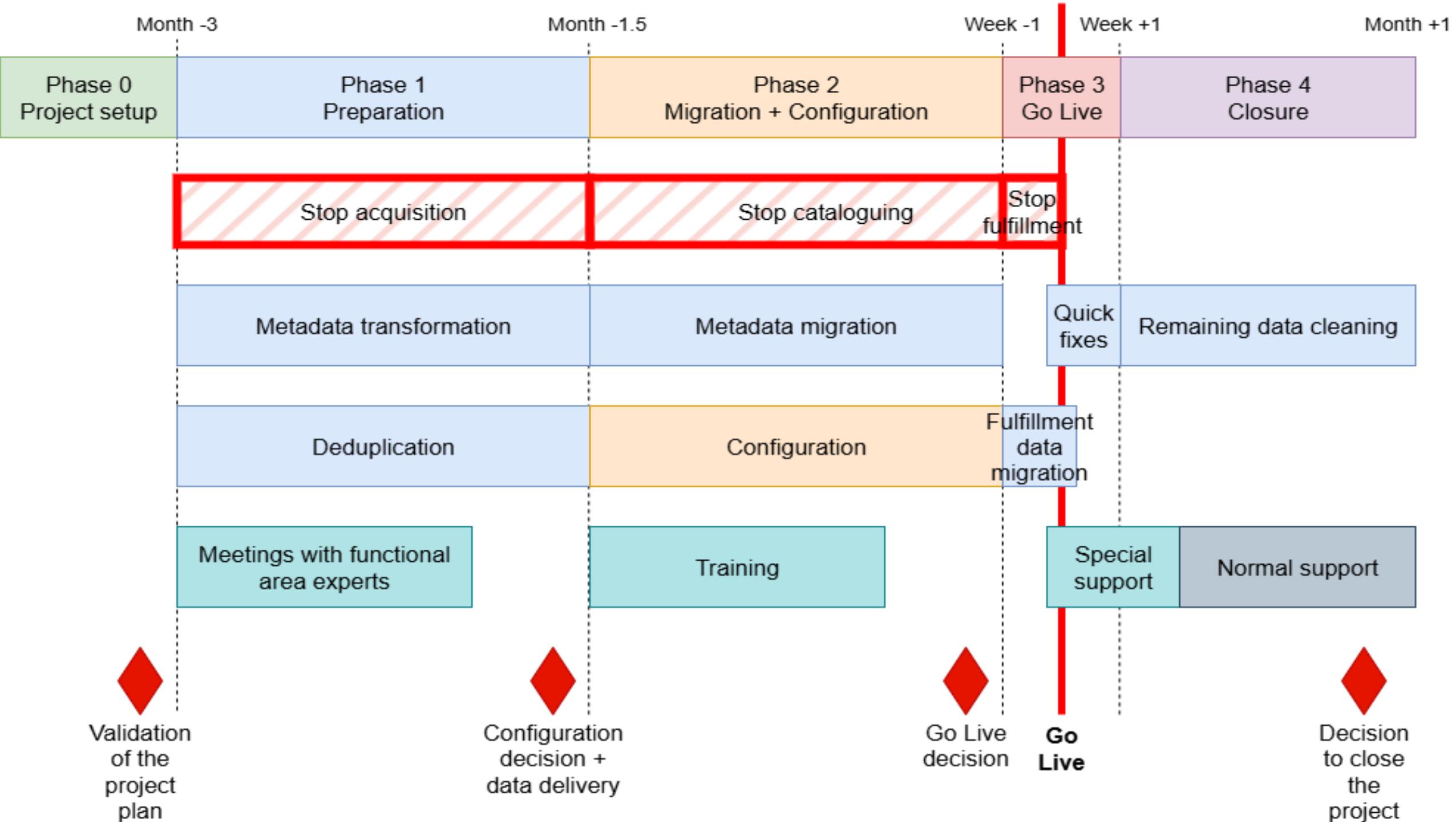
Migration typology

| Case | Description | Deduplic- ation | Support of Clarivate required | Example |
|-------------------------------------|---|--------------------|-------------------------------------|------------------------------------|
| New Alma IZ joining SLSP | IZ to be linked with NZ | Yes | Yes | <u>BVERW</u> , <u>ABN</u> |
| New Library joining SLSP | External import into IZ and shared with NZ | Yes | No | <u>CMG-HEM</u> , <u>UNILI</u> |
| IZ to IZ migration | Library data copied in another IZ | No | No | <u>HEPFR</u> , <u>Agroscope</u> |
| Merge libraries | Holdings to be relinked to the winning library | No | No | <u>LUHSW</u> and <u>LUHSA</u> |

