

Resolving problem Host Bibliographic migration data using a batch process

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Outline

- Background
- What are host bibliographic records?
- Why are they a problem?
- How did we fix them?
- Benefits and Impact
- Questions



University of Leeds Libraries

Background and Development

- **2019** - The University of Leeds Libraries migrated to Alma creating over 10,500 host bibliographic records.
- Since 2019 we have been manually tidying the metadata for each of these host bibliographic records individually; a time-consuming process.
- Over 6,200 host bibliographic records remained in our system before this project began.

- **2025** – I developed a quicker process to add the correct 773 Marc field to the Individual Title Bibs in batch and relink the physical item(s) to the correct Main Title Bib using several tools including:

 Alma Analytics

 MarcEdit

 Alma Merge Rule

 Alma Sets

 Microsoft Excel

 Premium Sandbox

 Alma Import Profile

 Generative AI help

Key Terms

1. Host Bibliographic Record (Host Bib Record):

A bibliographic record created during migration that acts as a host (container) for multiple related titles. The Host Bib Record links to the Main Title and Individual Title Bib(s) using multiple 774 MARC21 fields. The shared physical items also linked to this Host Bib Record.

2. Main Title Bibliographic Record (Main Title Bib):

The main bibliographic record representing the overarching title (e.g. a main journal title).

3. Individual Title Bibliographic Record (Individual Title Bib):

A bibliographic record representing a specific title within a larger collection or series (e.g. an individual volume or individual article bound within the Main Title).

Post-Migration Host Bib Data Issue (Before Fix)

Migrated Situation (Problematic State)

Host Bib Record

- 774 Marc field → Main Title Bib
- 774 Marc field(s) → Individual Title Bib(s)



Host Holdings Record



Item(s)

Main Title Bib

(No link to Individual Title Bib or item)

Individual Title Bib

(No link to Main Title Bib or item)

Problems:

- ✗ Items are not clearly linked to the correct Main Title Bib and Individual Title Bib
- ✗ Relationships between bibs are unclear
- ✗ Host Bib Record discovery display for users in Primo VE is confusing and hard to read
- ✗ Item call numbers are hidden
- ✗ Cataloguing and fulfilment workflows disrupted
- ✗ Queries from library users and library teams

Primo VE - Library User View (Before Fix)



Host Bib Record
appearance in
Primo VE to our
library users
(before fix)

BOOK
Host bibliographic record for boundwith item barcode 30106017571372
Available at Offsite Store Hillary Place Store >

Location

Request Other Issue

BACK TO LOCATIONS AND CLASSMARKS

LOCATION ITEMS

Offsite Store
Available Hillary Place Store

Item in place (0 requests) v.25, 2004
7 Days Loan
Material Type: Book
Location: Offsite Store Hillary Place Store
Barcode: 30106017571372

Request

Details

Title: Host bibliographic record for boundwith item barcode 30106017571372
Related titles: British journal of sociology of education. >
Source: Library Catalogue

Send to

READING LIST EMAIL CITATION EXPORT BIBTEX REFWORKS EN ENDNOTE ONLINE EXPORT RIS (ENDNOTE) PRINT PERMALINK

QR

Primo VE View (Before Fix)

JOURNAL
British journal of sociology of education.
Host bibliographic record for boundwith item barcode 30106015173015; Host bibliographic record for boundwith item barcode 30106017571372

[Available at Offsite Store Hillary Place Store \(Store JB08 Education 0 BRI\) and other locations >](#)
[View Journal Contents >](#)

Search inside
Search for articles within this journal

Article title or keyword 

Location
[Request Other Issue](#)
[◀ BACK TO LOCATIONS AND CLASSMARKS](#)

LOCATION ITEMS
Offsite Store
→ RELATED TITLE: [Host bibliographic record for boundwith item barcode 30106017571372](#)
Available , Hillary Place Store
 
Item in place (0 requests) v.25, 2004
7 Days Loan Material Type: Book
Location: Offsite Store Hillary Place Store
Barcode: 30106017571372
[Request](#) 

Details
Title British journal of sociology of education.
Is Part Of [Host bibliographic record for boundwith item barcode 30106015173015 >](#)
[Host bibliographic record for boundwith item barcode 30106017571372 >](#)
Publisher Oxford : Carfax.
Related titles Available in other form: [British journal of sociology of education \(Online\) >](#)
Format v.
Source Library Catalogue
Local subjects Social Sciences - Periodicals
Identifier Education - Periodicals
ISSN : 0142-5692



**Main Title Bib appearance in
Primo VE (before fix)**

BOOK
Pierre Bourdieu's sociology of education : the theory of practice and the practice of theory.
2004
Host bibliographic record for boundwith item barcode 30106017571372

[Available at Offsite Store Hillary Place Store >](#)

Location
[Request Other Issue](#)
[◀ BACK TO LOCATIONS AND CLASSMARKS](#)

LOCATION ITEMS
Offsite Store
→ RELATED TITLE: [Host bibliographic record for boundwith item barcode 30106017571372](#)
Available , Hillary Place Store
 
Item in place (0 requests) v.25, 2004
7 Days Loan Material Type: Book
Location: Offsite Store Hillary Place Store
Barcode: 30106017571372
[Request](#) 

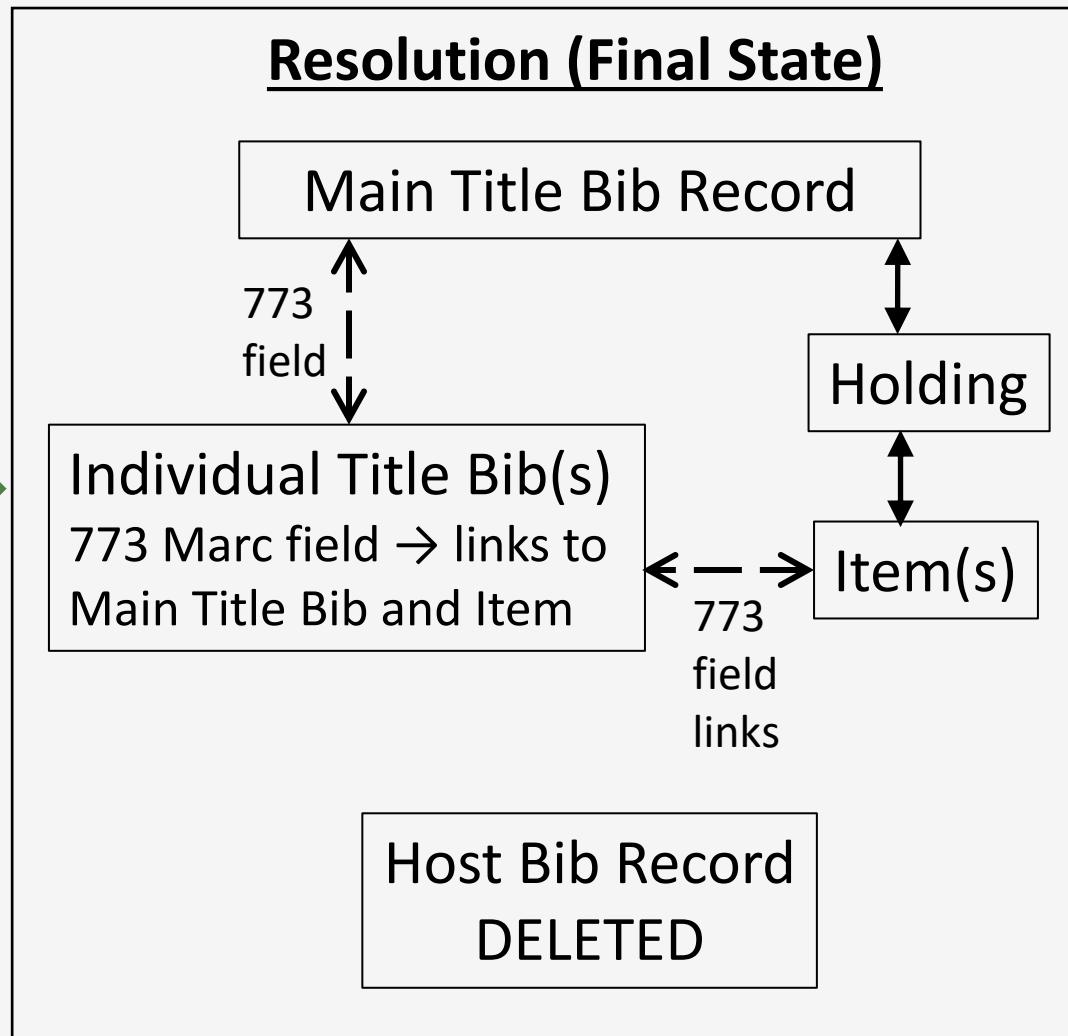
Details
Title Pierre Bourdieu's sociology of education : the theory of practice and the practice of theory.
Is Part Of [Host bibliographic record for boundwith item barcode 30106017571372](#)
Publisher Basingstoke : Carfax
Creation Date 2004
Subject [Bourdieu, Pierre, 1930-2002 >](#)
Series [British journal of sociology of education ; v.25, no.4, Sept. 2004 >](#)
Format p.412-544 ; 25 cm.
Source Library Catalogue
General Note Special issue of: British journal of sociology of education v.25, no.4, Sept. 2004.

Send to
       
 



**Individual Title Bib appearance in
Primo VE (before fix)**

Fixed Host Bibliographic Records



- ✓ Individual Title Bibs now contain 773 field that links back to the correct Main Title Bib and physical item
- ✓ Item(s) are now relinked to Main Title Bib (and correct holdings record)
- ✓ Host Bib Record is deleted
- ✓ Bibliographic structure is now clear and accurate
- ✓ Call numbers are visible and correctly displayed
- ✓ Improved resource discoverability in Primo VE and workflow integrity in Alma

Example of Resolution in Primo VE (Main Title Bib)

JOURNAL
British journal of sociology of education.
Available at Offsite Store Hillary Place Store [Store JB08 Education 0 BRI] >

Search inside

Search for articles within this journal

Article title or keyword 

Location

[Request Other Issue](#)

[BACK TO LOCATIONS AND CLASSMARKS](#)

LOCATION ITEMS

Offsite Store
Available , Hillary Place Store Store JB08 Education 0 BRI
Summary holdings: v.18 (1997)-v.25 (2004)
Notes: NOTES: Print

Item in place (0 requests)	v.18, 1997	Request
7 Days Loan	Material Type: Issue	
Location: Offsite Store Hillary Place Store Store	JB08 Education 0 BRI	
Barcode: 30106011514295		
Item in place (0 requests)	v.19, 1998	
7 Days Loan		
Item in place (0 requests)	v.20, 1999	
7 Days Loan		
Item in place (0 requests)	v.21, 2000	
7 Days Loan		
Item in place (0 requests)	v.22, 2001	
7 Days Loan		
Item in place (0 requests)	v.23, 2002	
7 Days Loan		

[SHOW MORE ITEMS](#)

Details

Title: British journal of sociology of education.
Publisher: Oxford : Carfax.
Related titles: Units : [Pierre Bourdieu's sociology of education : the theory of practice and the practice of theory.](#) >
[Units : The sociology of the curriculum.](#) >

Available in other form: [British journal of sociology of education \(Online\)](#) >



Main Title Bib appearance in
Primo VE (after fix)

Example of Resolution in Primo VE (Individual Title)

BOOK
Pierre Bourdieu's sociology of education : the theory of practice and the practice of theory.
2004
British journal of sociology of education; no:30106017571372

Available at Offsite Store Hillary Place Store Store JB08 Education 0 BRI

Location
Request Other Issue

◀ BACK TO LOCATIONS AND CLASSMARKS

LOCATION ITEMS

Offsite Store
↳ RELATED TITLE: *British journal of sociology of education.*
Available, Hillary Place Store Store JB08 Education 0 BRI
Summary holdings: v.18 (1997)-v.25 (2004)
Notes: NOTES: Print

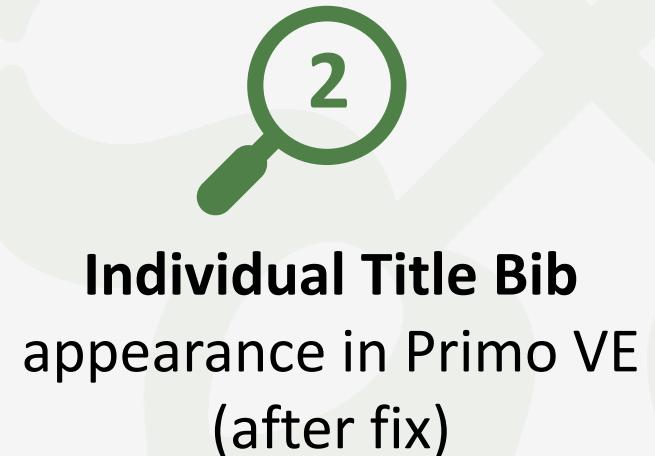
Item in place (0 requests) v.25, 2004
7 Days Loan
Material Type: Issue
Location: Offsite Store Hillary Place Store Store JB08 Education 0 BRI
Barcode: 30106017571372

Request

Details

Title: Pierre Bourdieu's sociology of education : the theory of practice and the practice of theory.
Is Part Of: British journal of sociology of education; no:30106017571372

Publisher: Basingstoke : Carfax
Creation Date: 2004
Subject: Bourdieu, Pierre, 1930-2002 >
Series: British journal of sociology of education ; v.25, no.4, Sept. 2004 >
Format: p.412-544 ; 25 cm.
Source: Library Catalogue
General Note: Special issue of British journal of sociology of education v.25, no.4, Sept. 2004.
Language: English



How did we fix this?

STAGE 1 Add 773 Marc Fields in batch using Alma Analytics, Excel, MarcEdit, Alma Sandbox, Merge Rule and Import Profile

Example 773 field structure in the Individual Title Bib:

773 0 # \$t [MAIN TITLE NAME].; \$w [MAIN TITLE MMS ID] \$g no:[ITEM BARCODE NUMBER]