2) Planning

General considerations





3) Migration Process

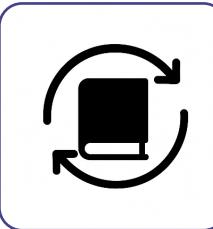
Preparation and Configuration

Acquisition data



- PO Lines
- Funds and ledgers
- Invoices
- Vendors

Fulfillment data



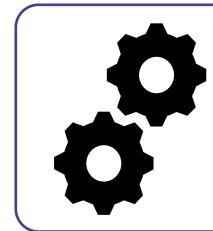
- Loans
- Requests
- Work orders
- Missing items

Bibliographic data



- Physical titles and inventory
- Digital Objects and E-resources
- Authorities
- Local extensions

Third Party Integration



- Printers and Scanners
- Self-Check machines
- Gates
- SAP

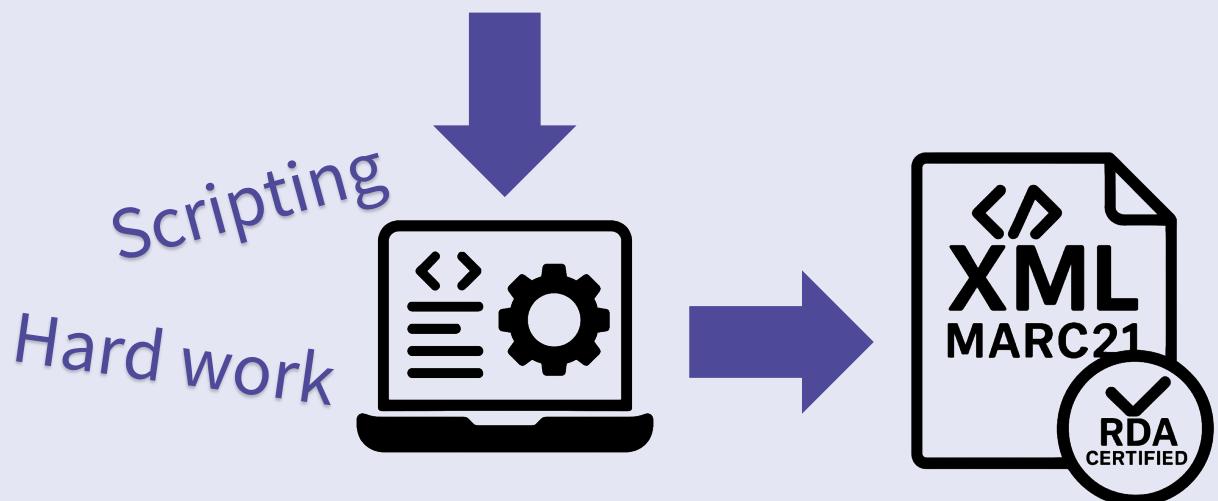
Data preparation

Initial estimation:

- Inspect data quality
- Overview per resource type:
monography, article, series ...
- Match in NZ via standard
identifier (ISBN/ISSN)

Hard question: **should we accept
data in other formats?**

```
{  
  "title": "Animal Liberation - A Graphic Guide",  
  "author": "Gruen Lori, Singer Peter, Hinde David (Illustrationen)",  
  "isbn": "978-0-948491-21-4",  
  "cover_image": "http://books.google.com/books/content?id=fp7",  
  "edition": 0,  
  "year": 1987,  
  "price": "159",  
  "abstract": "Gru - Ethik: Tierrechtsbewegung \ Aktivismus ",  
  "content": "Animal Liberation: A Graphic Guide vividly and powerfully",  
  "review": "",  
  "keywords": "Ethics Animal Rights Movement Activism Animal Liberation",  
  "contained_in": "",  
  "city_of_publishing": "London",  
  "medium_name": "Buch",  
  "publisher_name": "Camden Press Ltd",  
  "status_name": "Verf\u00fcgbar",  
  "category": "Ethik",  
  "subcategory": "Tierrechtsbewegung \ Aktivismus"  
}
```



Data transformation

Bibliographic data

- Workflows in JupyterHub
- Step by step workflow
 - Testing possible at each step
 - Repeatability
 - (test migration, prod migration, post migration)
 - Save points for important data conversions



| |
|--|
| task_00_aet |
| task_01_unili_aet_extract |
| task_02_filter_fhfh |
| task_03_filter_ress_not_migrated |
| task_04_records_items_holdings |
| task_05_filter_analytical_records |
| task_06_filter_series_records |
| task_10_create_subset_material_types |
| task_11_make_batches |
| task_12_create_concordance_list |
| task_13_bibliographic_data |
| task_17_clean_bibliographic |
| task_17_clean_bibliographic_11_7XX_mmsid |
| task_18_split_multi_item_files |

Tools

Not just one way

- Import profiles
- APIs / python scripts
- Alma Jobs
- AutoExtract Tool (AET)
- Deduplication tool
- Third Party Databases

How to decide?