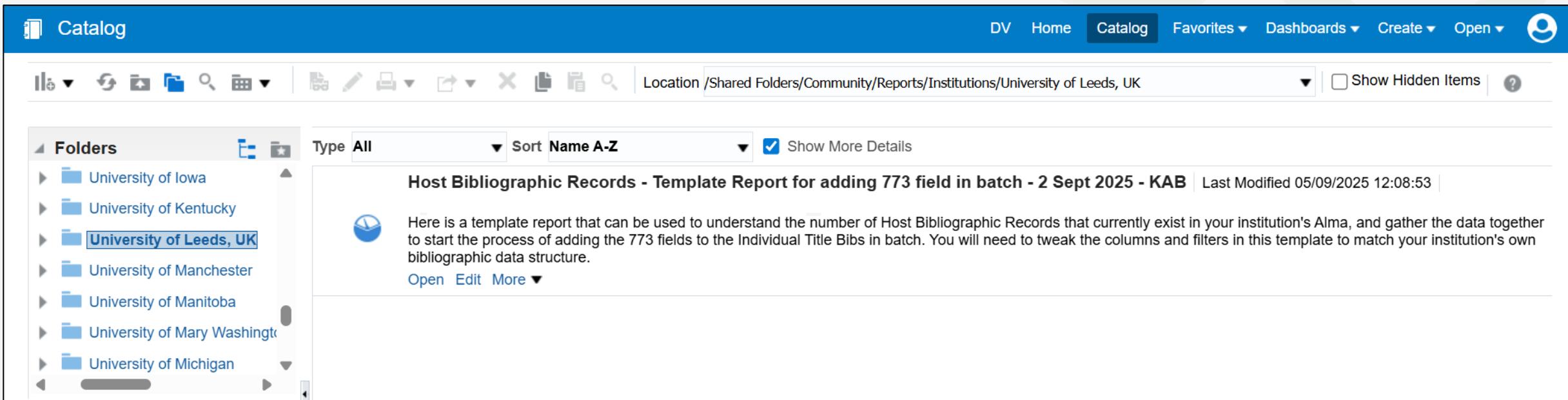
773 0 # \$t British journal of sociology of education.; \$w 991014466129705181 \$g no:30106017571372

Reminder: The 773 field creates the link between the Individual Title Bib, and both the Main Title Bib (using the main title and MMS ID) and the physical item (using the barcode number)

STAGE 2 Relink physical item(s) to correct Main Title Bib and delete Host Bib Record using Sets within Alma

Adding 773 Marc fields in batch (Alma Analytics)

- Find the shared template report in Analytics using the following folder path:
Shared Folders/Community/Reports/Institutions/University of Leeds, UK
- Host Bibliographic Records – Template Report for adding 773 field in batch:**



The screenshot shows the Alma Analytics interface with a blue header bar. The header includes the Catalog tab, DV, Home, Catalog, Favorites, Dashboards, Create, and Open buttons, along with a user icon. Below the header is a toolbar with various icons for file operations. The main content area has a search bar with the location set to /Shared Folders/Community/Reports/Institutions/University of Leeds, UK. On the left, there is a sidebar titled 'Folders' with a list of institutions: University of Iowa, University of Kentucky, University of Leeds, UK (which is selected and highlighted in blue), University of Manchester, University of Manitoba, University of Mary Washington, and University of Michigan. The main content area displays a template report titled 'Host Bibliographic Records - Template Report for adding 773 field in batch - 2 Sept 2025 - KAB'. The report was last modified on 05/09/2025 at 12:08:53. It contains a brief description: 'Here is a template report that can be used to understand the number of Host Bibliographic Records that currently exist in your institution's Alma, and gather the data together to start the process of adding the 773 fields to the Individual Title Bibs in batch. You will need to tweak the columns and filters in this template to match your institution's own bibliographic data structure.' Below the description are 'Open', 'Edit', and 'More' buttons.

- This template report can be used to see how many Host Bib Records exist in your Alma.
- NOTE: The columns and filters will need to be tweaked to match your institution's own bibliographic data structure.

1

Adding 773 Marc fields in batch (Analytics Filters)

Host Bibliographic Records - Template Report for add...

Criteria Results Prompts Advanced

Selected Columns

Physical Item Details	Bibliographic Details	Physical Item Details	Holdings Details	Physical Item Details	Location	Bibliographic Details	Physical Item Details	Bibliographic Details						
Row Count	Suppressed From Discovery	Bibliographic Lifecycle	Material Type	Permanent Call Number	Public Note	Library Name	MMS Id	Title	Barcode	1st 774	2nd 774	3rd 774	4th 774	5th 7

Filters

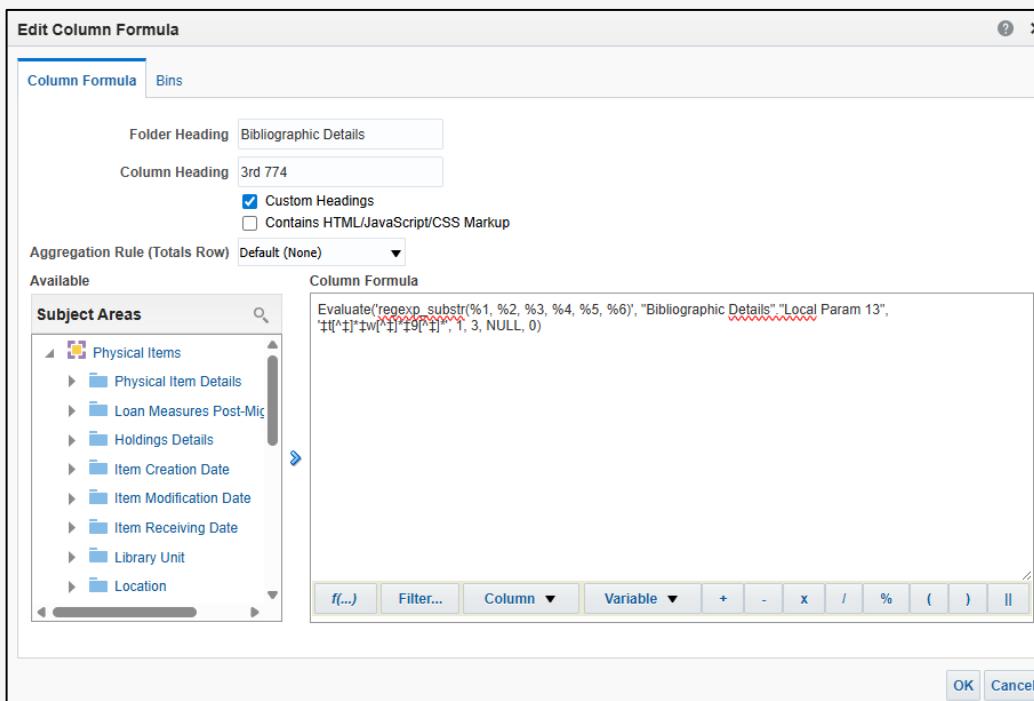
- Title begins with Host bibliographic record
- AND Bibliographic Lifecycle is equal to 0 is in In Repository
- AND Library Name is not equal to / is not in Special Collections; Special Collections Store
- AND Public Note is null
- AND Suppressed From Discovery is equal to / is in No
- AND Permanent Call Number does not contain BL Micro
- AND Permanent Call Number does not contain Enquiry Desk
- AND Title does not contain and others
- AND Barcode does not contain NULL
- AND EVALUATE-regexp_substr(%1, %2,... is null
- AND Permanent Call Number does not contain Case AC
- AND Material Type does not contain DVD

Excluded from Phase 1 of the project:	Corresponding Analytics Filter:
Host Bib Records with more than one physical item	Title does not contain and others
Special Collection Host Bib Records	Library Name is not equal to Special Collection; Special Collections Store
DVDs/Microfilm/Enquiry Desk/Case AC etc.	Material Type does not contain DVD; Permanent Call Number does not contain BL Micro, Enquiry Desk, or Case AC

Adding 773 Marc fields in batch (Analytics Formula)

Excluded from Phase 1 of the project:	Corresponding Analytics Filter:
Host Bib Records with more than two 774 fields (i.e. where multiple Individual Title Bibs are linked to one Main Title Bib)	💡 EVALUATE('regexp_substr(%1, %2,... is null

- Here, in the 'Edit Formula' tab of every 774 field column (1st, 2nd, 3rd etc.) Oracle SQL and Regular Expression have been used to put the 774 fields into separate columns, rather than one long data string in one single 774 field column.



- The '...is null' filter has then been applied to the 3rd 774 column to exclude any Host Bib Records that have more than two 774 fields, to keep the data simple for Phase 1.
- NOTE: The 774 field was created as a 'Local Param' in our Analytics environment by asking Alma Support before this process.
- TIP: SQL/RegEx formula was created with help from Generative AI (Microsoft Copilot) – test and adjust it!

1

Adding 773 Marc fields in batch (Export to Excel)

- Next step is to click on Results, and export the Analytics Report to Excel:

Row Count	Bibliographic Lifecycle	Suppressed From Discovery	Permanent Call Number	Material Type	Public Note	Library Name	MMS Id	Title	Barcode	1st 774	2nd 774	3rd 774	4th 774	5th 774	6th 774	7th 774	8th 774	9th 774	10th 774	11th 774	12th 774	13th 774	14th 774	15th 774	16th 774	17th 774	18th 774	
153	In Repository	No	Economics D-82 ZYS	Book		Edward Boyle Library	991018727729705181	Host bibliographic record for boundwith item barcode 30106013655278	30106013655278	‡t Enlarging Europe : the industrial foundations of a new political reality / John Zysman and Andrew Schwartz, editors. †w 991004382259705181 ‡9 ExL;	‡t The external sector, the state, and development in Eastern Europe / Barry Eichengreen and Richard Kohl. †w 991004382299705181 ‡9 ExL																	
153			French L-13 DAU	Book		Brotherton Library	991018757989705181	Host bibliographic record for boundwith item barcode 30106010721768	30106010721768	‡t Le petit chose : Part I / Edited with notes and vocabulary by Wm. Robertson. †w 991014967019705181 ‡9 ExL;	‡t Word- and phrasebook for Le petit chose : Part I-En province / by the general editors of the series. †w 991014752049705181 ‡9 ExL																	
153			Greek G-0.03 ORP/D	Book		Brotherton Library	991018812029705181	Host bibliographic record for	30106000550649	‡t De hymnis Orphicis capitula quinque / scriptis Albrechtus	‡t Abraxas Studien zur Religionsgeschichte																	

Time Estimate: Approx. 1 hour

Adding 773 Marc fields in batch (Excel)

Next, tidy the Excel data:

1. Freeze top row
2. 1st 774 column - Sort A-Z (Expand the selection option)

IMPORTANT: we need the Main Title Bib in the 1st 774 column, and the Individual Title Bib in the 2nd 774 column. They will not automatically be in the correct order!

3. Manually check this:
 - For some records it will be obvious as there will be more than one of the same Main Title Bib and MMS ID in the 1st 774 column
 - For others it may be less obvious, and you will need to check in Alma to confirm
 - If there are any rows where you cannot work out which is the Main Title Bib and Individual Title Bib (hopefully will be rare) then delete that row so that the undetermined Host Bib Record is not included in the process
 - Swap the data in these cells if the data is the wrong way around (next slide explains how to do this in Excel)

Adding 773 Marc fields in batch (Excel - VBA Editor)

- ✓ **Main Title Bib MUST be in the 1st 774 column**
- ✓ **Individual Title Bib MUST be in 2nd 774 column**

1. If the data is the wrong way around, swap these cells by creating a Macro using the VBA Editor in Excel
2. To do this press Alt + F11.
3. Click Insert -> Module
4. Copy and paste the VBA code to swap cells (again a little help from Generative AI here)

VBA Code:

```
Sub SwapCells()  
    Dim cell1 As Range, cell2 As Range  
    Set cell1 = Application.InputBox("Select the first cell:", Type:=8)  
    Set cell2 = Application.InputBox("Select the second cell:", Type:=8)  
    Dim temp As Variant  
    temp = cell1.Value  
    cell1.Value = cell2.Value  
    cell2.Value = temp  
End Sub
```

5. Save as an Excel Macro-Enabled Workbook file type
6. To run the Macro, press Alt + F8, click Run
7. Follow the prompts to select the first and second cell to swap, press OK
8. The Macro will then swap the contents of the two selected cells with no need to copy and paste



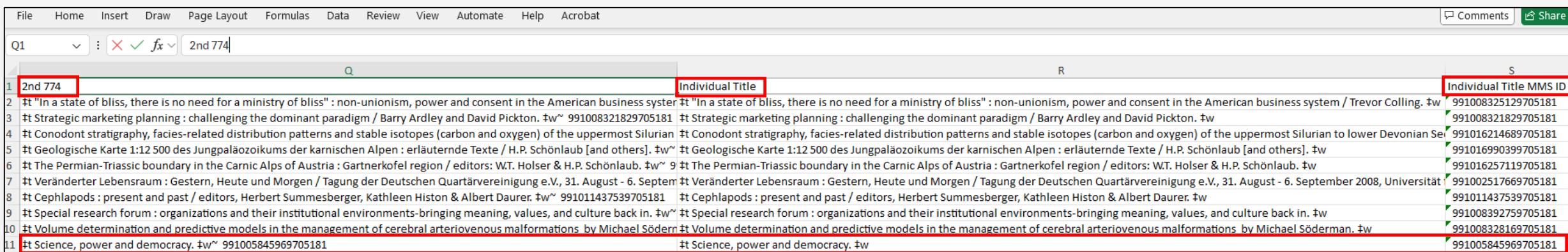
Time Estimate: Approx. 14 hours per 803 records



1 Adding 773 Marc fields in batch (Excel - Tidying)

Once 774 order is correct, we can now create new 773 fields in Excel to add to the Individual Title Bibs:

1. Copy the existing data into a new sheet
2. In 1st 774 column and in 2nd 774 column - FIND any **#9 ExL** and **#9 ExL;** and REPLACE with blank
3. In 1st 774 column - FIND **#w** and REPLACE with ; **#w**
4. Can use Conditional Formatting to check if any **#9** or **#w** were missed by accident
5. Insert two new empty columns after the 2nd 774 column
6. In 2nd 774 column – FIND **#w** and REPLACE with **#w~**
7. Click Data -> Text to Columns -> delimited by ~. Change column data format to ‘Text’ for all column headers.
8. Select destination as the next blank column. Finish.
9. **Name the two new columns created – 1. Individual Title and 2. Individual Title MMS ID**



File	Home	Insert	Draw	Page Layout	Formulas	Data	Review	View	Automate	Help	Acrobat	Comments	Share
Q1													
1	2nd 774					Individual Title						Individual Title MMS ID	
2	#t "In a state of bliss, there is no need for a ministry of bliss" : non-unionism, power and consent in the American business system #t "In a state of bliss, there is no need for a ministry of bliss" : non-unionism, power and consent in the American business system / Trevor Colling. #w 991008325129705181												
3	#t Strategic marketing planning : challenging the dominant paradigm / Barry Ardley and David Pickton. #w~ 991008321829705181					#t Strategic marketing planning : challenging the dominant paradigm / Barry Ardley and David Pickton. #w							
4	#t Conodont stratigraphy, facies-related distribution patterns and stable isotopes (carbon and oxygen) of the uppermost Silurian. #t Conodont stratigraphy, facies-related distribution patterns and stable isotopes (carbon and oxygen) of the uppermost Silurian to lower Devonian Se												
5	#t Geologische Karte 1:12 500 des Jungpaläozoikums der karnischen Alpen : erläuternde Texte / H.P. Schönlaub [and others]. #w~					#t Geologische Karte 1:12 500 des Jungpaläozoikums der karnischen Alpen : erläuternde Texte / H.P. Schönlaub [and others]. #w							
6	#t The Permian-Triassic boundary in the Carnic Alps of Austria : Gartnerkofel region / editors: W.T. Holser & H.P. Schönlaub. #w~ 9 #t The Permian-Triassic boundary in the Carnic Alps of Austria : Gartnerkofel region / editors: W.T. Holser & H.P. Schönlaub. #w												
7	#t Veränderter Lebensraum : Gestern, Heute und Morgen / Tagung der Deutschen Quartärvereinigung e.V., 31. August - 6. Septem					#t Veränderter Lebensraum : Gestern, Heute und Morgen / Tagung der Deutschen Quartärvereinigung e.V., 31. August - 6. September 2008, Universität							
8	#t Cephalopods : present and past / editors, Herbert Summesberger, Kathleen Histon & Albert Daurer. #w~ 991011437539705181					#t Cephalopods : present and past / editors, Herbert Summesberger, Kathleen Histon & Albert Daurer. #w							
9	#t Special research forum : organizations and their institutional environments-bringing meaning, values, and culture back in. #w~					#t Special research forum : organizations and their institutional environments-bringing meaning, values, and culture back in. #w							
10	#t Volume determination and predictive models in the management of cerebral arteriovenous malformations. by Michael Söderman. #w~					#t Volume determination and predictive models in the management of cerebral arteriovenous malformations. by Michael Söderman. #w							
11	#t Science, power and democracy. #w~ 991005845969705181					#t Science, power and democracy. #w							