- Security / reporting
- Time management (human and machine time)
- Recovery in case of failure
- Experience



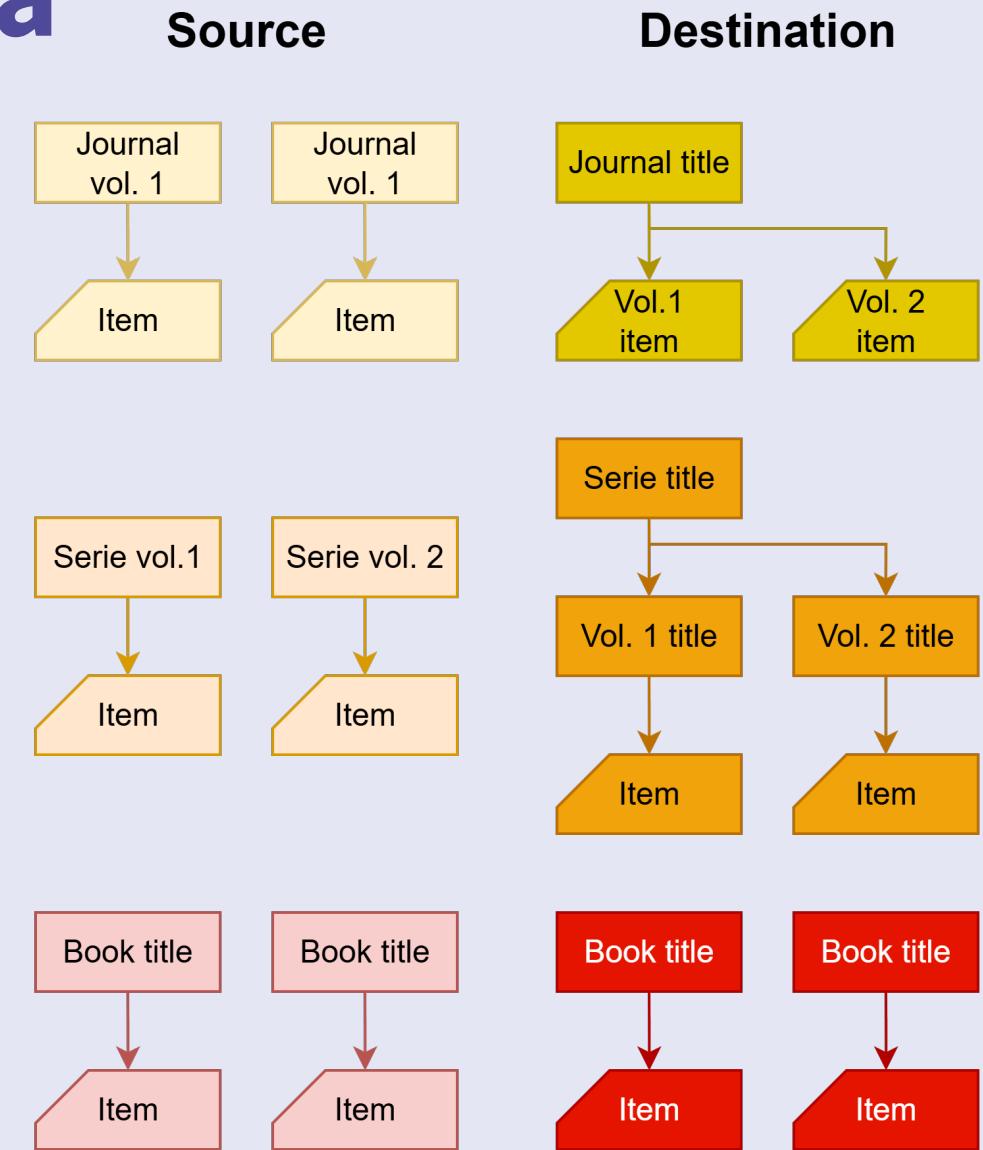
Find your own strategy