Adding 773 Marc fields in batch (Excel – Concatenate)

10. Insert a new column called Full Correct 773 0# field
11. In first cell under this header type formula: **=CONCATENATE(F2,"‡g no:",E2)**.
12. First target range F2 is the first cell from the 1st 774 column (Main Title), and second target E2 is the first cell in the Barcode column.
13. NOTE: concatenate formula will only work with 'General' data format, not 'Text'.
13. On the left bottom corner of the cell, find the + symbol and drag it down to create the rest of the 773 fields.
14. Copy and paste (values) this column into a new column called Full Correct 773 0# (No Formula) - I do this step because it is easier to work with data that has no formula.

Individual Title MMS ID		
S	T	U
1 Individual Title MMS ID	Full Correct 773 0# field	Full Correct 773 0# field (No Formula)
2 991008325129705181	‡t [Leicester Business School occasional papers].; ‡w 991008324899705181 ‡g no:30106014749864	‡t [Leicester Business School occasional papers].; ‡w 991008324899705181 ‡g no:30106014749864
3 991008321829705181	‡t [Leicester Business School occasional papers].; ‡w 991008324899705181 ‡g no:30106014749906	‡t [Leicester Business School occasional papers].; ‡w 991008324899705181 ‡g no:30106014749906
4 991016214689705181	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106019730794	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106019730794
5 991016990399705181	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106020292834	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106020292834
6 991016257119705181	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106006037542	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106006037542
7 991002517669705181	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106022413347	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106022413347
8 991011437539705181	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106015783821	‡t Abhandlungen der Geologischen Bundesanstalt.; ‡w 991001266799705181 ‡g no:30106015783821
9 991008392759705181	‡t Academy of Management journal.; ‡w 991014447889705181 ‡g no:30106022719735	‡t Academy of Management journal.; ‡w 991014447889705181 ‡g no:30106022719735



Time Estimate: Approx. 1 hr 30 mins

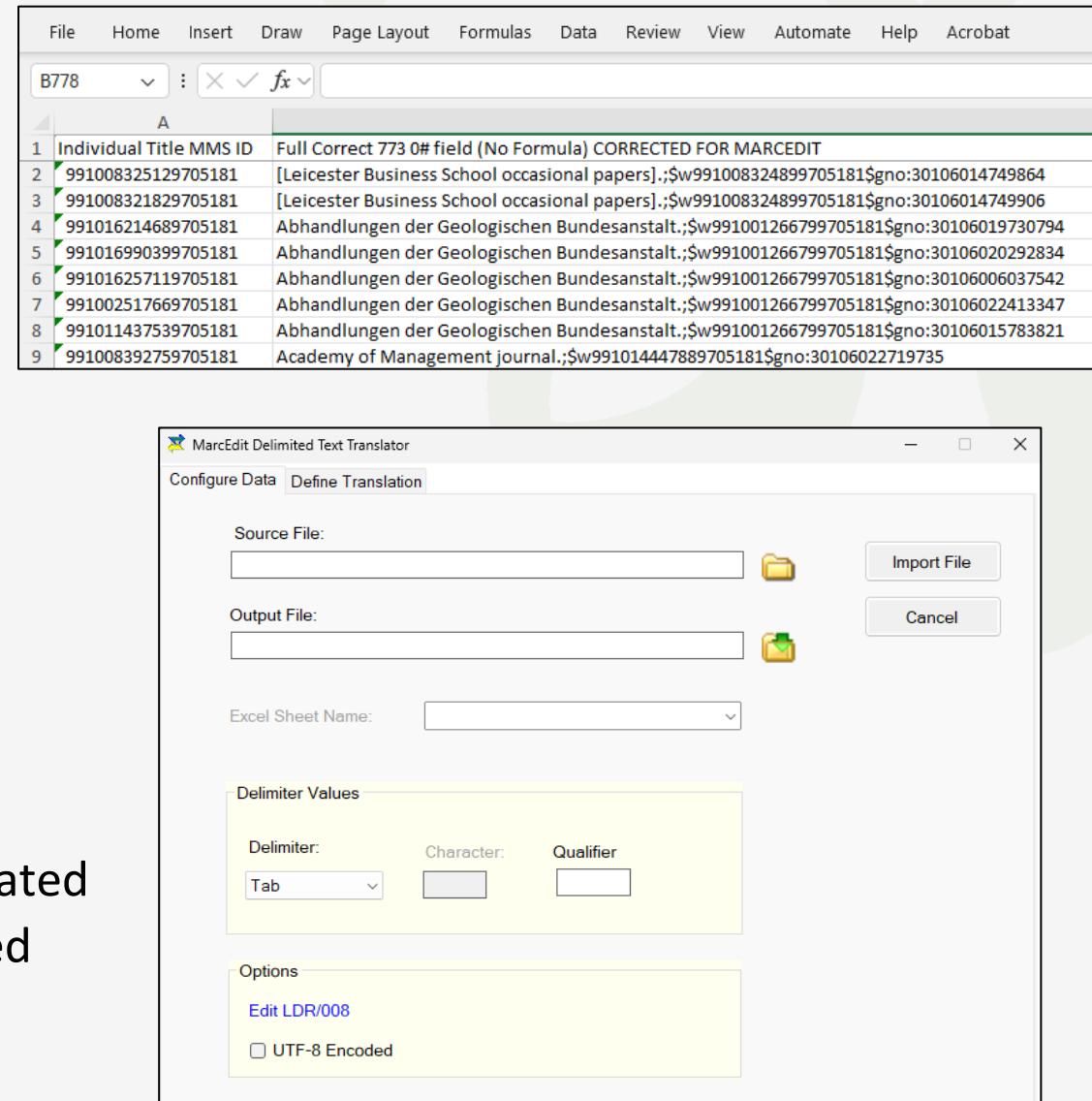


1 Adding 773 Marc fields in batch (MarcEdit)

15. Create a new column that has data corrected for use in MarcEdit (i.e. correct \$ delimiter and no spacing between subfields)
16. Create new Excel sheet that contains the Individual Title MMS ID Column and the Full Correct 773 0# field (No Formula) CORRECTED FOR MARCEDIT column next to each other

Download MarcEdit <https://marcedit.reeiset.net>

1. Open MarcEdit
2. Tools → Delimited Text Translator
3. Source file = Excel spreadsheet
4. Output file = [Pick name and location in your files]
5. Excel Sheet Name = Pick the sheet you have just created
6. Delimiter = Tab; don't edit LDR; select UTF-8 Encoded
7. Click Import File



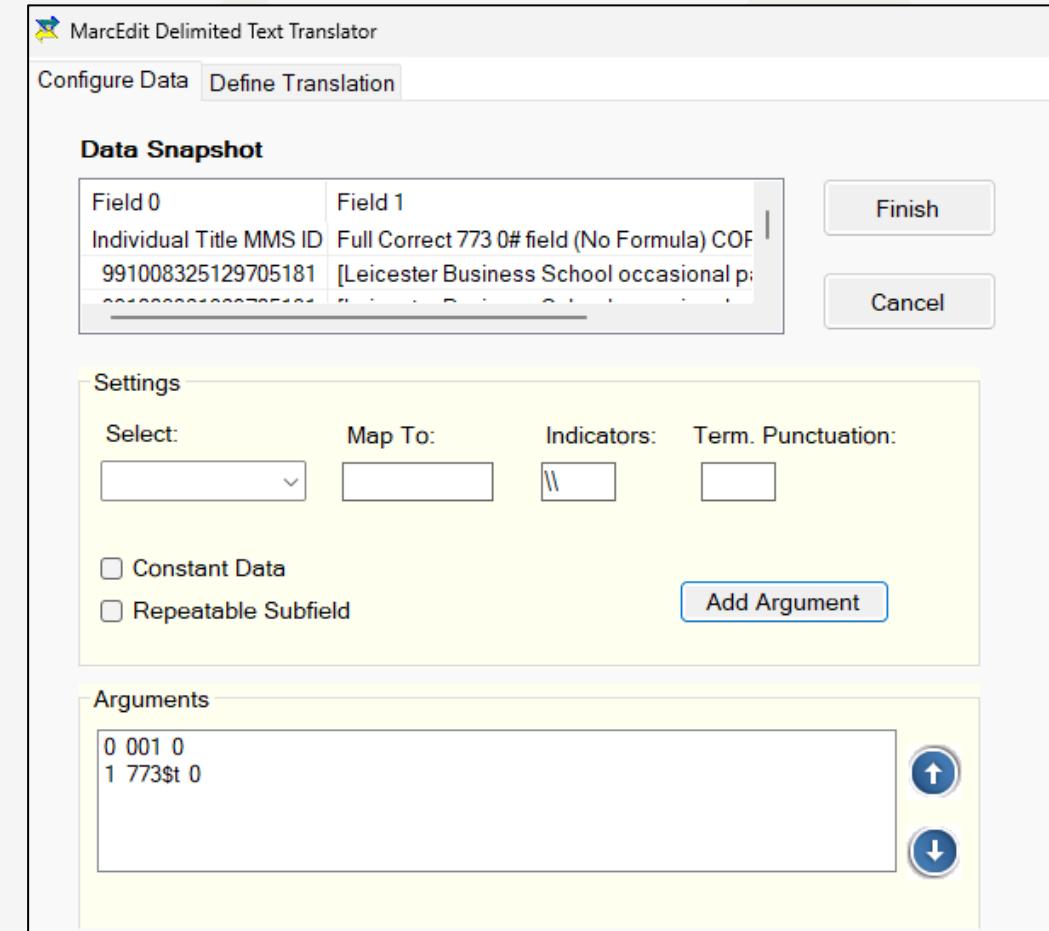
Adding 773 Marc fields in batch (MarcEdit Mapping)

Map Fields:

8. Field 0 – Map To: 001 – Indicators: \\ - Add Argument
9. Field 1 – Map To: 773\$t – Indicators: 0\\ - Add Argument
10. Tick Sort Fields
11. Untick Calculate common nonfiling data
12. Tick Ignore Header Row. Click Finish

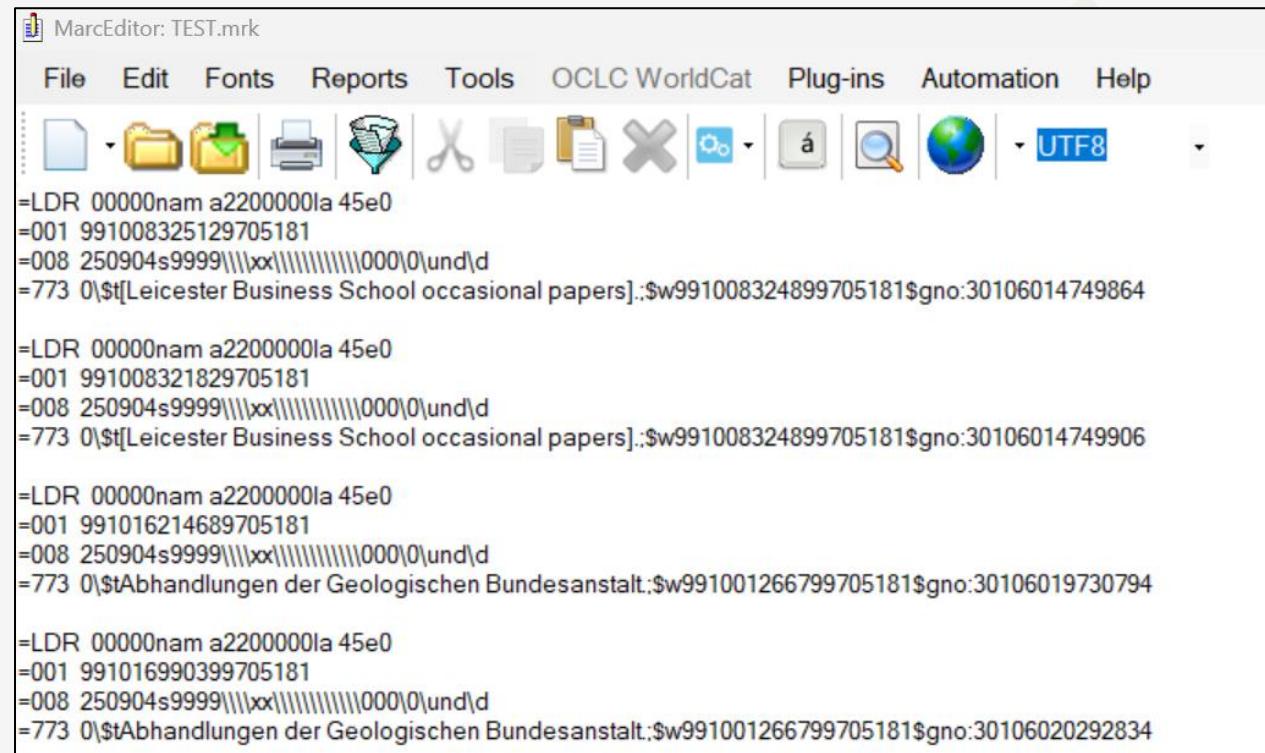
Open MarcEditor:

13. File -> Open MARC Mnemonic .mrk file just created
14. Check that all formatting now looks correct in MarcEditor (e.g. correct spacing, delimiters etc.)
15. Correct formatting if needed using Find and Replace e.g. I have 2 extra spaces before MMS ID in 001 field