Challenges in metadata to be migrated

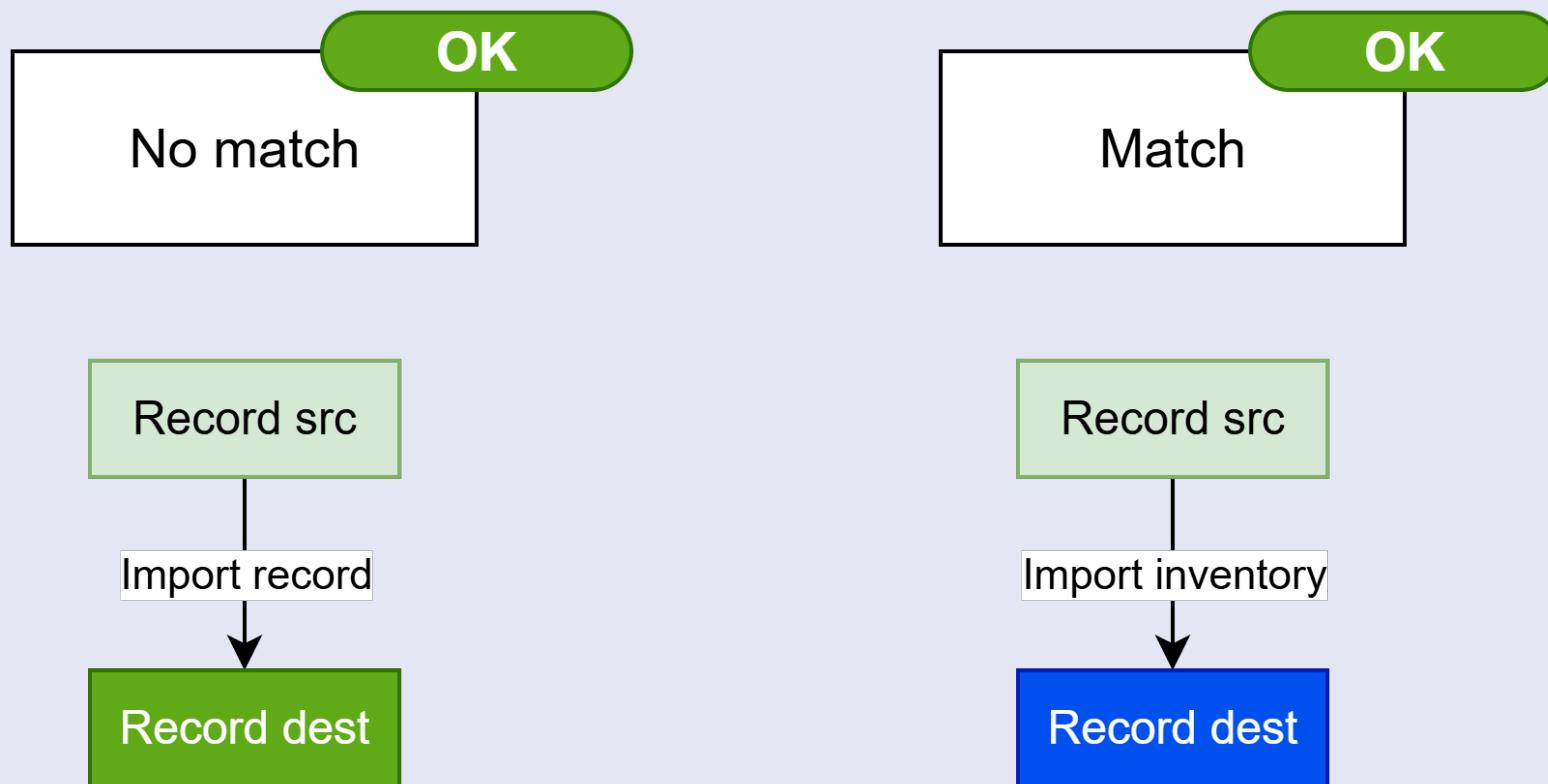
- Multipart volumes
- Continuing resources (journals vs series)
- Analytical records
- “Bound with” volumes