1 Adding 773 Marc fields in batch (MarcEdit continued)

16. Correct formatting in MarcEditor should now look like this:



```
MarcEditor: TEST.mrk
File Edit Fonts Reports Tools OCLC WorldCat Plug-ins Automation Help
UTF8

=LDR 00000nam a2200000la 45e0
=001 991008325129705181
=008 250904s9999||||xx|||||||000\0\und\d
=773 0\$t[Leicester Business School occasional papers].:w991008324899705181$gno:30106014749864

=LDR 00000nam a2200000la 45e0
=001 991008321829705181
=008 250904s9999||||xx|||||||000\0\und\d
=773 0\$t[Leicester Business School occasional papers].:w991008324899705181$gno:30106014749906

=LDR 00000nam a2200000la 45e0
=001 991016214689705181
=008 250904s9999||||xx|||||||000\0\und\d
=773 0\$tAbhandlungen der Geologischen Bundesanstalt.:w991001266799705181$gno:30106019730794

=LDR 00000nam a2200000la 45e0
=001 991016990399705181
=008 250904s9999||||xx|||||||000\0\und\d
=773 0\$tAbhandlungen der Geologischen Bundesanstalt.:w991001266799705181$gno:30106020292834
```

17. Check data is matching correctly with Excel data - Individual Title, Individual Title MMS ID, and Barcode
18. Create MARC Binary .mrc file type using funnel icon 

 Time Estimate: Approx. 30 minutes 

1 Adding 773 Marc fields (Merge Rule & Import Profile)

TOP TIP: Test in Sandbox before Production

Create Merge Rule in Alma Metadata Editor (MDE):

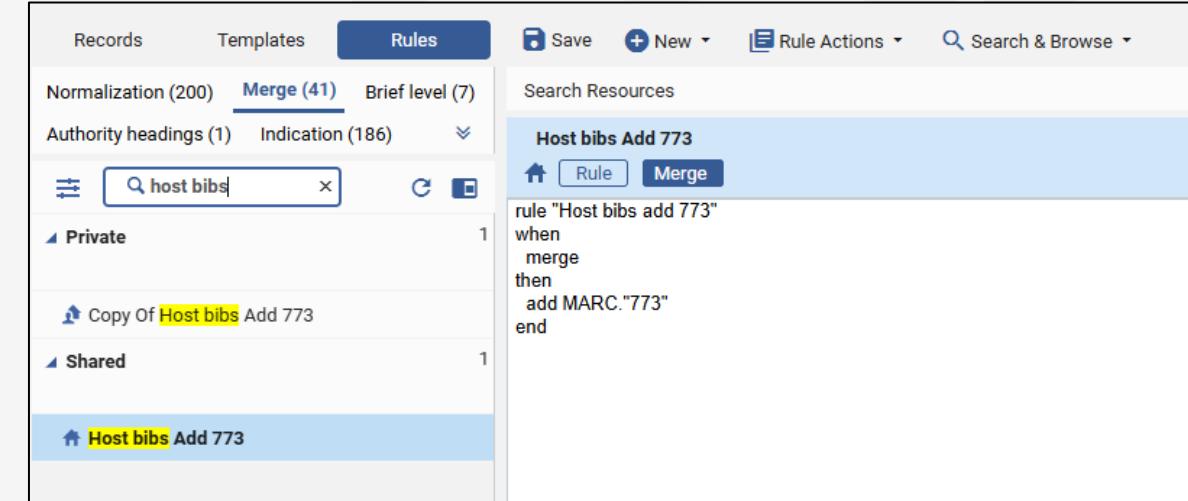
1. New -> Merge Rule. Enter name and description.
2. Merge Rule syntax:

```
rule "Host bibs add 773"
when
  merge
then
  add MARC."773"
end
```

3. Save - merge rule will be used in Import Profile to add 773 fields we created in MarcEdit.

Create Import Profile:

4. Resources → Manage Import Profiles
5. Add new Profile -> Repository
6. Fill out and select same details in screenshot
7. Next, leave as it is. Click Next again.



Records Templates Rules

Normalization (200) Merge (41) Brief level (7)

Authority headings (1) Indication (186)

host bibs

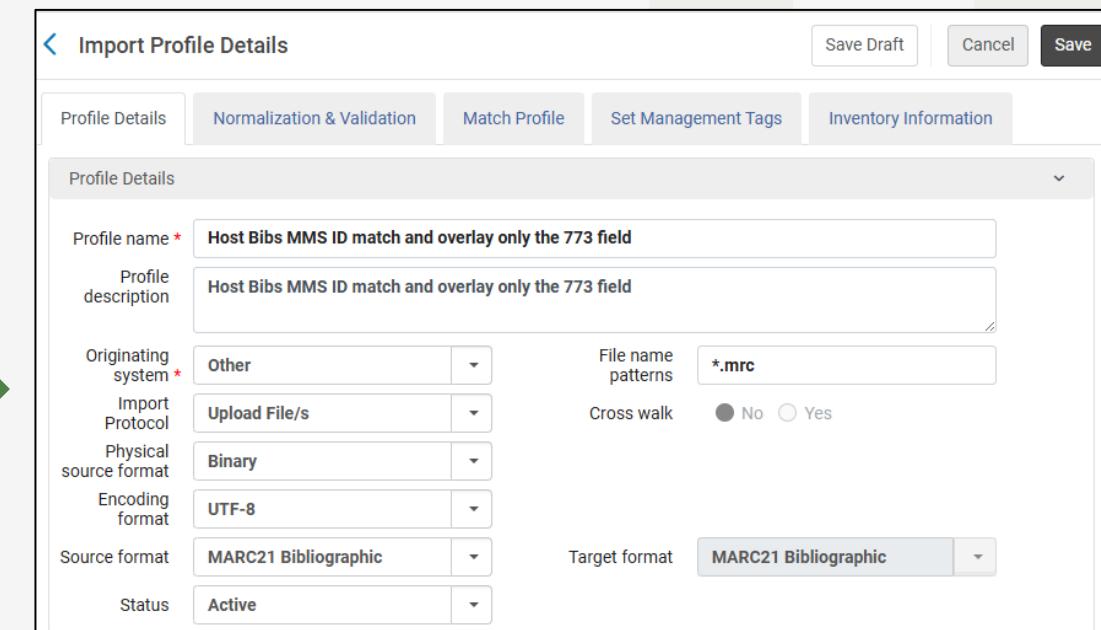
Private

Copy Of Host bibs Add 773

Shared

Host bibs Add 773

rule "Host bibs add 773"
when
merge
then
add MARC."773"
end



Import Profile Details

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information

Profile name * Host Bibs MMS ID match and overlay only the 773 field

Profile description Host Bibs MMS ID match and overlay only the 773 field

Originating system * Other

Import Protocol Upload File/s

Physical source format Binary

Encoding format UTF-8

Source format MARC21 Bibliographic

File name patterns *.mrc

Cross walk No Yes

Target format MARC21 Bibliographic

Status Active

1 Adding 773 Marc fields (Import Profile Continued...)

Match Profile Tab:

8. Fill out and select/tick same details in screenshot
9. Key points:
 - 001 to MMS_ID Match Method
 - Merge method – Host Bibs Add 773
10. Click Next, Click Next again, Save



Import Profile Details

Profile Details Normalization & Validation Match Profile Set Management Tags Inventory Information

Match Profile

Match by Serial / Non Serial Yes No

Serial match method 001 To MMS_ID Match Method

Non Serial match method 001 To MMS_ID Match Method

Select an Electronic Collection to match against

Match Actions

Handling method Automatic Manual

Upon match Merge Overlay Do Not Import Import New Record

Select Action Disregard matches for bibliographic CZ linked records
 Single match - match only record with the same inventory type (electronic/physical)
 Match on title type

MERGE/OVERLAY

Merge method Host bibs Add 773

Select Action Allow bibliographic record deletion
 Do not override/merge a record with lower brief version
 Do not override Originating System