L

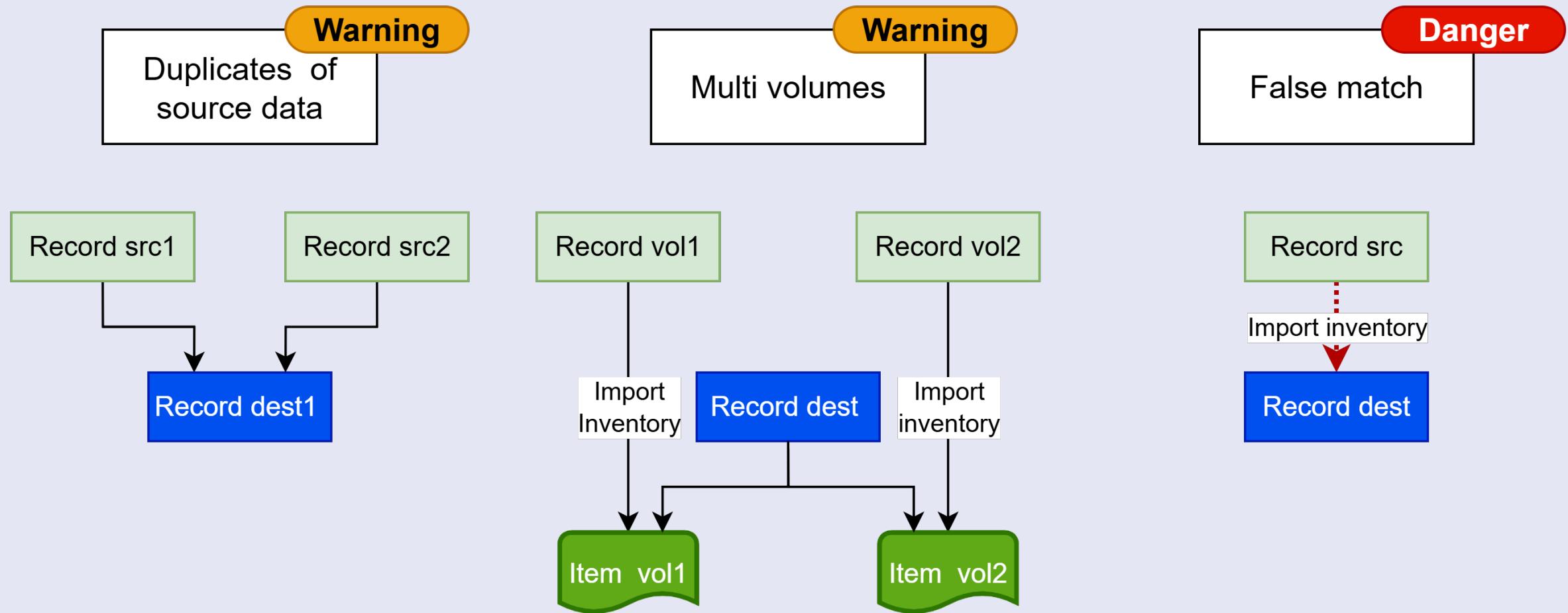
→ Rebuild structure of source data



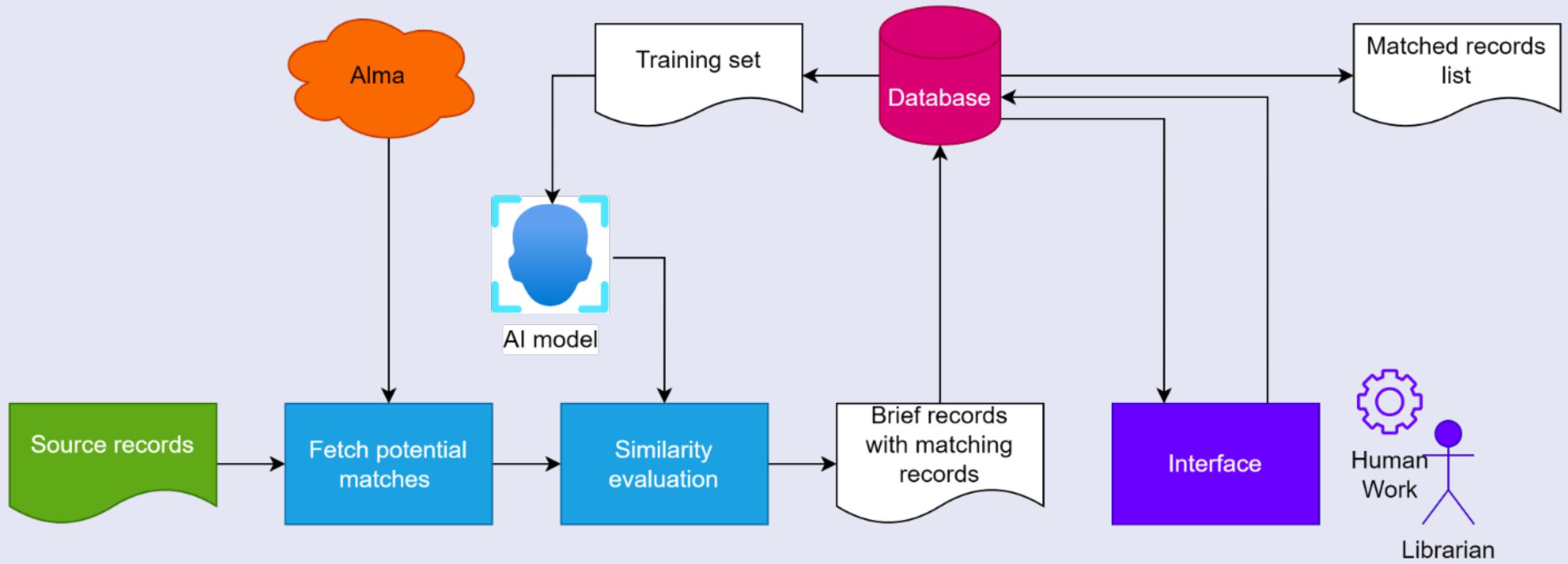
Deduplication: simple cases



Deduplication: common issues



Deduplication: workflow



SLSP dedup tool (POLAR_all_1)

Local IDs

Filter:

match

Record ID:



786 records

FM_25

FM_47

FM_51

✓ FM_65

FM_70

FM_73

FM_75

| | Local brief record | NZ / external brief record | Score |
|----------------------|--|--|-------|
| rec_id | FM_70 | 991171261779005501 | |
| format | Book / Physical / txt;n;nc | Book / Physical / txt;n;nc | 1 |
| titles | Fahrten und Forschungen der Holländer in den Polargebieten | Fahrten und Forschungen der Holländer in den Polargebieten: altholländische Berichte zur Geographie, Kultur- und Wirtschaftskunde der nördlichen Meere | 0.78 |
| short_titles | Fahrten und Forschungen der Holländer in den Polargebieten | Fahrten und Forschungen der Holländer in den Polargebieten | 1 |
| creators | Blink H. Dr. | Blink, H. / Cronheim, Paul | 0.87 |
| corp_creators | | | 0.00 |
| publishers | Otto Wigand | Wigand | 0.92 |
| years | 1913 | 1913 | 1 |
| editions | | | 0.00 |

[Select matching record](#)[Cancel matching record](#)

Add to training data

[Matching](#)[Not matching](#)**Record ID** **score**★ [991171261779005501](#) 0.88

Evaluation models

Current model:

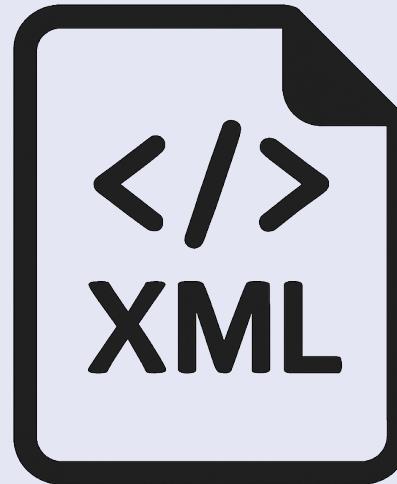
random_forest_general



Import profiles

Prepare XML data and import profile

- Use field to describe holdings
- Use field to describe items
- Configure import profile



Suitable for simple cases

- Works well with 1 item, 1 holding, 1 callnumber
- Very quick



Limitations and bugs

- Fails to import files due to network zone
- Few logs and rollback solutions



ALMA

APIs

Reproduce the entire process «manually»

- Create bib records
- Create holdings
- Create items
- Add local extensions

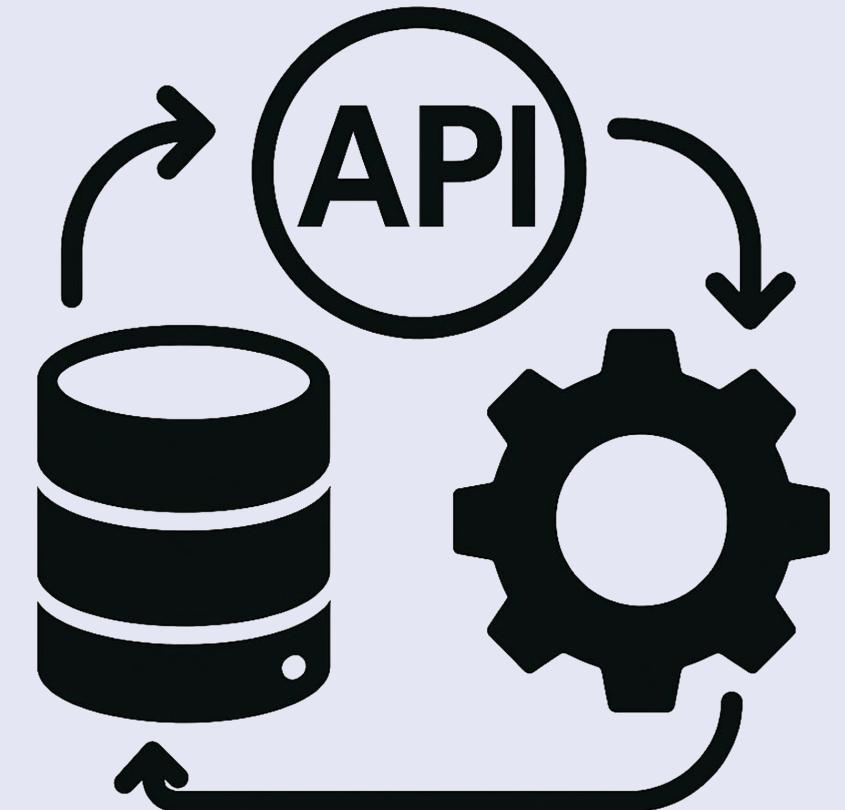
No item and holding number limitation



Be careful with API



- Logging
- Recover after failing records
- Rollback strategy available



APIs vs Import profiles

| Import profiles | APIs |
|--|---|
| Very quick | Slow |
| A lot of human operations | More flexibility |
| Configuration requires experience | Not easy to ensure adequate security |
| Risk of data chaos if error in configuration | Risk of data chaos if error in code or data |
| Good for homogenous data | Good for heterogeneous data |

Migration of non bibliographic data

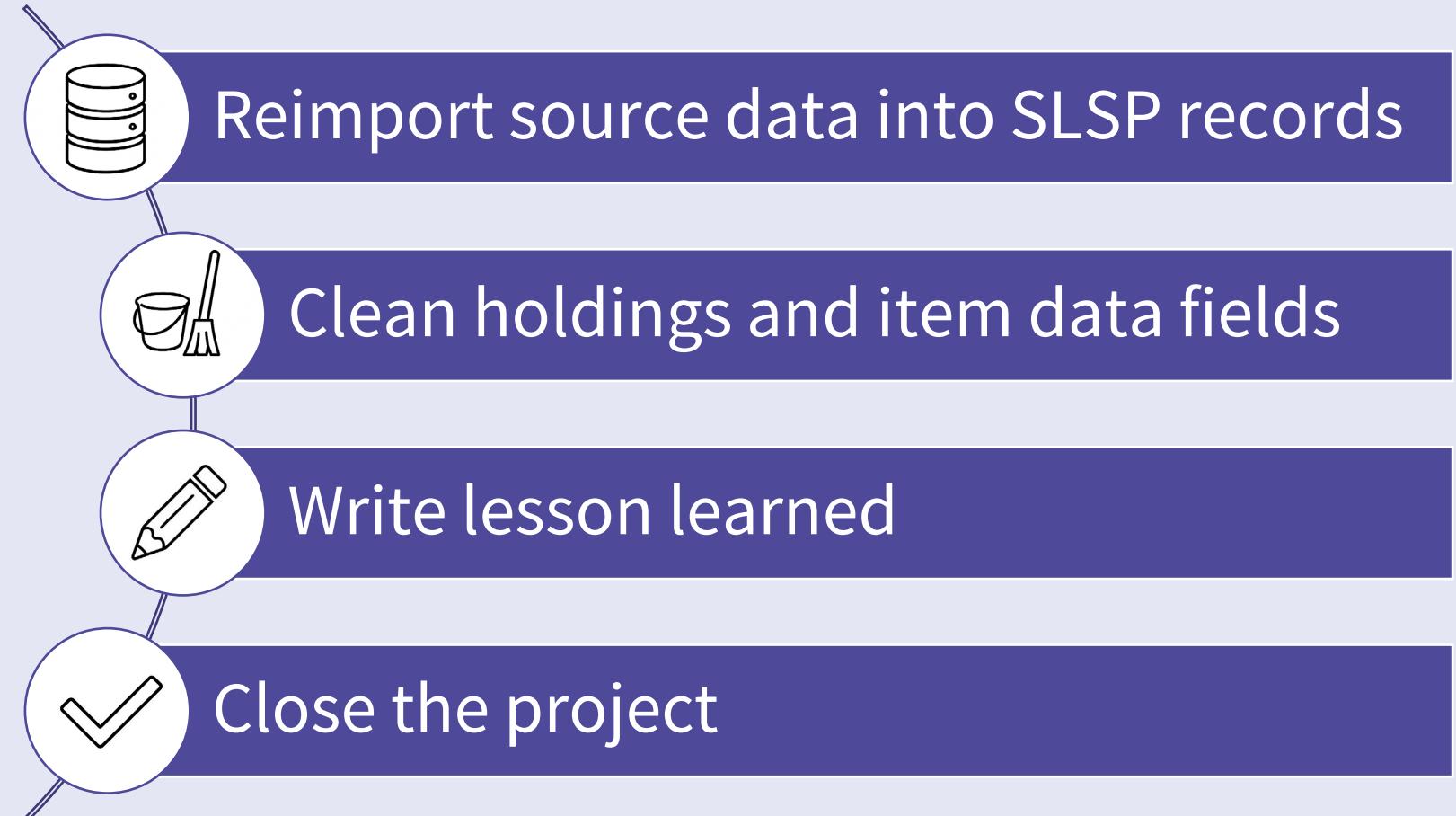
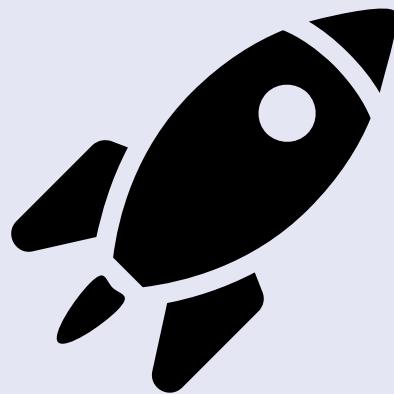


Not completely easy...