Community Zone linked records handling Skip record

Do not override/merge record with an older version Disabled Consider Originating System Ignore Originating System

Automatic Multi-Match Handling

Select Action Disregard matches for bibliographic CZ linked records
 Disregard invalid/canceled system control number identifiers
 Prefer record with the same inventory type (electronic/physical)
 Match on title type
 Choose a conclusive action in case the above selected criteria result in multiple records:
 Skip and do not import unresolved records
 Use record with the latest created date

Handle Record Redirection

Canceled record field Canceled record subfield

Canceled record Delete Suppress Keep it

Merge method Overlay all fields but local

Update holdings call number

No Match

Upon no match Do Not Import Import

Save Draft Cancel Save



Time Estimate: Approx. 1 hour



2 Relink Items from Host Bib Record to Main Title Bib

Create Sets of items in Alma that need to be relinked :

1. In Alma, do an 'All titles': 'keywords' search for each Main Title MMS ID (use Excel data information)

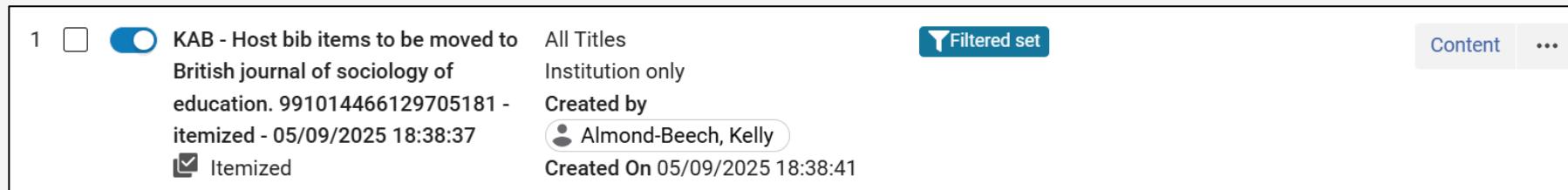


2. This will bring up a list of all the Host Bib Records, the Main Title Bib, and the Individual Title Bibs that have the new 773 field in.
3. Create a Set from this search using top right 'Create and Filter' button.

Example Set Name (tick Private):

KAB - Host bib items to be moved to British journal of sociology of education. 991014466129705181

- Itemize set (untick Private this time, so sets can be shared out):



1 KAB - Host bib items to be moved to British journal of sociology of education. 991014466129705181 - itemized - 05/09/2025 18:38:37 Itemized

All Titles
Institution only
Created by
Almond-Beech, Kelly
Created On 05/09/2025 18:38:41

Filtered set Content ...

5. Check this data matches your Excel data for these records (NOTE: some results may include Host Bib Records with more than two 774s – remove these from set as they are not part of Phase 1 of the project).



Time Estimate: Approx. 21 hours for 803 records



2 Relink Items to Main Bib Record (using Alma Sets)

Sets now created and can be shared with others to complete final stage:

1. Edit the Set name to take it as yours – so people don't work on the same ones accidentally
2. Copy Main Title Bib MMS ID from set name e.g. 991014466129705181
3. On each Host Bib Record, click on Items (1 of 1 available) -> Tick item -> Manage selected -> Relink to another bib
4. 'All titles': 'MMS ID' search (Paste in Main Title MMS ID you have just copied from the Set name). Select this Main Title Bib
5. Tick correct holdings location (usually matches up with original item location in Host Bib holdings). Click select
5. Select delete bibliographic record (unless other holdings are present) when last item is moved.



Host Bib Record is now deleted!



The screenshots illustrate the Alma interface for managing bibliographic records:

- Top Screenshot:** Shows a context menu for a selected item. The "Manage Selected" option is open, with the "Relink to another bib" option highlighted with a red box.
- Middle Screenshot:** Shows the "Relink items to another Bibliographic record" screen. It displays a search bar with "All titles" and "MMS ID" set to "991014466129705181". Below the search bar are buttons for "Select Bibliographic record" and "Select from a list".
- Bottom Screenshot:** Shows a confirmation dialog titled "Last item(s) of Holdings record deleted or moved". It asks what to do with the holdings record. The "Delete bibliographic record (unless other holdings are present)" option is selected and highlighted with a red box.

Relink Items to Main Bib Record (Alma Sets)

1. Work through any remaining Host Bib Records and eventually all that should be left in the Set is:
 - Main Title Bib (as named in the Set name)
 - Individual Title Bib(s)
2. Check Main Title Bib data looks correct using 'display in discovery' - Primo VE view
3. Check each Individual Title Bib using 'display in discovery' - data should match up with the correct item volume, barcode, and series
4. Check all the items on the Main Title Bib now all look ok (e.g. they have correct location, Item Policy, Material Type, description etc.)
5. **These checks confirm that all the data matched correctly**
6. When completed a Set – note it as completed in Excel and delete set from Alma

BOOK
Pierre Bourdieu's sociology of education : the theory of practice and the practice of theory.
2004
British journal of sociology of education.; no:30106017571372
Available at Offsite Store Hillary Place Store (Store JB08 Education 0 BRI) >

Location
Request Other Issue
[BACK TO LOCATIONS AND CLASSMARKS](#)

LOCATION ITEMS
Offsite Store
↳ RELATED TITLE: [British journal of sociology of education.](#)
Available, Hillary Place Store ; Store JB08 Education 0 BRI
Summary holdings: v.18 (1997)-v.25 (2004)
Notes: NOTES: Print

Item in place (0 requests) v.25, 2004
7 Days Loan Material Type: Issue
Location: Offsite Store Hillary Place Store Store JB08 Education 0 BRI
Barcode: 30106017571372

Request

Details
Title: Pierre Bourdieu's sociology of education : the theory of practice and the practice of theory.
Is Part Of: [British journal of sociology of education.; no:30106017571372](#)
Publisher: Basingstoke : Carfax
Creation Date: 2004
Subject: Bourdieu, Pierre, 1930-2002 >
Series: [British journal of sociology of education ; v.25, no.4, Sept. 2004](#)
Format: p.412-544 ; 25 cm.
Source: Library Catalogue
General Note: Special issue of: British journal of sociology of education v.25, no.4, Sept. 2004.
Language: English



Time Estimate: 2 months for 803 records - 3 people shared, fitting around normal work



Benefits and Impact

- Previous manual process fixed: **average 760 Host Bib Records per 12 months**
- New process fixed: **803 Host Bib Records in 2 months**
- 773 fields added since project began: **1,019**
- Analytics reports created to calculate these metrics (shared in University of Leeds, UK Reports):
 1. Total 773 fields added for Host Bib Project – Template Report
 2. Total Host Bib Records Fixed (Deleted) – Template Report



Time saved per 800 records: approx. 10 months



New process is 6 times faster than manual process

- **Other Benefits:** Lowers risk of human error with 773 field. Learning new tools and skill development!

Quicker ways to fix Host Bib Records?



Ideas for improvement – Share your ideas/collaborate!

- Could the Host Bib Records that were excluded using filters in Analytics in Phase 1 somehow have been included? (i.e. the Host Bib Records with more than one item attached, or with more than two 774 fields)
- Could determining the Main Title Bib in the Excel part of the process be quicker?
- Was Excel the best tool to use, or could another tool work better e.g. Open Refine?
- Set creation process for item relinking could be faster and more automated, but how..?
 - Python? Microsoft Power Apps? Cloud App? MarcEdit Alma API?

**Any questions
...or suggestions?**

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Feel free to get in touch and/or find me at the Conference!



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