Workflows need often to be replayed using Alma jobs or APIs



(After) Go Live



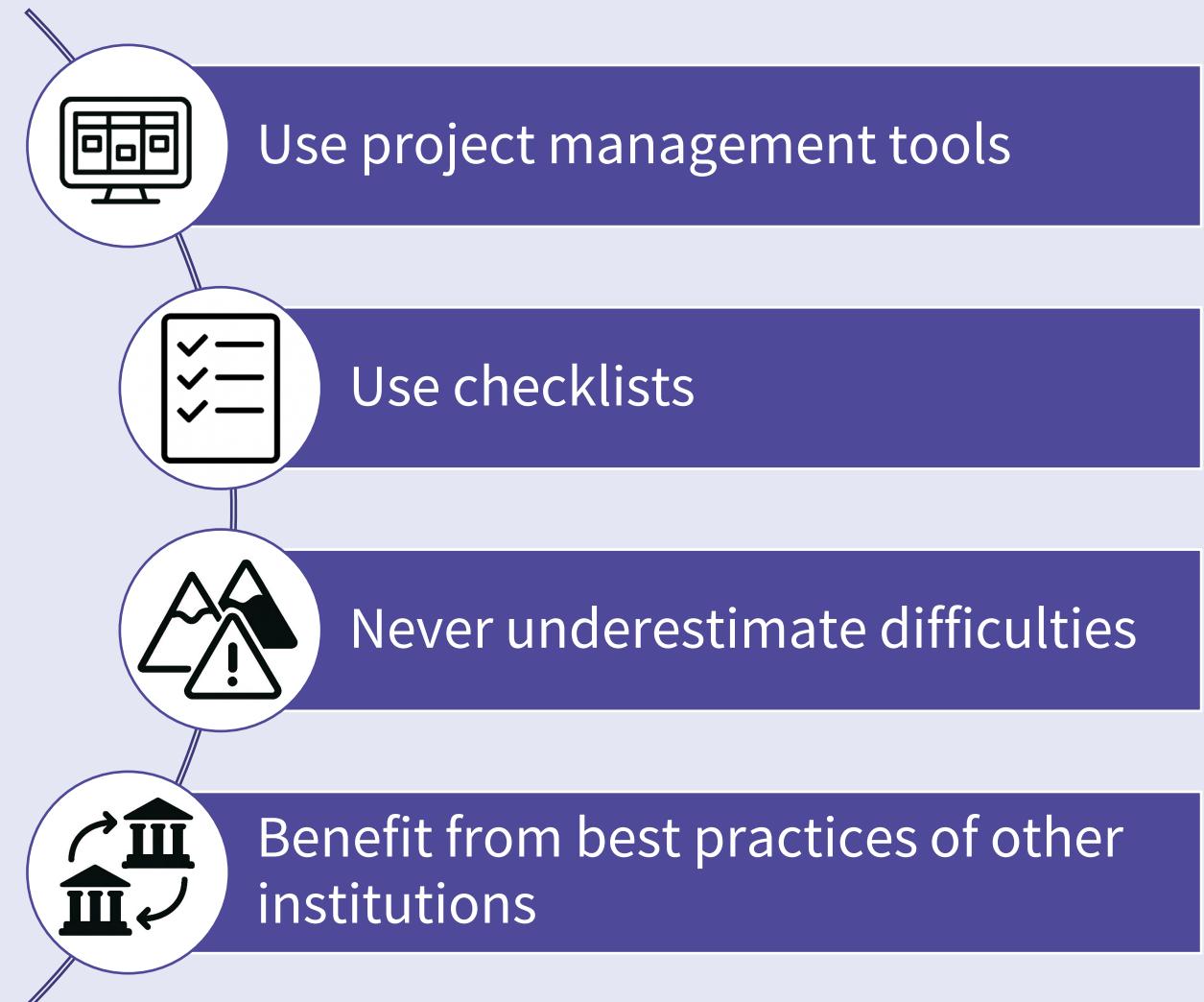
4) Involving Clarivate

Involving Clarivate

| | With Clarivate | On your own |
|-------------------------------|---|---|
| Project Management | Provided by Clarivate | Handled internally |
| Migration Completeness | Includes acquisition data, loans, requests | May exclude complex data (e.g. acquisitions) |
| Required Skills | Less internal expertise required | Requires in-house data expertise |
| Cost | Expensive | Time intensive |
| Flexibility / Control | More standardized process, less flexibility | Higher control over timing, scope, and field mappings |

5) Conclusion

Conclusion



Questions?

raphael.rey@slsp.ch

rouven.schabinger@slsp.ch

*“La migrazione non è solo uno spostamento
nello spazio, ma un cambiamento nella
conoscenza.”*



Resources

API tools

- Alma API Wrapper: <https://almapi-wrapper.readthedocs.io/en/latest/>
- Alma SRU: <https://almasru.readthedocs.io/en/latest/index.html>

Deduplication

- Interface: <https://github.com/Swiss-Library-Service-Platform/slspdeduptool>
- Algorithms: <https://github.com/Swiss-Library-Service-Platform/dedupmarcxml>

Transfer IZ to IZ

- https://github.com/Swiss-Library-Service-Platform/iz_to_iz_transfer